



The 'spirit of living' in Woodchester Valley Village: Reflections on life in Britain's first mutually owned retirement village

In the middle of August this year, I travelled down to Woodchester Valley Village near Nailsworth just south of Stroud in Gloucestershire with Jeremy Porteus, Director of the Housing Learning and Improvement Network.

We were both familiar with Woodchester Valley Village and the Housing LIN had published a case study 'Woodchester Valley Village: How we turned a disaster into the first mutually owned retirement village' in July 2016. But we wanted to know more about what life was like for the residents since they took on the ownership of the Village and we wanted to learn from the directors and staff how they had taken on the role of managing the Village.

Beyond that, we were interested in how the ethos of Woodchester Valley Village had changed - what they called "the spirit of living" - and why they thought that providers of housing for older people should follow their example and develop further mutually owned retirement villages.

This viewpoint for the Housing LIN based on our findings is published to coincide with the Housing LIN's regional event 'CollaborAGE in the South West: Building healthy partnerships to meet the housing aspirations of our ageing population' and is part of a growing area of work by Housing LIN on 'People-powered change'.

Written by **Jon Stevens**, Honorary Research Fellow University of Birmingham, for the Housing Learning and Improvement Network

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Introduction

I first visited Woodchester Valley Village in 2015, when I was gathering information on housing developments for older people that were run and managed by their residents for a Housing LIN overview report on collaborative housing for older people.¹ And like many visitors before and since, I was immediately struck by the unique vision of the Village's resident owners.

Jeremy Porteus had alerted me to the interesting developments that were taking place at Woodchester Valley Village. After my visit and the publication of the overview, we invited Peter Wilson, Chair of Woodchester Valley Village, to attend the Housing LIN annual conference in March 2016 on 'People Powered Change'.² After all, what better example could there be of the potential of 'people power' than a housing development for older people that had been taken over by the residents themselves? After the conference, Jeremy asked Peter to write a more detailed account of the whole Woodchester story.

Peter Wilson's record of how the residents of Woodchester Valley Village 'turned a disaster into the first mutually owned retirement village' was published by the Housing LIN in July.³ In it he describes how the residents raised around £2million mainly from their own resources so they could takeover the village, when the original owners of the village went into receivership after several years of uncertainty in 2010. He goes on to explain why they created a fully mutual enterprise to run the new village; he details some of the changes they made to the terms of their leaseholds including a reduction in the punitive resale transfer fee of 10% to 1%; and he comments on some of the things they have learned along the way. Peter also pulls no punches in describing the inherent problems with the conventional model of leasehold retirement housing.

When I had met Peter, and in later conversations with him, he had said that he felt that Woodchester Valley Village could and should provide a model for future retirement communities. In his view, *"more community owned places like Woodchester Valley Village would ensure that many people could look forward to a stimulating, sociable and secure old age"*.

To find out more about how this was working in Woodchester, Jeremy and I arranged a visit to talk to some of the established and more recent residents, to meet again with the directors and to spend some time with the Village Manager. It was a short visit but we met eleven people in all and they gave us a compelling picture of life in Woodchester and of the 'spirit of living' that seems to pervade the place. The account, which follows, puts this in their words.⁴

¹ Published as *Growing Older Together: An Overview of Collaborative Forms of Housing for Older People* (2016) by Jon Stevens for Housing LIN. It can be found at: www.housinglin.org.uk/library/Resources/Housing/Support_materials/Reports/HLIN_Growing_Older_Together_Report.pdf

² Housing LIN 2016 annual conference - 'People Powered Change: A Festival of Ideas' www.housinglin.org.uk/Events/HLINAnnualConference2016/

³ *Woodchester Valley Village: How we turned a disaster into the first mutually owned retirement village* (2016) Housing LIN Case Study can be found at: www.housinglin.org.uk/library/Resources/Housing/Practice_examples/Housing_LIN_case_studies/HLIN_CaseStudy_125_WoodchesterValleyVillage.pdf

⁴ The words of the people we spoke to are italicised in the text. The names of people interviewed can be found at the end of the report.

This is our place

“Woodchester Valley Village is our place, we own it and we all have a say in how it’s run”

All of the original residents told us that the fact that the Village was now under their control was of great importance to them and that this gave them *“a great sense of security”*, after all of their troubles. Newer residents stressed that *“mutual ownership had been attractive to them”* when they moved to Woodchester and one explained that it had been a deciding factor for him.

All the residents agreed that it was important that *“this is our place, we own it and we all have a say”* in how the Village is run and that ultimately *“we are in control”* as they put it. At the same time, the residents were happy that day-to-day decision-making rests with the directors and with the staff. They all said they have *“great faith in the directors to make decisions that are in their interests; because they too are residents and they are accountable to all of us”*.

“The Village has its own ‘spirit of living”

Older residents explained how the Village had changed since they took on ownership. There is *“a lot more of a community now”* was a typical remark and they liked the fact that the whole place was more informal or *“non-institutional”* as one person put it. Several residents, particularly those who had experienced loss or who had experienced health problems, welcomed what they called *“the neighbourly support they receive from other residents at such times”*.

The Village Manager felt that living at Woodchester had *“added years to many peoples’ lives”* because of the mutual care and support, which is part of the fabric of the place. She referred to it as Woodchester’s *“own spirit of living”*.

“We have wonderful staff that we can always rely on”

Residents commented on the fact that it was good that the staff now worked directly for the mutually owned company and they said that since they had taken over they had been able to recruit excellent members of staff. One resident commented that it was a great reassurance that *“We have wonderful staff that we can always rely on”*.

“There were some teething problems of course”

People acknowledged that, *“There were some teething problems of course”* following the takeover. A small number of residents had not supported resident ownership and some of these are still not members of the freehold company. Nevertheless they are confident that soon the Village will be able to count all residents as members.

After the takeover had taken place, it took time for some residents to understand the boundaries that need to exist between the rights of individual leaseholders and the power and responsibilities of the mutually owned company acting on behalf of all residents. An example of this cited by the directors was that *“Residents need to understand that they cannot issue instructions directly to members of staff”* and that if they want things doing they may have to go through the Village Manager or even the board.

Equally, the directors and the Village Manager explained that they had to learn about the best ways of resolving conflicts and disputes *“so that residents didn’t feel imposed upon by an ‘outside authority’ in the way that they often did previously”*.

Together we make it work

“We needed to build trust”

Talking to the resident directors, they explained how they *“needed to build trust”* when they undertook the difficult and protracted process of taking Woodchester Valley Village over. Engaging with all of the residents and with family members was very important from the outset. The directors said they had to *“work hard to ensure that in taking over the village the residents were going to get a much better deal than had been the case under the original owners”*. Crucial to this was reducing what they called the *“iniquitous”* 10% resale transfer fee to 1% referred to in the introduction.

Now having secured that trust and having taken the scheme over, the directors recognise how important it is *“to maintain confidence in the village as a shared venture”*.

“Members and their families come first”

The directors talked about how they had developed what they called *“a membership culture”* in which everyone living in the Village could feel part of it in one way or another. They stressed that it was important to find ways in which *“everyone can contribute”* to the Village, whilst allowing people to get on with their own lives. This philosophy of making sure that members and their families come first is at the heart of the Village.

Social activities and events (large and small, formal and informal) are particularly important to the Village. They explained that residents hold *“frequent gatherings for family members of all ages and for other visitors and guests”*. They feel that this *“enriches Village life and helps people to stay connected to the wider world”*. They added that although the Village Manager and staff are not formally responsible for this *“they play an active role in supporting the community in many different ways”*.

“We have built an active and strong board supported by productive and enthusiastic working and advisory groups”

A great deal of thought went into designing the legal structures that underpin Woodchester Valley Village. As a mutually owned enterprise, the directors were conscious that *“it is important to strike a balance between the rights and responsibilities of the residents/members and the need for effective and timely ways of making decisions”*. Members are consulted regularly at quarterly meetings and in other ways, but between meetings directors are generally empowered to make decisions on behalf of the members.

In appointing directors, they stressed *“it was important to obtain a balance of skills”* and added that *“having up to half the directors from family members is of benefit in this respect”*. It was equally important to ensure that members could have different ways of contributing; beneath the board are a number of working groups dealing with specific aspects of the business and alongside of this are various advisory and support groups. Developing an active and strong board supported by productive and enthusiastic working and advisory groups has created many opportunities for members to participate in running the Village.

None of this happens by chance. It requires what the chair calls *“agile recruitment”*. They are always on the look out for new ways for members to get involved by supporting viewings or initiating new social activities and so on.

“Good and regular communication is essential”

Woodchester is a small and compact community but nevertheless the directors feel that *“good and regular communication with members and their families is essential”*. The Village Manager produces regular newsletters (in both electronic and paper versions) and quarterly meetings receive thorough and clear documentation setting out the rationale and basis for decisions taken or required. As they put it, *“It is important that the board and its workings are as transparent as possible and that care is taken to balance expectations and to accommodate minority views wherever possible”*.

“We have recruited effective staff and we are looking to employ the best local services”

Once the mutual company was set up the directors felt that *“it was particularly important to find the right person to manage the Village”*. They wanted someone who was a good administrator but with real people skills, but they also wanted someone who shared their strategic vision and who could help them to drive the business forward. This was a tall order but they were able to appoint a Village Manager two years ago from a mixed business background, who has more than met this specification.

The manager has a team of 16 staff, including housekeepers, chefs, gardeners and a handyperson. Her aim is to provide what she calls a *“seamless service”* and all of the residents spoke highly of the manager and the whole staff team.

The directors explained, *“We have been less happy with the managing agents and suppliers we have used and with some of the legal and property professionals we have dealt with”*. They are now looking to take most of the management services in-house. And for professional and contract services, they have moved their business to mainly local firms and suppliers, who have demonstrated an understanding of the Village and of its requirements, rather than seeing them as just another customer.

“Not everyone shares or understands our vision”

As noted above, not all of the existing residents share or understand the vision behind Woodchester Valley Village but this is a small and diminishing number. And other parties such as managing agents have failed to understand the practicalities of the Village.

The directors have a particular gripe with solicitors and estate agents. They said that most of them *“had made little effort to understand the legal structure and mutual arrangements of the Village”* and that as a result when it comes to sales and purchases many people had been poorly advised. As a result the Village Manager is taking an ever more active role in sales, supported by an experienced and very knowledgeable sales consultant.

What comes next

“Our job is not done by any means”

Over the last few years the residents of Woodchester Valley Village have expended a great deal of time and energy in saving their homes and their community. As is recounted in the recent case study report for the Housing LIN⁵, this was by no means an easy process. There are still outstanding matters to resolve but the load is reducing and they are now able to focus on plans for the future. They stressed, *“Our job is not done by any means”* but added that it is up to them now that they are fully in control of their destiny.

⁵ Ref. Note 2.

“Spreading the word”

One challenge is about *“spreading the word about the Village”*. Part of this is about strengthening and enriching the community and several residents of the Village stressed that, *“We want Woodchester to be an outward looking and inclusive place”*. To this end, they are actively building links with the nearby village and with the wider community as described earlier. Many residents explained that they come from the surrounding area and for them in particular it was important to continue playing an active part in the wider community.

It is also about ensuring the continuing success of the Village. They still have to encourage people to move there as some have been put off by the earlier problems and they still need to promote the unique vision of Woodchester Valley Village. The Village has attracted a lot of attention and this has been beneficial. For instance, one resident told us that Angela Rippon’s report on the Village for the BBC’s One Show⁶ had been instrumental in his moving there.

“There is a need for more places like ours”

The residents and directors are convinced that, as they put it, *“there is a need for more places like ours”*. They have become strong advocates for retirement communities that are owned and managed by the people who live there. They explained that, *“What happened here took place under duress but the outcome for residents has been far better than anything we imagined when we first moved here”*. And newer residents attest to the particular attraction and appeal of the Village. Some added that from the experience of their friends many of the problems and difficulties encountered by the residents of the original village are found in similar developments. With the chair, they believe that *“retirement housing needs urgent reform”*.⁷

Furthermore the chair and the directors said, *“We see no reason why progressive developers of housing for older people shouldn’t replicate our model”*. Indeed, they argue that the developers are being short-sighted in failing to realise that there could be a significant market for housing for older people, which allows them to retain their independence whilst being part of a wider community - a community, which gives them a shared sense of security and support and a community, which they participate in and run themselves.

⁶ You can find this on YouTube, see: <https://www.youtube.com/watch?v=S33U-Oq3vI4>

⁷ Ref Note 2: pages 5 and 6 of the Case Study.

Acknowledgements

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About the author

These reflections of the experiences and views of the residents, directors and staff of Woodchester Valley Village have been compiled by Jon Stevens, Honorary Research Fellow from the Housing and Communities Research Group University of Birmingham with help from Jeremy Porteus, Director of the Housing Learning and Improvement Network.

For more information, contact: jon.stevens777@gmail.com

Note

The views expressed in this paper are those of the author and not necessarily those of the Housing Learning and Improvement Network.

About the Housing LIN

The Housing LIN is a sophisticated network bringing together over 40,000 housing, health and social care professionals in England and Wales to exemplify innovative housing solutions for an ageing population.

Recognised by government and industry as a leading 'knowledge hub' on specialist housing, our online and regional networked activities:

- connect people, ideas and resources to inform and improve the range of housing choices that enable older and disabled people to live independently
- provide intelligence on latest funding, research, policy and practice developments, and
- raise the profile of specialist housing with developers, commissioners and providers to plan, design and deliver aspirational housing for an ageing population.

To access the Housing LIN's comprehensive list of online resources on coproduction and user involvement, visit:

www.housinglin.org.uk/Topics/browse/HousingOlderPeople/UserInvolvement

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Housing Learning & Improvement Network
c/o EAC, 3rd Floor,
89 Albert Embankment
London SE1 7TP

Tel: 020 7820 8077

Email: info@housinglin.org.uk

Web: www.housinglin.org.uk

Twitter: @HousingLIN & @HousingLINews