



Setting Standards for
Retirement Communities

Commercial Partnerships

2022 - 2023



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Welcome



Nick Sanderson
Chair
ARCO



Jane Ashcroft CBE
Vice-Chair
ARCO



Michael Voges
Chief Executive
ARCO



Tade Muiyiwa-George
Partnerships Manager
ARCO

From our Chair and Vice-Chair

The IRC sector is taking off! The last twelve months have been a transformative year for housing-with-care for older people in the UK. Demand is booming, investment is rolling in, far more IRCs are being built and finally the Government has heeded ARCO's calls and set up a Task Force to help expand housing and care provision and choice for older people.

The trends have been there for a while and many of us have been predicting this for years – older people want and deserve better options. With a new generation of baby boomers just starting to move in to IRCs and with the pandemic reminding people just how important our homes, surroundings and communities are we have now passed a tipping point.

A number of important challenges remain and the sector will remain focused on engaging positively with the Government and with the Task Force to ensure that this once in a generation opportunity does not go to waste. We welcome all the offers of support and the significant levels of engagement we are seeing from investors and partners in this.

It has never been more important that sector speaks with a single, clear and united voice on the issues which matter to our residents, workforce and stakeholders – we are fortunate that ARCO is so well positioned to serve this role and to build on the success we have seen over recent years to help forge a bright future for our sector.

From our Chief Executive and Partnerships Manager

Wherever we go, wherever we look – finding innovative, customer-centric solutions that address the housing and care needs of our ageing population is at the forefront of people's minds in every country we look at when it comes to finding comparable challenges to the one we face in the UK.

Now that the government is finally taking our sector seriously, we are excited to be working with our members and partners on putting in place the foundations on which a much larger, more sustainable sector will be built – to put things into perspective: current provision of IRCs will be dwarfed by the future expansion of this sector over the coming decades.

Becoming a member or partner means joining a network of like-minded organisations working together to shape the future in a meaningful way – putting customers at the heart of what we do, working in partnership with government and policymakers and continuously thriving to focus on solutions that create social value. We are grateful for all our members' and partners' support over the years – now that ARCO is 10 years old, we are very much looking forward to our next 10 years together!



What is ARCO?

ARCO stands for the Associated Retirement Community Operators and is the main trade body representing the Housing-with-Care sector in the UK.

ARCO's objective is to serve as the voice for the UK Integrated Retirement Community sector, its operators, its investors, and its residents. We seek to elevate and drive quality standards; help shape a fit for purpose legislative environment and grow the industry for the mutual benefit of all stakeholders.

ARCO's aim is to see a sustainable, universally understood, and well-regulated Integrated Retirement Community sector in the UK. Our aim is a large scale, commercially viable and supportive housing offer that promotes independence, eliminates loneliness, and makes the last move in people's lives their best.

What are Integrated Retirement Communities?
















Integrated Retirement Communities offer older people the opportunity to live independently in their own home as part of a wider community. Integrated lifestyle, wellbeing and care services are available to support people's independence and aspirations.



Living Options for Older People

How are Integrated Retirement Communities different from other forms of housing for older people?

Integrated Retirement Communities are the fast-emerging 'lifestyle option' for older people. The chart below shows how they sit between Retirement Housing where minimal support is provided, and Care Homes where there is a high level of dependence:

 Retirement Housing Also known as: <ul style="list-style-type: none"> • Sheltered housing • Retirement flats or communities 	 Integrated Retirement Communities Also known as: <ul style="list-style-type: none"> • Extra care • Retirement villages • Housing-with-Care • Assisted living • Independent living 	 Care Homes Also known as: <ul style="list-style-type: none"> • Nursing Homes • Residential Homes • Old People's Home
 Offers self-contained homes for sale, shared-ownership or rent	 Offers self-contained homes for sale, shared-ownership or rent	 Communal residential living with residents occupying individual rooms, often with an en-suite bathroom
 Part-time warden and emergency call systems. Typically no meals provided	 <ul style="list-style-type: none"> • 24-hour onsite staff • Optional care or domiciliary services available • Restaurant / Cafe available for meals 	 24-hour care and support. Meals included
 Typical facilities available: <ul style="list-style-type: none"> • Communal lounge • Laundry facilities • Gardens • Guest room 	 Typical facilities available: <ul style="list-style-type: none"> • Restaurant and Café • Leisure Club including: gym, swimming pool, exercise class programme • Communal lounge and/or Library • Hairdressers • Gardens • Guest room • Activity (Hobby) rooms • Social event programme 	 Typical facilities available: <ul style="list-style-type: none"> • Communal lounge • Laundry facilities • Gardens • Guest room
 Typically 40 - 60 homes	 Typically 60 - 250 homes	 Sizes vary considerably

What ARCO does for Members and Commercial Partners



Policy & Influence



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

We are building awareness of the sector and increasing its influence with the public and key decision makers through our work with the media, social media, political allies and consumer advocates. We are also supporting the work of the recently established cross-Government Older People's Housing task force to develop the regulation our sector needs to grow and to tackle barriers holding back supply.

Why we do it:

The key to the sector's expansion is consumer and investor confidence. Only by helping to create a legislative environment that formally recognises Retirement Communities integrated with care as a unique asset class can we create the strong foundations on which the sector.

Regulation & Compliance



Delivered through our Consumer Code framework with continual assessment of Members to ensure the best consumer experience is achieved.

We are working hard with stakeholders to develop the future regulatory operating environment for Integrated Retirement Communities in the UK.

We are setting standards today, but also designing the standards of the future.

Why we do it:

Consumer confidence via robust consumer protection is paramount to the success of our sector. We hope that the rigorous consumer standards that we set today will be adopted in future sector specific legislation. Until this legislation is passed we must self-police to drive, maintain and elevate standards. We seek to continuously improve in this arena.

Events & Collaboration

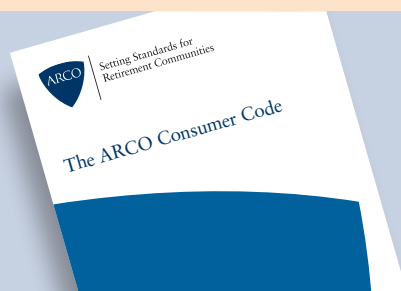


Delivered through a regular series of thought-provoking events (live and digital) with specialist working groups, roundtables, seminars, research and reports.

We also collaborate with leading organisations in the Adult Social Care sector via the Care Provider Alliance. We provide a focal point for sharing best practice, exchanging knowledge and collaboration. ARCO serves as a networking 'club' for both operators and commercial organisations who are currently working in or want to work in this sector.

Why we do it:

Our sector, our product, and our value offer are constantly evolving. ARCO provides an events calendar platform through our events programme and annual conference where organisations of all types can network and explore common challenges and solutions in a collegiate atmosphere. Integrated Retirement Communities are fundamentally a 'people' businesses and ARCO events are where industry people gather.



The Year Ahead: ARCO 2022-23 Events and Collaboration Programme

ARCO run a regular series of thought-provoking events in-person and online (including a sector-leading annual conference), with specialist working groups, roundtables, research and reports.

We provide a focal point for sharing best practice, exchanging knowledge and collaboration.

The ARCO Programme in 2022/23*

2022			
September <hr/> Finance Forum <hr/> ARCO 10th Birthday Party, Network Briefing & Drinks Reception	October <hr/> ARCO Annual Leadership Dinner <hr/> ARCO Member Workshop (online)	November <hr/> ARCO Member Workshop <hr/> ARCO Advisory Council Meeting	December <hr/> ARCO Christmas Network Briefing & Drinks Reception
2023			
January <hr/> ARCO Board Meeting <hr/> ARCO Member Workshop <hr/> ARCO Advisory Council Meeting	February <hr/> ARCO Member Workshop <hr/> ARCO IRC 101 Session	March <hr/> ARCO Member Workshop <hr/> ARCO Spring Network Briefing & Drinks Reception <hr/> ARCO Advisory Council Meeting	April <hr/> ARCO Board Meeting <hr/> ARCO Member Workshop
May <hr/> ARCO Advisory Council Lunch <hr/> ARCO Member Workshop	June <hr/> ARCO Summer Network Briefing & Drinks Reception <hr/> Accelerator Lunch	July <hr/> ARCO Annual Conference and Drinks Reception	

*Please note this calendar is correct at the time of printing and it may change – please refer to ARCO events page for up-to-date events. www.arco.org/events



Our Impact and Reach in 2021-22

Older People's Housing Task Force

There is consistent evidence from around the world that the growth of the older people's Housing-with-Care sector depends on suitable and effective sector specific legislation. In the UK this has been held back for years because policy responsibility for our sector is split across six different government departments and local government. To that end ARCO determined that there was a need for a coherent and joined up approach to our sector and a way of securing a clear direction from Government. This is why we spent two years advocating for and building up the evidence base for a cross-Government Task Force. To that end we released a number of thought leadership reports, secured over a thousand pieces of relevant media coverage including an open letter to the Prime Minister signed by 40 investors, charities, academics, older people's advocates and Parliamentarians, held a Westminster Hall Debate and secured the tabling of almost 200 Parliamentary Questions. As a result of these efforts we saw clear commitments to our Task Force in three Government White Papers in a month, most specifically in the Government's Levelling-up White Paper. This Task Force represents a once-in-a-generation opportunity to shape the way our sector grows, develops and is regulated. We are now working hard to inform its work so that it produces the best possible outcomes for older people, providing clarity and consumer protection as well as reassuring investors and operators and establishing IRCs as a key part of the housing and care systems in the UK.



Securing Ministerial and Government backing

November 2021 saw the Care Minister, Gillian Keegan delivering her first speech in the role at the ARCO Conference. The Minister took the opportunity to heap praise on our sector and to set out the scale and impact the Government how sees our sector achieving in the coming decades. The Minister encouraged the sector to be ambitious and to seek to grow rapidly over the coming years – stating that this was essential in the context of the challenges the UK health system is facing.

In addition to this Lord Greenhalgh, the Housing Minister in the Lords and Stuart Andrew, the Housing Minister as well as his predecessor Chris Pincher have answered Parliamentary Questions with consistent affirmations of the role of our sector and statements of Government backing.

Despite frequent turnover of Ministers in recent years the sector can take great reassurance that these commitments have now been embedded as cross-Government policy in White Papers including the Social Care White Paper – which recognised the crucial role that housing plays in care, and in the Levelling-up White Paper which answered ARCO's calls for a cross-government task force for the sector.

Scottish Housing-with-Care Task Force

ARCO was delighted to work with Sovereign Property Partnership and numerous sector stakeholders, experts and operators to develop a comprehensive plan to tackle under-provision of IRCs in Scotland – concluding in June 2022 at an event in The Scottish Parliament. This event and report received cross-party backing in Scotland and is already being fed in to Scottish Government policy.

Setting out the sector's policy priorities

Ahead of the cross-government Task Force which the Government launched in response to calls from ARCO we took the opportunity to set out the key policy issues and priorities for the sector in a series of briefing papers. These included positions on planning, social care, terminology, consumer protection and leasehold reform. These along with supporting evidence have been fed in to the Task Force and are helping to inform the work of this once-in-a-generation policy making body.

Influential reports

We've published ground-breaking reports bringing new evidence and insights, and attracting widespread attention. In Autumn 2021 ARCO released an analysis of the quality and value of the care our sector provides, we followed this with the Retirement Reconsidered Report based on the largest ever survey of older people's views on housing and care. In addition we supported the Mayhew Review which set out the extent of unmet demand for IRC provision throughout the UK and the scale our sector needs to reach to support the UK's wider social care and housing systems in the decades ahead.

Press and media

We've secured hundreds of articles in national, regional and trade press, including on our report launches, the Mayhew Review, Retirement Reconsidered and the Task Force launch. We've also written a range of comment pieces drawing attention to the great work of our members.

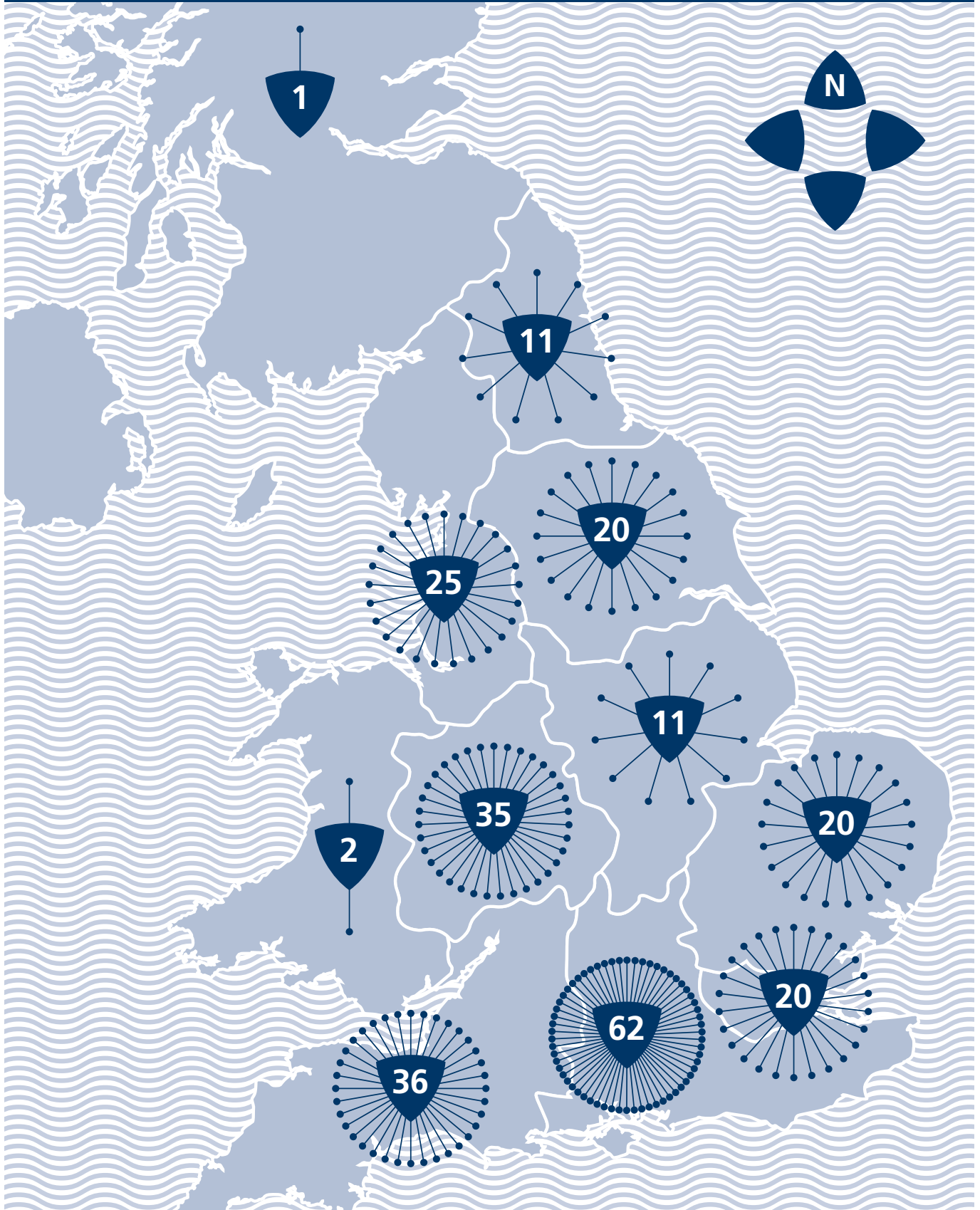
**We're up to 30
Parliamentary
Supporters**

**Social media followers
have more than doubled:
we now have over 1,660
Twitter followers and nearly
2,500 LinkedIn followers**



ARCO Approved Operator Registered Communities in the UK

The number of Approved Operator Communities within each region





APPROVED
OPERATOR

East Anglia (20)

Abbeyfield
Anchor
Audley Group
ExtraCare Charitable Trust
Inspired Villages
MHA
One Housing Group
Retirement Security
Retirement Villages

East Midlands (11)

Anchor
Audley Group
ExtraCare Charitable Trust
MHA
Retirement Security
Richmond Villages

London (20)

Anchor
Audley Group
Birchgrove
Brio Retirement Living
Elysian Residences
Jewish Care
LifeCare Residences
One Housing Group
Retirement Security
Tonic Housing

North East (11)

Anchor
MHA
Middleton Hall Retirement Village

North West (25)

Anchor
Adlington Retirement Living
Enterprise Retirement Living
Inspired Villages
MHA
Retirement Security
Richmond Villages

Scotland (1)

MHA

South East (62)

A2Dominion
Abbeyfield
Anchor
Audley Group
Berkeley Healthcare
BEN
Birchgrove
Elysian Residences
ExtraCare Charitable Trust
Inspired Villages
LifeCare Residences
MHA
One Housing Group
Rangeford Villages
Retirement Security
Retirement Villages
Richmond Villages
St. George's Park

South West (36)

Anchor
Abbeyfield
Audley Group
Berkeley Healthcare
Brio Retirement Living
ExtraCare Charitable Trust
Inspired Villages
LifeCare Residences
MHA
Rangeford Villages
Retirement Villages
Richmond Villages
Retirement Security
St Monica Trust

Wales (2)

MHA
Retirement Security

West Midlands (35)

Anchor
Abbeyfield
Audley Group
Enterprise Retirement Living
ExtraCare Charitable Trust
Inspired Villages
MHA
Retirement Security
Retirement Villages
Richmond Villages

Yorkshire & Humberside (20)

Anchor
Audley Group
Enterprise Retirement Living
MHA
Rangeford Villages

Types of Commercial Partnership



Strategic Partner

Strategic Partners are the top tier ARCO Commercial Partners. They are organisations recognised as leaders in their fields who bring key specialisms and expertise to ARCO Operators (aka ARCO Members). Strategic Partners have exclusive access to all Member events. Strategic Partnership is subject to approval by the ARCO Board.

Partner

ARCO Partners are the mid-tier Commercial Partners. They are called on to advise the ARCO Board through the Advisory Council meetings and enjoy opportunities to network with ARCO Operators.

Affiliate Network

ARCO Affiliates are the entry level Commercial Partners. This level of partnership is perfect for organisations who are exploring the Integrated Retirement Community sector and wish to gain commercial traction in the sector. Affiliates get access to a wide range of events, receive e-bulletins and enjoy other benefits (as per page 11).

ARCO | Advisory Council

The ARCO Advisory Council is the engine room of collaboration and insight between ARCO Operators and their supplier /advisory partners.

The Advisory Council meets three times a year to look into topics selected by the ARCO Board every four months. The Advisory Council is open to Strategic Partners and Partners only.

The Advisory Council is by invitation only and organisations with relevant skill sets in relevant areas will be asked to attend at the discretion of the ARCO Executive Management Team.



Commercial Partnership Benefits and Fees



Benefits	Strategic Partners	Partners	Affiliates
Cost per year	£15,000	£7,500	£1,750
Attend exclusive ARCO Member events (forums & workshops)	✓	X	X
Opportunity to present at ARCO Member events (forums & workshops)	✓	Subject to ARCO invitation	X
Attend the ARCO Annual Leadership Dinner	✓	Opportunity to sponsor	X
Opportunity to attend ARCO Advisory Council Meetings	✓	✓	X
Attend ARCO Advisory Council Lunch	✓	✓	X
Opportunity to host ARCO Network Briefing & Drinks Reception	✓	✓	X
Showcase your business via the ARCO website and online Suppliers Directory	✓	✓	✓
Attend quarterly ARCO Networking events	✓	✓	✓
Attend ARCO IRC 101 Session	✓	✓	✓
Use of ARCO branding rights on your website and appropriate marketing material	✓	✓	✓
Receive the ARCO Eye - The Insider e-publication bi-monthly	✓	✓	✓
Opportunity to submit relevant content for Network News column in the ARCO Eye (subject to approval)	✓	✓	✓
Opportunity to write guest blog post on the ARCO website (subject to approval)	✓	✓	✓
Access to early bird rates and advance booking for the ARCO conference*	✓	✓	✓
Access to special ARCO Network reduced ticket rates for the ARCO conference*	✓	✓	✓
Access to discounted rates for ARCO Conference sponsor and exhibitor packages*	✓	✓	✓

*indicates an additional cost on top of partnership fee

Our 2021-22 Commercial Partners



ARCO Strategic Partners

NHBC	TIS (Total Integrated Solutions)
nicol thomas	Trowers & Hamblins LLP
Octopus Real Estate	Tunstall Healthcare UK
Sherpa CRM	Wates

ARCO Partners

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

ARCO Affiliates

Acuity Law	DL Planning	LaingBuisson	renray
Ageing Asia Alliance	EAC	Leecare	Saunders Boston Architects
Aging2.0	ECR	Life3A	SAY Property Consulting LLP
AR Architecture	EGYM	lottie	Silverbridge Properties
Arcadis	Eversheds Sutherland	Maccreeanor Lavington	Sovereign Property Partnership
ARC Engineers	Faithful+Gould	Mansfield Advisors	Spring
Assael Architecture	Forsters	Mayfly	Stride Treglown Ltd
Avante Care & Support	Fortwell Capital	Memory Tracks	Teal Living
Bernard Interiors	Fuze	Mills & Reeve LLP	Terence O'Rourke
Bridgman Commercial	Gardiner & Theobald	Montagu Evans	Tetlow King
Browne Jacobson LLP	GIA	Motionspot	The Care Workers' Charity
Centrus	Glide	Nexus Planning	The Joy Club
Christie & Co	Guardian Carers	Nick Baker Architects	The Salt Cave
Clifford Chance	Hafez Global Consulting	nobi	TLT
CMS Cameron McKenna Nabarro Olswang	Harrison Street	Osborne Clarke LLP	Travers Smith
ColladoCollins	Health Investor UK	Park Grove Design Ltd.	ukactive
Colliers International	Healthcare Property Consultants	Pegasus Group	West Waddy Archadia
Cubigo	Hoare Lea	Pollard Thomas Edwards	wifinity
DAC Beachcroft LLP	Ian Willams	pozzoni	wrdunn. Architects
David Phillips Social Living	Informed Decision	Prime	
DL Planning	Irwin Mitchell	Promatura Europe	
EAC	Karndean	Puma Property Finance	

Our Membership Types



ARCO Approved Operators

Approved Operators are Members of ARCO who have been through the stringent standards assessment programme with at least one scheme and have been formally 'signed off' as being compliant against the ARCO Consumer Code. These members typically have between 1-30 operational schemes.



ARCO Provisional & Prospective Members

Provisional Members are organisations who already have one or more operational Integrated Retirement Community open to residents and potential residents. They are currently going through the assessment process to achieve compliance against the ARCO Consumer Code.

Prospective Members are organisations who are in the process of building or getting ready to open their doors to their first residents. They are actively marketing their community and selling units off plan. Prospective members work closely with the ARCO Compliance & Engagement Manager and external assessors to achieve full compliance before they open their doors to residents.



ARCO Accelerator Programme

Accelerators are organisations who are at various stages of developing and preparing their plans for the future opening and operation of a Integrated Retirement Community. Some of these organisations already have experience of the sector and have a new venture to expedite. Some are new entrants to the sector or come from similar 'operationally' focused businesses but are not familiar with the specific complexities of operating an Integrated Retirement Community.



Partnership FAQs



How do I join?

To register your interest to join ARCO, please complete the online registration forms available via our website www.arcouk.org/join

What is the difference between an ARCO Member and an ARCO Strategic Partner, Partner or Affiliate?

ARCO Members are operators of Integrated Retirement Communities. ARCO Strategic Partners, Partners and Affiliates provide professional services or products to operators and are stakeholders in the Integrated Retirement Community sector.

Will you recommend my business and services to your Members?

Yes, in response to a specific request from a Member and if we believe your company is best placed to meet their need. This is not part of the ARCO commercial partnership offering, but something that we do regularly on an ad hoc basis.

Will I get the chance to network with your Members?

Yes, you will. All events are open to Members to attend, and we endeavour to always build networking time into our sessions. We also like to run open discussions as part of our events to encourage knowledge sharing and debate.

Will you share your Member contact list with us?

No - however, our Members are clearly listed on our website and there is also the opportunity to network at our events and conferences.

Is there a cap on how many members of my team can receive the ARCO Eye – *The Insider* e-bulletin?

No, we are happy to add unlimited members of staff to our bi-monthly e-bulletin. This can be done by emailing members@arcouk.org

How many members of my organisation can attend ARCO events?

The number of delegates per organisation entirely depends on our venue capacity. However, if we do have to restrict attendance to one delegate per organisation, we will operate a waiting list for any additional members of staff who wish to attend.

We want to get more involved with ARCO, how can we do this and what opportunities are there?

In addition to the different partnership options, there is also the opportunity to sponsor or exhibit at our annual conference. A range of sponsorship and exhibitor packages are available. Please contact our Membership Team if you would be interested in receiving our *What Next? 2023* Conference Sponsorship brochure.

Associated Retirement Community Operators (ARCO)

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For more information on ARCO, visit:

www.arcouk.org