

Institution: Keele University
Unit of Assessment: C 22 Social Work and Social Policy
Title of case study: Housing, Care and Wellbeing in Old Age: improving the living environments of older people
<p>1. Summary of the impact</p> <p>Keele's research on retirement communities, care and wellbeing in old age has contributed to a transformation in the way in which housing for older people is conceived of, built and experienced across the UK (and beyond), and has led to improved quality of life for thousands of older people. It underpins national, regional and local policies; has improved stakeholder (charities, trusts, businesses) and practitioner understandings of the significance of suitable housing and care; and had direct impact on practices at Berryhill Retirement Village and, more widely, on ExtraCare - the charity who have developed and now run 14 retirement villages and 17 housing schemes, including Berryhill, across the Midlands and the North of England.</p>
<p>2. Underpinning research</p> <p>Research on age-segregated retirement housing for older people has been carried out by members of Keele University's internationally recognised Centre for Social Gerontology since 1997 (Phillips <i>et al.</i>, 2001). Initial research (1997-1999) compared a small age-segregated housing project with a community-based sample of older people. It found that, over time, residents in the housing project maintained a more consistent level of functioning than their peers living in the community (Kingston <i>et al.</i>, 2001). This was followed in 1998 by pilot work in Berryhill Retirement Village in Stoke-on-Trent which underpinned a successful bid to the then National Lottery Charities Board.</p> <p>The resulting study of Berryhill (Bernard <i>et al.</i>, 2004), carried out from 2000-2003, was the first UK research to examine a purpose-built retirement village aimed at accommodating a local, working-class population. It yielded important insights into the extent to which an environment of this nature was able to meet the evolving social needs and expectations of residents over time; revealed the positive impacts the village had on people's health, identity and well-being; and uncovered what it was like to live and work in such an age-segregated setting. The key findings from this pioneering study show that: (i) Berryhill worked well for its predominantly lower-income residents who came from an urban area that was significantly below the national average on key indicators for health and well-being; (ii) although their health status was generally poor, substantial proportions of respondents felt that life had got much better since moving to Berryhill, and this improvement was maintained over time; and (iii) the safety and security offered by having care and support on one site was particularly valued. Whilst capable of delivering significant improvements to the quality of life of older people and providing an environment in which to 'age well', the study also articulated the many challenges around mixing 'fit and frail' older people for all involved, and the wider lessons which could be drawn by developers, policy-makers and practitioners wishing to develop similar schemes (Bernard <i>et al.</i>, 2004; 2007).</p> <p>The researchers at Keele have continued to attract competitive funding for work on other purpose-built retirement villages: in 2005, Bernard, Bartlam, Scharf and Sim were awarded the tender to undertake a study of Denham Garden Village in Buckinghamshire. Carried out from 2006 to 2010, the Longitudinal Study of Ageing in a Retirement Community (LARC) explored the effects of the 2001 redevelopment of Denham Garden Village by Anchor Trust (the largest provider of retirement housing and care for older people in England) (Bernard <i>et al.</i>, 2012). In addition to furthering our understanding of what it is like to live and work in these environments, this study highlights the need for much greater clarity from developers and policy-makers around how such age-segregated environments may fit with the current policy emphasis on creating age-friendly cities and communities (Bernard <i>et al.</i>, 2012; Liddle <i>et al.</i>, 2013).</p> <p>The totality of this work on retirement communities thus draws attention to enduring questions in respect of their capacity to support ageing in place; the accessibility of local amenities and</p>

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activities in the wider neighbourhoods; opportunities, if any, for intergenerational interactions; and the training of staff. Those responsible for developing such communities need genuine and explicit commitments from all levels in their organisations (managers, staff and residents) if they are to be able to engage in the necessary cycle of planning, implementation, evaluation and continual improvement, and especially if they wish to be a crucial part of the rapidly developing age-friendly agenda.

Researchers involved: Professor Miriam Bernard; Dr Bernadette Bartlam – Research Fellow and Lecturer; Professor Simon Biggs (at Keele until 2004); Jennifer Liddle – Research Assistant/Associate; Professor Judith Phillips; Professor Thomas Scharf; and Professor Julius Sim.

3. References to the research

Key research outputs:

Liddle, J., Scharf, T., Bartlam, B., Bernard, M. & Sim, J. (2013) 'Exploring the age-friendliness of purpose-built retirement communities: evidence from England', *Ageing and Society*, DOI: <http://dx.doi.org/10.1017/S0144686X13000366>. (Journal article, peer reviewed).

Bernard, M., Liddle, J., Bartlam, B., Scharf, T. & Sim, J. (2012) 'Then and Now: Evolving community in the context of a retirement village', *Ageing and Society*, 32(1): 103-129. DOI: dx.doi.org/10.1017/S0144686X11000079. (Journal article, peer reviewed).

Bernard, M., Bartlam, B., Sim, J. and Biggs, S. (2007) 'Housing and Care for Older People: life in an English purpose-built retirement village', *Ageing and Society*, 27(4):555-78. DOI: dx.doi.org/10.1017/S0144686X07005983. (Journal article, peer reviewed).

Bernard, M., Bartlam, B., Biggs, S. and Sim, J (2004) *New Lifestyles in Old Age: Health, Identity and Well-being in Berryhill Retirement Village*, Bristol: Policy Press. (Book, peer reviewed).

Kingston, P., Bernard, M., Biggs, S. and Nettleton, H. (2001) 'Assessing the health impact of age-specific housing', *Health and Social Care in the Community*, 9(4): 228-34. DOI: <http://dx.doi.org/10.1046/j.1365-2524.2001.00298.x>. (Journal article, peer reviewed).

Phillips, J., Bernard, M., Biggs, S. and Kingston, P. (2001) 'Retirement Communities in Britain: a third way for the third age?', in Peace, S and Holland, C (eds) *Innovations, Adaptations and Segregations: Accommodating an Ageing Society*, Bristol: The Policy Press, pp.189-215. (Chapter, peer reviewed).

Funding:

1997-1999 *The Health Impact of Age-segregated Housing for Older People*. (Bernard, M. [PI], Biggs, S. and Kingston, P.). £60,000 from the West Midlands Regional Health Authority, LORS Scheme.

1998-2001 *Berryhill Retirement Village: a longitudinal evaluation*. £36,000 from ExtraCare and Touchstone Housing, to fund pilot qualitative research on this facility (new in May 1998).

2000-2003 *New Lifestyles in Old Age: Health, Identity and Well-being in Retirement Communities*. (Bernard, M. [PI], Biggs, S. and Kingston, P.) £177,000 from the National Lottery Charities Board.

2006-2009 *Denham Garden Village: a longitudinal study on the consequences of managing a mixed tenure development without a physical care centre*. (Bernard, M. [Co-PI] with Bartlam, B., Scharf, T., and Sim, J.) £270,000 from Anchor Trust (2006-09).

2009-2010 *LARC: Longitudinal study of Ageing in a Retirement Community*. (Bernard, M. [Co-PI] with Bartlam, B. Scharf, T. and Sim, J.) £150,000 from Anchor Trust to extend the above study.

4. Details of the impact

National Impacts: policy and the landscape of housing and care provision for older people

Described as 'pioneering' by key stakeholders, research by Bernard *et al.* on Berryhill was instrumental in highlighting the significance of suitable housing and care to the wellbeing of older people and to the shift in understanding and approach to provision by policy-makers and stakeholders alike, evident in the last decade. As one of only two projects at the time focussing on

new retirement communities (the other was research by Karen Croucher at York University), the research by Bernard *et al.* was essential to the impetus for, and development of, the 2008 government strategy *Lifetime Homes, Lifetime Neighbourhoods* [source 1]; facilitated through Bernard's invited participation at the Department for Communities and Local Government's expert seminar exploring the 'Impact of Changing Demography on Housing' (12th June 2007) and through links with senior civil servants in the Department for Communities and Local Government. The impact of this first government strategy on housing for older people has been sector-changing, making clear the significance of appropriate housing for the continued health, social inclusion, and well-being of people as they grow older, and setting in motion requirements for all new housing to be built to 'lifetime homes standards' by 2013 [source 2].

Further impacts can be seen in other housing strategies and in increased support for retirement villages as an option for older people. *HousingCare.org*, the flagship website of the Elderly Accommodation Council, recommends the research by Bernard *et al.* as essential reading, while the Joseph Rowntree Foundation report *Making the Case for Retirement Villages*, which cites Bernard *et al.*, is a key document used to provide information about retirement villages [source 3]. The research was also cited in policy and planning documents hosted by South Oxford Council [source 4] and Hampshire County Council [source 5]. Their influence extends to a major Australian report on housing which cites their research in detail [source 6].

The expertise of Bernard *et al.* has been utilised in other research, policy and practice forums on Extra Care housing over the last decade. Examples include Bernard's participation in four Joseph Rowntree Foundation Advisory Groups: supporting three Croucher *et al.* studies and one Personal Social Services Research Unit/Kent University study. Bernard was also a member of the Steering Group for PSSRU's evaluation (2006-10) of the Department of Health's Extra Care Housing Initiative. This evaluation employed a scale to measure cohesion/attachment to place, adapted from the LARC project [source 7].

The Keele researchers have actively disseminated their research beyond academia, and have had impact on the sector through this broader influence too. In 2005, they were founder members of, and have been regular contributors to, the Housing and Care for Older People Research Network: recently relaunched (in 2013) under the auspices of the Housing Learning and Improvement Network. The network provides a means of communicating research findings to commissioners, policy makers and end users.

Organisational Impacts: Berryhill Retirement Village and the expansion and growth of ExtraCare's Villages

Since opening Berryhill, ExtraCare has built a further 13 villages accommodating approximately 3000 residents, with more villages planned. The research by Bernard *et al.* led to a series of practice recommendations and organisational changes at Berryhill itself [source 8], as well as identifying specific issues that ExtraCare addressed in the building of subsequent villages.

At Berryhill, street meetings were reorganised to better facilitate democratic decision making; issues around death and bereavement were addressed by having an anniversary book to commemorate those who had died, together with regular staff training from an experienced bereavement counsellor; and ExtraCare now have wellbeing advisors in each village and hope to have Cruse bereavement counsellors too. The identified need to support residents' mental health, and especially to support those with dementia, led to ExtraCare funding further research and, subsequently, to providing a member of staff at each village to undertake and support individual care plans. This has significantly reduced the move on rate of such individuals. The research also demonstrated the importance of feelings of belonging to and settling in, and villages now run a 'friends' scheme 13 months prior to opening to enable future residents to be part of the decision-making about the development of the village. They also offer a 'friends membership' once a village is opened to those considering moving; enabling them to participate in activities and develop social connections with those already there. The design of new villages has included improved accessibility by installing automatic doors at the main entrance and between the village and accommodation areas, and making each residential apartment slightly bigger.

The rigorous academic quality of the research led the sector, including ExtraCare, to realise that research in itself was important to future investment planning. ExtraCare are funding a Keele PhD studentship (2012-15), exploring to what extent Berryhill can now be considered 'age-friendly'. To our knowledge, this is the first follow-up study of its kind in the UK. More broadly, ExtraCare continue to draw on the research, citing it in their magazine for residents [source 9]; hosting it on their website; citing it as a key source in other publications on the website [for example, source 10] and using it in their marketing of Berryhill [source 11].

5. Sources to corroborate the impact (indicative maximum of 10 references)

Source 1: Communities and Local Government (February 2008) *Lifetime Homes, Lifetime Neighbourhoods – a national strategy for housing in an ageing society*, London: DCLG, DoH and DWP.

Source 2: Department for Communities and Local Government (December 2008) *Delivering Lifetime Homes, Lifetime Neighbourhoods: A National Strategy for Housing in an Ageing Society*. London: DCLG, DoH and DWP.

Source 3: Housing Care. Org. *Retirement Villages Advice Guide for Older People*
<http://www.housingcare.org/guides/item-retirement-villages.aspx>

Source 4: Rogers, R. (2011) *Planning and Delivering Continuing Care Retirement Villages*. Telow and King Planning: Bristol. http://www.southoxon.gov.uk/sites/default/files/SODC_26a.pdf

Source 5: Director of Environment (2009) *Housing Provision for Older People in Hampshire*. Hampshire County Council
http://www3.hants.gov.uk/housing_provision_for_older_people_nov_2009.pdf

Source 6: Jones, A. *et al.* (2010) *Service integrated housing for Australians in later life*. Australian Housing and Urban Research Institute.
https://www.agedcommunity.asn.au/publications/documents/AHURI_Final_Report_No141_Service_integrated_housing_for_Australians_in_later_life.pdf

Source 7: See: Darton, R. *et al.* (2011) *Evaluation of the Extra Care Housing Initiative: Technical Report*. PSSRU: Kent. <http://www.pssru.ac.uk/pdf/dp2783.pdf>

Source 8: Ray, M. (2001) Residents' Experiences of Living at the Berryhill Retirement Village: a qualitative study, unpublished final report to the ExtraCare Charitable Trust, Keele: Keele University.

Source 9: *ExtraLife*: the magazine for ExtraCare's residents, September 2012.

Source 10: http://www.extracare.org.uk/media/45055/jrffindings_0166.pdf

Source 11: <http://www.extracare.org.uk/extracare-communities/locations/berryhill-village.aspx>

Corroborators:

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