

# Review of Camphill Village Trust

October 2012

GROUNDSWELL PARTNERSHIP



# **Review of Camphill Village Trust**

In Control

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## The review

**This report and its recommendations aim to contribute to the wider review being undertaken by Camphill Village Trust (CVT) to help shape the future of the charity. We were asked to consider how CVT could move forward confidently in the future - retaining those things that are special and even unique about Camphill communities while responding well to modern policy and practice. In particular trustees asked us to offer views about how well CVT is implementing personalisation and how best to shape it within a Camphill ethos. In developing our advice in these areas we agreed to:**

- Consider current policy and advanced practice in respect of supporting people with disabilities and how well aligned CVT philosophy and practice is with this - in particular the personalisation agenda.
- Explore the sustainability of CVT's provision in the context of external commissioning and other developments.
- Consider key internal features and developments relevant to CVT's future relevance and sustainability – to include the views and insights of key internal groups of stakeholders.

### **This review has therefore:**

- Engaged with groups of internal people – people being supported, staff, families, managers and trustees - at collective events with a focus on personalisation.
- Undertaken visits to all nine English communities to gain an understanding of their operations and issues and to speak with community “staff”, managers, people being supported and their families.
- Reviewed many internal documents, reports, analyses, reviews and minutes.
- Interviewed a range of relevant ‘CVT/Camphill people’ (internal and external to CVT) and reviewed several submissions.
- Interviewed key staff from the main commissioning authorities.

We are very grateful to all the people being supported, workers, managers, trustees, families, commissioners and others for their hospitality and their time in helping with this review. A more detailed breakdown of the review process can be found at Appendix B.

The information and intelligence gathered, placed alongside our knowledge of policy and the external environment, has allowed us to develop an analysis and recommendations. The design of the review agreed with trustees was not intended to provide a quantitative survey of opinions but to identify and consider issues key to the future of CVT and its communities - including views held on important matters by people within and external to CVT. We believe this approach, within the constraints of time and resources, has allowed us to look at CVT in the round and consider many perspectives and ideas. We think this will be helpful to trustees because most CVT “insiders” are unlikely to have had the opportunity to gather such a range of perspectives and people may have felt able to be more frank with us than they might be, for example with a manager or trustee. In aid of our analysis we bring a high level of experience in working for and alongside organisations supporting people with disabilities, including roles as commissioners, families, providers and change agents. In addition our team brings the perspective of people who have a close understanding of the development and delivery of current disability and personalisation policy.

## **Who is being heard?**

Inevitably there are some voices that are louder than others in any group or organisation – some people are more confident or established or have stronger views. These people will always be heard in a review of this kind. This means that there is a risk that quieter voices – what might be termed the “silent majority” are not heard as strongly. During the community visits we made a conscious effort to not just to talk to people in leadership positions or to those who came to us to engage with the review. This led us to a view that there are likely to be many people who do not hold some of the more strongly expressed views about how CVT should operate now and in the future. We met, for example “workers” who were not engaged in some of the fiercer debates but who clearly held different views than those strongly expressed by some of their peers. These people held nuanced views on such issues as co-workers/paid worker balance, accommodating to commissioner and regulator expectations, range of provision and aligning with personalisation. We also have particular concerns that the views of many people supported by CVT are not being strongly enough heard amongst some of the debates within and across the communities. All these people will currently be anxious bystanders to the current situation in CVT and the present review.

## **Receiving and using the review report**

**We want this review to be of as much use as possible to the CVT trustees who commissioned it - to help them in playing their leadership role moving the charity forward. However as well as trustees, we hope the report will be helpful for all those that have a stake in the future of CVT. We suggest in our recommendations that the key points of analysis and recommendations be shared using a range of methods including ways that are accessible to people with disabilities and with families.**

We are aware that in a situation of tension and disagreements about the future of CVT, the review report may be received differently depending on varying positions and interests. We have offered firm views in some areas which will clearly not find easy acceptance from all. However we would urge people to engage with the analysis and recommendations. The review team is very happy to explain its analysis. Our only limit on this relates to confidentiality as we made commitments to people interviewed not to name them without permission in order that people could speak freely.

# Executive summary of findings

In our review we have found much that is good and great potential for the future. We have also identified significant areas where we believe change is needed. Our main findings are as follows:

## What's working well

1. The people we met on our visits appeared to be receiving **good support** and the families we consulted were largely very happy with the support being received and concerned to retain it.
2. CVT communities can be seen to be **offering something distinctive**, particularly in the area of contribution and community – important elements of personalisation. This can be built upon.
3. We met many **skilled and highly motivated people** supporting people with disabilities in the communities – this is a resource that needs to be nurtured and can form the basis of a strong future.
4. Many within CVT and the individual communities have **good ideas** about ways of developing what CVT offers and this is a resource to be used going forward.
5. Commissioner interviews indicate **good potential to align some communities with policy and commissioning intentions and specifically with personalisation**. There are more challenges for rural co-worker led communities but this alignment is possible for them as well.
6. **The role of CVT management** is seen as an important positive factor by commissioners, especially for those rural communities with significant co-worker presence. Any suggestion of removing the mediating function of CVT management from commissioner relationships is likely to be very counterproductive.
7. There is a remarkably strong consensus around a number of key elements that make CVT communities unique. These being the importance of deliberate and focused creation of **accepting communities** which offer an environment that allows people to feel belonging, develop their individual identity and self-confidence, contribute and be valued by others with respect and dignity. This consensus offers the possibility for resolving current tensions and making progress together.

## Key issues and areas for change

**Please be assured that we are aware of the on-going efforts of trustees, managers and people working in the communities in many of the areas set out below.**

1. There is currently **no single model** that animates all of the CVT communities equally. This presents significant issues for any attempt to retain a single identity based on Camphill history and philosophy. There is diversity on a number of dimensions: urban/rural, co-worker led/professionally managed/hybrid, stable/changing/changed, commercial/non-commercial, diverse expectations from different commissioners, different management styles.  
CVT therefore needs to proactively lead a process of re-envisioning for the future which can enable communities to engage with the external environment, develop best practice and engage with the expectations of commissioners and the wider sector – while retaining key existing features.
2. There are some internal debates about the **balance between supporting people and wider purposes for communities**.  
The charity needs to make very clear internally and externally that its primary purpose is the well-being of people being supported and that all other elements must contribute to that goal. It needs to further strongly demonstrate this in practice. However, CVT is well placed to bring to bear important features and assets that can enhance well-being which other charities do not possess. These can enhance well-being and give CVT the potential to face the future with confidence. These features include a distinctive operating model with ‘contribution’ at its heart; the assets include its land and building holdings plus other capital, and a strong donor-base. As we make clear below, to make the most of these certain key decisions are now needed.
3. There are significant levels of **tension and sometimes conflict** within some communities and in the relationship between some groups and CVT management and trustees. There are systemic tensions around: central control/local control; autonomy/accountability; outward facing/inward facing; co-worker led/professionally managed. These tensions need to be addressed, some of them urgently.

4. **Changes to the external context** – regulatory and commissioning expectations, economic environment, social care policy and external perceptions are combining with internal changes and developments to produce challenges. These forces are impacting on and being responded to differently across communities. The developing challenges mean it is going to be necessary (building on some work already underway in some communities) to adapt and align the CVT offer to these developments in terms of people being supported, services and supports offered (and probably costs and pricing).
5. The need to ensure **safeguarding arrangements** that truly keep people safe and that are acceptable to commissioners is assuming critical importance for CVT and for some communities in particular. Our consultations suggest that formal recommendations from the safeguarding advisor should be requested and urgent action needs to be taken to ensure that practice is effective, with clear and strong accountability. If action is not taken this could be a major threat to the reputation of CVT.
6. The future of co-working and the **role of co-working** in retaining critical elements of a “Camphill ethos” is a source of fierce debate and some strongly polarised views within the charity. Many see co-working as a vital ingredient but in those communities where co-working has largely ceased there is general confidence that it remains feasible to deliver good quality support with a distinctive community ethos and with a strong focus on contribution. In our view, retaining a form of co-working is possible and may be desirable in some of the communities. However we do not believe it can be sustained beyond the short term unless it is adapted to bring it more strongly within an accountability framework and changes are made to community finances and the co-worker reward structure.
7. CVT needs to start the discussion about co-working from what the communities are trying to achieve and the various forms of ‘workforce’ that can help achieve this. This would allow the development of a **different conceptualisation of co-working**. We believe with good will on all sides, it would be possible to gain a win-win here with a modernised co-worker system playing a positive and confident part in the future.
8. We have read and heard suggestions that the **diversity** of the nine communities means that a demerger should now be pursued, with the ‘co-worker led’ communities pursuing a separate future closer to a historical Camphill ethos. Our view is that this is unlikely that such communities would be sustainable. Commissioners of these communities clearly view the role played by CVT managers as very important.

9. There are a **range of internal views about CVT and personalisation**.  
Misunderstandings about personalisation and its compatibility with the Camphill ethos held by some need to be resolved. In our view it is desirable, necessary, and entirely possible to align CVT's purpose and goals with personalisation. If this is not done the risks to CVT's medium term future will be much higher. There is currently some general and local good practice in respect of personalisation but significant further developments are needed. We offer detailed suggestions below.
10. There is currently a **crisis of direction and ownership** within CVT which is starting to have 'real world' impact. Some view the appropriate role of the charity as primarily to provide support functions within a federation-type community led structure and that it has shifted wrongly to an 'ownership' and leadership role. In our view, however, this is a critical time for CVT and strong central leadership is now vital. As with any charity, the Board of Trustees is formally responsible for the direction and leadership of the charity and its communities and must play this role strongly. Failure to resolve and clarify this issue appears to be leading to inaction or delay on key matters.
11. Linked to the point above, the Board of Trustees, despite bringing high levels of commitment and investment of time, appears to be struggling to take the action needed at present to help the charity resolve key issues and move forward confidently. In our view some **changes to governance arrangements** are needed to allow the board to move key issues forward with a higher level of independence while retaining important internal voices in governance.
12. Serious attention needs to be given to **management and accountability systems**. It is not sustainable or workable to have parts of the workforce or communities operating outside of a framework of central management and accountability. All parts of the workforce and all communities will need to be brought within an accountability structure. Within this structure the maximum reasonable opportunities for local decision making should be sought. Flowing from work to further clarify the CVT vision, a range of management and specialist functions will need to be rationalised. We would expect communications, human resources and training and development functions to require strengthening during the transition period.

13. At a community level, despite the ethos of equality and some good systems and initiatives, **people being supported need to be more systematically involved in community decision making** and families are not always well linked with communities. Action needs to be taken to ensure that the voices of people supported are heard strongly and systematically and that local communities can adapt and grow ways of working that more strongly reflect what is important to people with support needs within their communities. Equally there needs to be a different and more representative balance to local and central governance arrangements which can reflect the views and interests of people being supported.

## Introduction

We want to start the report of our findings with two sets of contrasting observations. There are many positives to build on but CVT is experiencing a crisis of ownership and direction requiring a collective leadership response.

### Much to build on

Inevitably a review of this kind will focus on challenges and issues that need attention and action. We would like, however, to start with our general positive impressions. Although it is certainly our view that changes are needed and some of these will be difficult to achieve, it is also our view that there is much to celebrate, preserve and further develop in what CVT communities offer. On our visits, in the main, we found people happy and secure, confident, feeling valued and making contributions to their communities. We also found committed, caring and skilled managers, co-workers and staff - many with a clear vocation. We heard from family members who strongly value the nature and quality of the support and specific features of intentional communities.

In the majority of visits we saw positive and distinctive outcomes which could be reasonably traced to an ethos of community and contribution. Some of these outcomes are not regularly found in many services and supports for people with disabilities and can be credibly described as personalisation. In all of the communities to some degree and consistently in most we found people with disabilities who seemed mostly happy with their lives and living arrangements. We heard from families who felt the communities were serving their family members well and were very keen to retain features they felt were unobtainable in other forms of support.

In comparing the lives of people living in most of the communities with those using more typical services, the most noticeable positive difference was around contribution and its effects. Many more people were engaged in fulfilling activity than is often found amongst people living with their own families or using residential or supported living. This seemed to have a distinct impact on people's sense of worth and contribution. Generally people seemed to have friends and friendly relations and not be lonely.

We did not find the caricature of closed off places, with people kept deliberately apart from others, denied any choice and control over their lives, or experiencing institutionalisation. Our view is that every effort should be made by all at CVT to preserve what is good and distinctive about what is offered while adapting to external developments and taking positive

opportunities. We strongly advise CVT to see personalisation as a key positive opportunity to further enhance the lives of people with disabilities within a distinctive CVT offer.

Although finances were not part of our review we understand that notwithstanding revenue sustainability issues, CVT has considerable existing assets and a strong benefactor base. In our view the combination of this and the positive elements of communities offer opportunities that not all organisations possess in these difficult times. There is a chance to invest effort and resources over a transition period in the next few years which can allow CVT to bring the best of the past and present into a future vision and model of support for people being supported. While there are challenges and threats in the external environment, a CVT offer focused on building on key strengths while incorporating best practice from elsewhere can respond to some of the increasingly perceived deficits in mainstream provision for people with disabilities.

## **A moment for leadership**

**Despite the many good elements outlined above, we believe there is currently a serious political or ‘ownership’ crisis within CVT, which if it is not resolved soon will lead to a serious crisis in the real world of the lives of people being supported, the people providing support, and the sustainability of the communities. The internal tensions are clearly also being felt externally, with some of our external interviewees expressing concern. This presents serious practical and reputational risks.**

As with all such organisational conflicts a relatively small number of people are engaged in the fierce debates but these people have significant power and influence and often hold some of the strongest views about the past, present and future. The majority of CVT people are not directly involved and are looking anxiously on, waiting for their local and national leaders to find a way forward and many are worried about the future. Disappointingly it seems to us that the voices which often seem most absent in these debates are those of people supported.

We see a power-struggle being played out nationally and to some extent locally around, and using the instruments of: the historical purpose and ethos of Camphill, the changing external and internal context, ownership of aspects of governance, management and leadership, assets and resources. We see high levels of passion, anger and some conflict. The struggles have come to centre upon the roles, responsibilities, practices, power and future of co-workers - and particular communities.

We have seen other organisations going through such crises – which almost inevitably result from changes in internal and external contexts over time. Sometimes such crises lead to victory for one group over another. These are often, however, pyrrhic victories where power is gained temporarily but much is lost. If the conflict is not transformed into productive negotiation at some point, the result can be disintegration. We would suggest that now is the time for leaders of all kinds to try hard to avoid manoeuvring and struggle and to seek convergence and resolution. CVT needs now to find a settlement for its next phase.

Trustees have primary responsibility for the charity and must give clear direction to those with management responsibility and others. Our glimpse into the workings of the Board of Trustees from interviews and minutes suggest that despite high levels of personal investment, the board is struggling to discharge its leadership functions at present. One of the main reasons for this in our view is that the board is sometimes unable to take a sufficiently independent view of what action is needed. We return to this issue below.

It appears to us that one of the features of the current conflict situation is that there is a tendency to place blame on particular people or groups when the key challenges are actually produced by a changing world and the tensions of transition. We strongly urge all to refrain from angry and personal exchanges. This is a time when cool heads and respectful relationships are vital, even when there are strongly different views. Indeed we would urge all leaders and participants in the important debates to conduct them in a Camphill spirit.

The core challenge is to find convergence around a vision for the future that can lead to energy being placed into action to achieve that vision rather than internal struggle. This is vital in our view, because we believe strongly that CVT has much potential for the future. It must move over the next couple of years from ‘stuck’ and internally focused to confident and increasingly externally focused. It should shift from sometimes defensive reaction to commissioners, regulators and policy towards positive integration of national policy and international developments within a Camphill ethos. It should move towards positive presentation of the ways CVT is advanced compared to many others – in particular around building community and contribution. CVT can, if it makes this shift, have a sustainable future and one that is very worthwhile having. It can continue and extend the good support it gives to most people and furthermore it can help others to incorporate some of its approaches.

Most of the issues discussed in this report have been challenging for some significant time. There have been other reviews, proposals, development of models over the past few years. The board needs now to agree and drive a clear and coherent strategy over the short and medium term. This will involve a carefully crafted balance between quick action to resolve urgent issues and create the conditions for progress and more phased and measured medium term activity.

# The policy context: Personalisation – threat or opportunity?

## Key points:

- Policy on learning disabilities and social care places personalisation at its heart.
- There are risks that CVT communities, especially those that are geographically more separate and larger, may be defined externally as provisions that segregate and congregate people with learning disabilities and therefore run counter to the strong trend of policy and practice.
- There are mixed views, some misunderstandings and some anxiety discernible within communities about personalisation.
- To a variable degree, elements of personalisation have already been incorporated into CVT practice and behaviours and many people are positive about these developments.
- The ethos and history of CVT mean that the charity already responds very well to key elements of personalisation that centre on community and contribution.
- But other elements will need to be strengthened considerably.
- CVT needs to engage with personalisation in a smart way, negotiating and finding ways that its elements can be integrated with and aligned with the work of the communities – we believe this is possible and necessary.
- The Think Local Act Personal markers of personalisation progress – *Making it Real* can guide CVT developments.

## Introduction

**Although we are aware that CVT does not exclusively provide support for people with learning disabilities, this is the majority group. This chapter therefore focuses upon learning disability while broadening out to wider social care policy.**

Current English policy relating to people with learning disabilities was set out by the 2001 White Paper *Valuing People* and updated by the *Valuing People Now* strategy in 2009. These specific policies are set within the context of wider adult social care and health policy, in particular the 2010 Vision for Adult Social Care and the 2012 White Paper *Caring for our future: Reforming care and support*. At the heart of this policy context is personalisation.

*Valuing People* set out four key principles *rights, independence, choice and inclusion*. As the first significant policy initiative in 30 years it sought to confirm and drive forward the shift away from institutional provision and towards the inclusion of people as full citizens living lives like people without intellectual impairment. It reflected developments over several decades which increasingly accepted that people with learning disabilities could grow and learn and should not be denied life opportunities available to others. It sought to drive forward these developments:

*‘.. more needs to be done. Too many people with learning disabilities and their families still lead lives apart, with limited opportunities and poor life chances. To maintain the momentum of change we now need to open up mainstream services, not create further separate specialist services. People with learning disabilities should have the same opportunities as other people to lead full and active lives and should receive the support needed to make this possible.’*

Specific objectives included: enabling people to have more control over their lives, in part via person-centred planning; more control over where they live and who with; to lead full and purposeful lives in communities and via friendships, activities and relationships; to participate in employment and make valued contributions; to be supported by skilled people.

A range of approaches to achieving these objectives were deployed including action to close the remaining ‘mental handicap’ hospitals and later NHS campuses, modernise day services, introduce person-centred planning, strengthen advocacy and increase the use of individualised funding.

Regarding living arrangements, Valuing People allowed for a range of possibilities:

*'People with learning disabilities can live successfully in different types of housing, from individual self-contained properties, housing networks, group homes, and shared accommodation schemes, through to village and other forms of intentional community.'*

Increasingly, however, the focus was upon people mostly living away from settings where people were placed together in large numbers and separate from non-disabled people and more in domestic sized places alongside or close to people without disabilities.

*Valuing People Now* confirmed the key principles and direction of travel of the 2001 White Paper and focused its delivery plan in some key areas including:

**Personalisation:** .. all people with learning disabilities and their families will have greater choice and control over their lives and have support to develop person centred plans.

**Having a Life:** good health, choice over a home of your own, a fulfilling life beyond services including opportunities to work, study and enjoy leisure and social activities.

**People as citizens:** people with learning disabilities being treated as equal citizens in society and supported to enact their rights and fulfil their responsibilities.

*Valuing People Now* sat within the context of policies which had emerged following the 2005 White Paper *Caring For Our Future*. The key relevant policy development was the *Putting People First* concordat of 2007 which introduced the concept of personalisation into English social policy. Personalisation was consistent with the key principles of *Valuing People*. It is defined in the SCIE Rough Guide to Personalisation<sup>1</sup> as an approach:

*'...starting with the person as an individual with strengths, preferences and aspirations and putting them at the centre of the process of identifying their needs and making choices about how and when they are supported to live their lives. It requires a significant transformation of adult social care so that all systems, processes, staff and services are geared up to put people first.'*

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<sup>1</sup> SCIE Report 20: Personalisation: A Rough Guide  
<http://www.scie.org.uk/publications/reports/report20.asp>

*Putting People First* was signed up to by central and local government and a programme of support established to deliver it. The element that has gained most attention and traction is personal budgets, whereby people are able to self-direct the resources available for their support. However there were four main elements: choice and control, prevention, universal services and social capital.

Following the election of the coalition government in 2010 the cross party consensus on the policy of personalisation was confirmed in the Coalition Agreement and then the Vision for Adult Social Care. Most recently this has been further strengthened by the publication of the Social Care White Paper and draft Care and Support Bill. There is no indication of any shift away from this agenda, given the de-facto political consensus. CVT needs to be clear therefore that this is very likely to be the policy context for the foreseeable future. Recent scandals involving institutional provision, in particular that at Winterbourne View, are likely to strengthen government direction of travel.

Most recently the strong sector leadership partnership Think Local Act Personal (TLAP) has come to represent the clear sector position on policy relating to all people who use social care, including people with learning disabilities. The partnership includes leaders and leading organisations from central and local government, the main provider bodies and people who use social care and families. It links to the national forums of self-advocates and family carers of people with learning disabilities. TLAP has developed the *Making it Real* markers based around what people should expect to find and experience from the care and support commissioned or provided by councils and providers.

## **What are the implications of this policy context for CVT?**

**Externally, there are risks that CVT communities, especially those that are geographically more separate and larger, may be defined as provisions that segregate and congregate people with learning disabilities and therefore run counter to the strong trend of policy and practice. For example, one current commissioner when interviewed expressed concerns about these features and said the model was largely counter to modern policy. This commissioner when asked how some of the larger communities delivered on the personalisation model, said “We’ve discussed it with them but we don’t believe that they understand or embrace it or can deliver”.**

This risk in part emerges from the fact that Camphill communities have not been a part of the mainstream development of learning disability services and supports, have their own unique history and journey and remain a very unusual part of the sector. This very uniqueness can lead some to misunderstand and misinterpret what Camphill communities do. In respect of the more rural, geographically separated communities this can be countered by stronger external engagement and by showing and further developing the personalised features of CVT communities. As CVT looks to its future it can further explore how its special features of community and contribution can be delivered in a range of geographical and support contexts. This is already being successfully done in some of the communities.

Internally there seems to be a range of positions in response to current policy trends and their implications. CVT people understandably take very strong issue with any suggestion that the communities exhibit the features of institutions – arguing that the opposite is the case – one of the main reasons for their establishment was to offer an alternative to the then prevalent societal and professional attitudes that treated people with learning disabilities as sub-human. Some within CVT would go on to argue that the communities offer an exemplar of true personalisation in action, others that they offer an alternative, better, model which focuses upon community and interdependence rather than individualism.

Some of those that make the latter case, base this on views about the merits of Camphill communities and a negative interpretation of personalisation. This interpretation places personalisation within a model of society and disability support that favours a consumer and market approach to quality and improvement. This is rejected by some as antithetical to the Camphill model. In reality of course views within CVT are more complex than this. Some

other voices see CVT offering important features of and contributions to personalisation but needing to go further – not to be afraid of or rejecting the agenda. These people believe that the communities have special things to offer, some things to teach but also things to learn from others.

We agree with this latter position. All of the review team have been part of the drive towards personalisation over the past few decades and a key part of that for us is human scale and human interaction mediated only to the necessary level by external forces. The worst institutional scale ‘services’ have largely ceased to exist but institutional features can clearly survive commissioning and regulatory regimes in modern settings. We have also experienced how so-called personalised arrangements such as those via personal budgets can often remain limited and constrained by bureaucracy and process. It was of note to us that several people we spoke to expressed fear that their community would become a form of regimented place in response to external rules and requirements – we agree this must not happen and are confident that it can be avoided.

To a variable extent across the communities, elements of personalisation have already been incorporated into CVT practice and behaviours – we see this for example in the person-centred planning and quality reviews that have taken place. Many people we spoke to were positive about these developments. They saw a good balance starting to develop between individual needs and aspirations and community interdependence.

In some communities, however, there are voices which are more sceptical and suspicious. There is a risk that in these communities these voices (sometimes speaking for others) will take a more oppositional approach. They may ally with others who are suspicious of modern developments and form at least temporarily powerful defensive forces. We think that such an approach will be self-defeating as it would be characterised by commissioners and others as conservative forces acting against the interests of people being supported. It is also an unnecessary approach as there is willingness on the part of most commissioners to seek an aligned position.

**Our view is that the right strategy for CVT would be to engage with personalisation in a smart way, negotiating and finding ways that its elements can be integrated with and aligned with the work of the communities. We hope that this is what most in the communities will want to do.**

## **CVT and *Making it Real***

As noted above the current gold standard for personalisation is to be found in the Think Local Act Personal *Making it Real* markers of progress for personalisation and community based support. These do not stress individualism or consumerism, but rather on ensuring individual people have full lives and are included in their communities. Because the CVT communities are different from the dominant service models for people with disabilities, it may superficially seem to be difficult to judge them against criteria for personalisation. In our view, however, they must be prepared to review themselves against the markers. This is partly because commissioners and regulators will continue to use these criteria but more fundamentally because this is necessary to protect and promote people's rights to be full citizens in our society. This is not to say, however that personalisation is a rigid concept. There is room within it for different ways of achieving its desired outcomes. This provides an opportunity for CVT and its communities which we believe the charity must take.

### **Strengths and areas for development**

Both the cluster sessions and visits allowed us to identify current strengths and areas for development and we have developed a series of initial recommendations (see below).

Our view is that there is a real opportunity to be built upon to offer a positive and distinctive CVT offer centring on the 'communities' element of *Making it Real*. If carefully crafted this could help preserve the elements of CVT communities which are seen as central and precious while helping key external players – commissioners and regulators, to see value in the offer. At the same time it will be necessary for the communities to accept and in some cases better understand personalisation and to agree further developments.

In this section we offer our views about CVT's current delivery against the main elements of *Making it Real*.

***Making it Real 'I' statements cover the following areas:***

- 1) *Information and Advice: having the information I need, when I need it*
- 2) *Active and supportive communities: keeping friends, family and place*
- 3) *Flexible integrated care and support: my support, my own way*
- 4) *Workforce: my support staff*
- 5) *Risk enablement: feeling in control and safe*
- 6) *Personal budgets and self-funding: my money*

## 1. Information and Advice: having the information I need, when I need it

Information and advice clearly need to be available to people *for a purpose*, they are not an abstract good in themselves. So work in this area needs to build upon a vision for CVT which should express the purpose of the communities. We would hope that what emerges would be a vision that reflects Camphill history and traditions, develops a clear 'unique selling point (USP)' and which frames all these in terms of choice, control, community, contribution and (importantly) inclusion, with clear routes in and out for those who want and can cope with them. There is clearly an issue about people who are settled and don't want a path out and this needs to be addressed and accepted. One possible frame is a 'citizen pathway' possibly one for the whole of CVT and one for each community. This will then provide a clear rationale for providing information and advice as above and go on to answer the question: *In what ways will CVT provide information and advice so it can deliver its vision?*

## 2. Active and supportive communities: keeping friends, family and place

Obviously we need to be clear what we mean by 'community' each time we use the term. On the issue of having friends – almost certainly people are better served by CVT in this regard than by most conventional providers. Evidence from community visits suggests people clearly feel valued, secure and included. They are more confident and have more to offer as a result. CVT needs to celebrate this and not to lose it in the change process. The trust should also explore ways of building on this and might well have something to offer to other providers here.

Currently inclusion of family (parents and siblings) is not good enough across all communities. CVT needs to more strongly value the potential contribution of family. There is evidence of somewhat better relationships in some of the communities. We suggest CVT looks for best practice in these communities and publicises this widely. (See Camphill Friends and Family submission in Appendix C).

**Place.** This is interesting given Camphill's historic feeling for the land and there are of course significant strengths (with improvements possible in some communities). Some commissioners seem to feel rural communities are almost inherently wrong and most people want to live in towns but this is not universal and can be negotiated. Stourbridge and St Albans are good examples of urban CVT communities which seem to be thriving, with most people living in ordinary houses in ordinary streets: Croft has a development plan to sell/reconfigure large houses and move to more

'ordinary small-scale' model. Our view is that there is a need for connection with place and community *wherever and whatever the locale and community* look like: there is evidence of good practice in some communities but also some issues too.

### **3. Flexible integrated care and support: my support, my own way**

There are a number of components of personalisation as it is now defined and understood which are well established practice in some CVT communities. These practices should be publicised and promoted as models of good practice throughout the trust. There are other aspects of personalisation which are less well understood or practiced in CVT communities and which need attention. The issues which we are concentrating on in this section are those which impact directly upon the lives of tenants, the work they do and the say they have over the arrangements for their support.

The components which we see as **largely positive** are as follows:

- **People having a sense of purpose and a valued role within communities:**  
It was striking that many of the people supported that we met throughout our review expressed a strong sense of belonging and identity and a positive association with their communities.
- **People undertaking meaningful work:**  
Much of the sense of value people expressed seemed related directly to the fact that they were able to make a meaningful contribution to the functioning of a working community and that contribution was recognised and valued by all members of the community.
- **People knowing those who are providing their support:**  
Within CVT communities tenants of course know (often extremely well) the people providing their support, as most of that support is supplied by co-workers or by long term paid support workers who live and work in the community. The more difficult and challenging issue is to build this level of trust and familiarity with support staff from outside the communities.
- **Empowering people to have a voice:**  
We met and observed many staff and co-workers who naturally adopted an empowering approach to ensuring that people supported were able to express their views openly and these staff and co-workers were able to encourage and welcome criticism. (However there were also instances where tenants appeared to some

extent at least, inhibited from expressing criticism or sometimes they too readily accepted a consensus that all is well).

- **People pursuing their interests:**

In general tenants did not express a strong sense of difficulty in getting support to explore new things or undertake activities that interested them. This is perhaps something that should be a cause for particular celebration as it runs counter to certain stereotypes of 'village communities.'

In our recommendations later we concentrate on four components of personalisation which we judge to be **working less well** for tenants in CVT communities. **These are:**

- **People being able to choose who they live with and who supports them:**

Which home people lived in was not always a matter of choice but sometimes down to what vacancies may be available at the time. Also in some cases people told us guest co-workers moved into the homes they lived in without them having been involved in the decision.

- **Co-production:**

The mechanisms for capturing, aggregating and using the experiences of people with support needs within communities to inform decision making in communities, as part of CVT's governance arrangements or to inform strategic direction need to be more developed and undertaken more systematically.

- **Doing work of one's choice and getting the right support at work:**

People seem to be often slotted into work-roles based on what needs doing, in part to continue the traditions of communities and with what it is assumed will fit people well. This is not person-centred practice. We observed variable practice in supporting people, but there were a number of instances where it appeared that tenants were not provided with adequate, skilled support to do their work.

#### **4. Workforce: my support staff:**

Reframing the co-worker model and the relationship between co-workers and employed staff is a major issue for CVT addressed elsewhere in this report. The main issue addressed in this section is how the person finds support staff that suit them, in terms of skills, personality etc. A matching process would address the issue in part; but of course not all tenants live in co-worker led houses - some live in shared houses or single occupancy accommodation with no on-site support and all have contact with a wide range of CVT staff/co-workers beyond their home. Key

here is therefore likely to be adopting a proper support planning process around individuals, complemented by some form of 'brokerage' service to help people get what is in their plan, including the right staff. Some of the communities already do something like this and it may therefore be a case of building on/replicating best practice. CVT also needs to consider HR/recruitment practice in relation to paid staff.

#### **5. Risk enablement: feeling in control and safe:**

This is another major issue which is addressed elsewhere and safeguarding within CVT is the subject of on-going intensive review and not a formal part of this review. Briefly for us though, some of the main issues appear to be: need for a clear CVT statement on risk; lack of real connection with (wider) community in some places; lack of robust support planning, incorporating risk enablement and risk management in at least some communities; lack of robust safeguarding policies, procedures and training; lack of sufficiently clear roles and accountabilities where the traditional co-worker model is in place.

#### **6. Personal budgets and self-funding: my money:**

This is another major issue for CVT. Tenants in the more traditional communities have been 'shielded' from the money-economy, very few tenants have a direct payment or know how much their support costs (the same applies to families) and whilst 'meaningful contribution' is seen as very important, paid employment is not. We are clear that untangling this issue requires positive engagement with the Camphill/Steiner world view which privileges spiritual over material achievement and the current 'traditional co-worker model' where co-workers are not formally paid but are placed in a position of trust where they are asked to use the community's money/resources for the benefit of all, including meeting their own needs.

A culture change away from the old trust-based approach should have implications for the management of tenants' funding and finances. One approach would be for all nine communities to move towards an **Individual Service Fund** approach (where there is block contract in place) where the aggregate budget is split between a sum for overheads and a larger sum dedicated to meeting each individual tenant's need as set out in their support plan; or the presumption of a personal budget (where the funding is spot-purchased.) This would clearly require some discussion with funders (and possibly raise issues about Supporting People sourced funding), but we might hope and expect that commissioners would be supportive. We would strongly suggest that CVT consider this at least in the medium term – starting with shorter term testing.

As far as individual tenants (and families) are concerned the critical issues are knowing how much money is available in their personal budget to fund their support and having the means to make real choices in how this is spent. Some communities have taken some steps towards the money economy, particularly the urban communities where people live semi-independently; one rural community (the Grange) has what sounds to be a sensible process for ensuring that people sign-off consent to spend 'their money' on particular group activities. So there may well be other examples of good practice to build on: CVT will probably need to run a systematic training programme for helping tenants learn about and manage money. This could build upon the money support framework already in use in some parts of CVT.

# External context – issues and implications

## General external perceptions

CVT is unusual amongst post institutional models of support for people with learning disabilities, having existed through the period of major change to mainstream services since the 1960s but operating largely separately of these developments. It therefore risks being seen as ‘odd’ and even unacceptable to funders, regulators and potential users. The geographical separation of some of the communities inevitably exacerbates this risk.

As people with a long term presence in the learning disability/social care sector our own general levels of awareness of CVT were modest. In checking with our connections after starting the review, awareness was similarly low and the most frequent responses were that people questioned the appropriateness of the CVT community model in the context of modern policy. Some even went so far as to question our involvement in the review. Most saw the intentional community model as a left-over of the past and held caricatured and somewhat inaccurate images of the communities. In our visits and meetings with CVT communities we found some strategies in place to mitigate these risks in most of the communities and good examples in some - but more action is clearly needed to influence some opinion formers. The current engagements with Voluntary Organisations Disability Group (VODG) and others are a positive start with this. We make some further recommendations below about how CVT can more strongly establish its relevance and communicate what it offers.

## Commissioner positions

We conducted interviews with commissioners involved with CVT in all the main areas of operation. As might be expected there was some complexity and variation of view but also strong themes. The variation was mostly in responses to the different communities. In the majority of cases commissioners views were generally positive but there were some major concerns and exceptions which have big implications for CVT.

Some of the main themes were:

- There was agreement amongst most that CVT communities have a potential part to play in the future of support to people with learning disabilities and that a community model need not be in contradiction to social care policy and personalisation.

- Some communities were seen to fit more easily with personalisation than others – especially the more urban ones integrating more strongly with their wider local communities.
- However, there were mixed views relating to the more geographically separate communities. Some saw them as potentially offering elements of personalisation, and to be able to offer an increasingly personalised experience if prepared to continue to engage with the agenda. Others were seriously sceptical about their ability and willingness to do so.
- For some commissioners the financial position was relatively stable but future issues were anticipated around funding levels for individuals and lack of transparency of community finances.
- All commissioners reported previous, and in some cases current concerns about the provision offered in some communities. For some these concerns were current and significant around safeguarding (discussed elsewhere). The role of CVT leadership and management was seen in all cases to have been a strongly positive, often critical force in responding to these concerns and growing commissioner confidence in the communities.
- Several commissioners also spoke with us about a policy of ‘local services for local people,’ which sometimes results in action to assist people to ‘move back home’ or (of greater relevance in practice), attempts to limit new referrals from outside the local commissioning authority. This issue is a matter of particular concern in one authority where it is compounded by particular concerns about the quality of those services.
- When asked what their response would be to any future demerger of the communities, commissioners for the smaller more urban communities were relatively relaxed so long as they were able to access the necessary supports to remain practically viable. The commissioners for the larger rural communities, however, saw the influence of CVT and its managers as highly positive in supporting the communities’ engagement with commissioner expectations and ensuring the interests of the people with disabilities are best served.

## **We see the following implications of these interviews:**

From a commissioner point of view there is little risk or concern relating to the smaller, more urban communities – they are seen as more easily fitting with modern policy and commissioner expectation and to have management and leadership arrangements that are acceptable. The issues going forward for these communities from a commissioner perspective are most likely to be about handling potential funding challenges, maintaining the quality of provision and exploring new “offers”.

For the larger more geographically separated communities, with stronger co-worker involvement there are potentially greater challenges in meeting commissioner expectations, ensuring long term sustainability and retaining current ethos and approaches to supporting people. Having said this there was some acceptance and understanding that living in these communities could be an acceptable choice that some might make and that for some people this might have advantages. This acceptance was severely challenged however around the issue of safeguarding, and quite strongly around personalisation especially where there are current on-going issues. Our view is that demerger for these communities would therefore present high levels of risk to future sustainability.

In general, commissioner positions offer the opportunity to engage constructively and actively with them in some key areas. CVT should engage explicitly on some issues. These are:

- Engaging positively with commissioners around the things that are ‘non-negotiables’ within safeguarding and personalisation, and how these can be acceptably delivered within a CVT context.
- More proactively developing and communicating the ‘special offer’ that CVT can make in delivering personalisation.
- Further engage with commissioners and regulators around the other formal expectations placed on the support provided by the communities in order to agree how these can be best incorporated into practice without doing significant damage to the ethos and working of the communities.

A further implication emerges from the important perceived role of CVT managers for commissioners. It is clear that there are strong differences of views about the future of some communities between some co-workers and families and CVT management and trustees - sometimes expressed in very strong terms. Some critical of CVT management have suggested that their interventions have caused damage and that they have responded too

slavishly or in over-reaction to commissioner expectations which they should have resisted or negotiated more strongly to protect the ethos of Camphill from risks presented by commissioners and regulators.

However, our engagement with commissioners suggests a much more complex and largely opposite reality. In some cases we believe there were serious risks of decommissioning or ceasing of placements in some communities prior to the involvement and intervention of CVT managers. While we understand anxieties that many clearly have about holding on to what is precious about the communities, the interviews suggest to us that it would be highly counterproductive to remove CVT and its managers from the engagement with commissioners. Indeed we would suggest that the best approach for those wanting to mitigate and negotiate what they see as negative impacts of external funder and regulator expectations would be one of positive engagement. If those co-workers and families who are angry, vocal and active decide to take a fundamentally oppositional approach to CVT and commissioners (or either one of these) our prediction is that the results will be largely the opposite to those hoped for.

It is worth adding that our consultations with colleagues with experience of the international Camphill movement suggest that in many other parts of the world a positive and indeed warm relationship with funders is evident: we know of nothing in the English social care system to prevent such healthy relationships developing here.

## **Safeguarding**

**Detailed consideration of safeguarding is not part of the current review and we understand that CVT is seeking specific advice in this area. We are, however, aware that CVT has faced or is facing a number of significant issues. Effective safeguarding arrangements are clearly not negotiable for regulators, commissioners, trustees and managers and it is clear to us that co-workers will have to be clearly and quickly brought into accountability systems. How this is done is open to discussion and it may well be that co-workers can offer helpful ideas about this.**

However, our discussions with commissioners in the context of recent alerts and investigations indicate that for some communities in particular this issue has become a critical risk factor. We believe this will lead to a significant possibility of de-commissioning in some areas and presents severe reputational risk for CVT as a whole if it is not resolved quickly. Resolution would, we believe go beyond acceptable management of specific

situations. Commissioners (and regulators) will need to be confident in the on-going risk management and accountability arrangements. This confidence is not currently present for some. **CVT needs to request specific recommendations from its consultants and take early action on these.**

## **Funding and sustainability**

**CVT finances and financial modelling have not been part of the review brief. We would note several things however. With tightening eligibility criteria and reducing resources for commissioners there must be a risk that people with the level of need of many of the people supported by CVT would not be funded, or not to a high level, if assessed. CVT will need to demonstrate clearly its added value to commissioners and self/family-funders and will need to consider supporting people with a higher level of/different needs and to offer a wider range of provision. Some communities have started to explore ways of diversifying their provision in the future. This needs to be built on, and where necessary invested in.**

Changes to the needs of people being supported will have significant implications for the skill-set of the workforce and for recruitment which will need to be considered carefully in business planning.

CVT will also need to demonstrate a higher degree of transparency in how funding is utilised to support individual community members – something which the current model of co-working, with its relatively opaque model of remuneration, makes particularly difficult.

There seem to have been improvements in management of individual people's finances in recent times. However community finances do not appear to be sufficiently transparent and we anticipate this will be increasingly challenged by commissioners. Also of importance here is the financial relationship between individual communities and CVT. Some of the struggles around what level of autonomy communities have in respect to CVT have an important financial dimension to them. In Taurus Crafts in particular the success of the business has become a focal point for tension. Again our view is that for Taurus Crafts to move away from CVT would be damaging for the reputation of those local communities and for CVT as well as setting an unhelpful precedent for the future growth of CVT as a whole. That said, the particular experience of Taurus Crafts as a thriving social enterprise offers some important potential for learning about how social enterprises could be further nurtured and how the role of supporting people with disabilities within those work environments needs to

work to ensure people are well matched to the working roles they fill and receive appropriate support.

Although personal budgets are not impacting on CVT significantly at present, the current policy and legislative direction suggests they will within the next few years. If people are placed with a community and hold a personal budget they may wish (and should be able) to use elements of this budget with other providers or to pursue personal interests etc. In this context, CVT will need to work towards a model where they understand the core and shared costs of someone's support, including management and other costs, so as to identify the hours or money that people can have within their individual control. As suggested above we recommend serious exploration of the Individual Service Fund model.

## Internal context – issues and implications

### Retaining what is precious in a changing world

We asked versions of the question “What is precious and must be retained?” during our visits and in interviews and received submissions which focused upon this. Our aim was to help consider what important features need to be kept and protected as trustees move the charity and its communities forward. We received a range of responses but some significant themes emerged.

For some people there was strong sense of risk and threat to Camphill traditions and ways of running communities from internal and external changes and requirements. Others were more confident that the things that made Camphill/CVT special could be protected and further developed in a modern and developing context. Debates around this issue, and its association with the co-worker model are one of the primary sources of tension and conflict within CVT at present. **It will therefore be very important to discover what CVT people can come together around in order to build a modern vision and collective strength and motivation for the future.**

The strongest theme which emerged from our discussions was the importance of **deliberate and focused creation of accepting communities which promote an environment that allows people to feel belonging, develop their individual identity, contribute and be valued by others with respect and dignity.** Another feature of this community building often spoken about is that it helps develop **well-being through attention to all aspects of life.** Linked to this theme was a concern not to be simply a traditional service provider or see the relationship with people supported as primarily a transaction where narrow outcomes are purchased at an agreed price.

In a context of considerable tension on some issues we strongly urge those concerned about CVT’s future to use these core things that they can agree upon as the basis for progress. The review team found considerable success is being achieved and believe they can form a strong basis for internal purpose and external offer going forward.

Beyond this generally agreed purpose people stressed other elements which they either saw as critical to the identity and purpose of the communities, or needed to be in place to maintain these. Not surprisingly, some focused on the historical foundations, philosophies and principles of Camphill communities emerging from their origins. The thinking and guiding principles of Steiner and Konig and of Anthroposophy were prominent for some.

Spirituality and for some Christianity, or Christian principles were important for some. The term 'spiritual striving' was used by several people we spoke to.

More contested were views about whether some of the traditions of Camphill and a co-worker model are critical to the maintenance of what is core to communities. Some felt strongly that they were - that the building of community depended on learning and experience of key Camphill philosophies, principles and methods gained over years within a co-worker tradition and using the Camphill family living model. People holding these views often felt that there had been an erosion of these key elements across a number of the nine communities and thought that some of these could not now be considered to be Camphill communities as a consequence.

Other respondents felt differently or had more complex views. The submission that we received from Camphill Friends and Families (see appendix C) captures some of these nuances very well. The group submission clearly sets out a positive acceptance of developments in policy, good governance, management and personalisation while strongly arguing for some key elements to be retained within adapting and developing communities.

To summarise, Camphill Families and Friends called for retention of “intentional community”, the “Camphill Household Model”, a continuing significant role for co-workers and maintaining CVT as a values driven charity. Accompanying this call, however, was a welcoming of personalisation and its benefits, agreement that other forms of supported accommodation should be available within communities, a call for a wider definition and concept of co-worker adapting to modern circumstances - and suggestions about how to ensure the values of recruited workers. We found this to be a particularly thoughtful and helpful submission as it considered ways of retaining what the group see as very important features while valuing some changes and reflecting on how CVT can survive and thrive in a changing world. As our report and recommendations suggest, this kind of thinking will be crucial going forward.

In reflecting on these issues we found the analysis by Andrew Plant (2008) *Communities in Transition – Change and Development in the Camphill Communities in Scotland* very helpful. Reviewing the history of UK Camphill Communities in the context of research on the development of intentional communities he identifies three developmental phases: The pioneer phase, the organisational phase and change and transformation. He considers internal and external changes that take place within communities and the wider society within which they exist and how these interact. He suggests that internal changes to communities and their people – their lives and expectations - are at least as important as the

external environment in leading to change. He proposes that is not desirable or feasible to take a resistant or defensive approach to societal changes. Rather Camphill communities should seek to keep developing and improving, bring the best of the past into the future and positively engage with and influence the 'outside world'.

As with any community or organisation, CVT's current situation and culture is an artefact of many things including history, guiding philosophy, leadership (past and present), economics, policy, commissioning, regulation etc. In our visits and consultations we saw dynamics consistent with a period of rapid and often confusing change resulting from both external and internal forces. This is impacting on people in different ways and now coming to a crisis point and requiring resolution. In all of the communities we encountered anxiety, confusion and sometimes anger when people talked about the past, present and future of their communities. The basis for these anxieties varied and what people were looking back to or forward towards was different across groups and the communities. Despite these concerns many people are finding great value in the communities and determined to make them work well for their members.

It was very evident to us even on brief visits to all the communities that there is at present no single coherent model or powerful guiding philosophy that animates all of the communities equally. This presents significant issues for any attempt to retain a single identity based on Camphill history and philosophy.

**The diversity of the communities is very evident along a number of dimensions:**

- Urban/rural
- Co-worker led/professionally managed/hybrid
- Stable/changing/changed
- Commercial/non-commercial
- Diverse expectations from different commissioners
- Different management styles

We found significant levels of tension and sometimes conflict within some communities and in the relationship between some groups and CVT management. It appeared to us that these sprang from a number of sources.

### **There are systemic tensions around:**

- Central control/local control
- Autonomy/accountability
- Outward facing/inward facing
- Co-worker led/professionally managed

The conflicts and confusions we found were not untypical typical of an organisation in transition - though the people experiencing these problems often feel they are unique to their own situation. This perception often leads people to look for simple and sometimes single causes and to get caught up in conflicts with dysfunctional outcomes.

Our view is that although it will be difficult to manage these tensions, they must be resolved, and relatively quickly in the interests of the sustainability of the communities and of the well-being of people living in them. From speaking with people and reading many papers and reports the issue are now of quite long standing. It is time for strong and supportive leadership to take clear, phased action.

### **The purpose of communities**

**A tension for many of those we spoke to – especially co-workers was that between intentional, shared living in a community setting and providing a commissioned service to people supported. Several contributors to the review described the purpose of the community as much more than supporting/caring for people – including caring for the land and “spiritual striving”. We are aware that this is a major issue for CVT and in particular for many co-workers. People we have spoken to and many of the papers we have read have wrestled with this question. *To what extent do the communities have a fundamental purpose beyond supporting disabled people, to what extent are these wider goals vital to the experiences and outcomes for people with disabilities?* The issue is debated in the minutes of many meetings, including those of the Board of Trustees. In terms of primary focus CVT also has to acknowledge charity law and charitable purpose of course.**

Our view is that while there is much scope and opportunity for CVT to consider how the community, contribution and spiritual elements of Camphill’s history and ethos can be represented and manifested in how it operates, the question of primary purpose must be resolved.

**Where CVT receives a fee for people living in the communities and in the context of legal duties on local authorities and systems of regulation, support cannot be voluntary.** So for CVT there is responsibility to support people, help them stay safe, etc. So far as co-workers are concerned, they make a contribution and they receive benefits. These benefits are in significant part based upon the income for commissioned people. They must therefore operate clearly within an accountability framework. This does not mean that CVT should not consider well-being in the round and the features of intentional community that enhance this. It does mean clear understanding that CVT exists for its beneficiaries – people supported. Because CVT has some other sources of income, land and other assets it is possible to supplement or add extra value – and this can be used as a USP for CVT.

## **Co-working**

**Central to how Camphill communities have run has been the intentional, 'shared lives' model, with non-disabled co-workers and in some cases their families, living and working alongside people being supported. Within the nine English CVT communities, the co-worker element of the model has weakened and in some cases disappeared. In a minority of the communities co-workers are still a significant part of the running of the communities, in others there are very few or none remaining. In all communities we saw a mix of co-workers (long term and temporary) and paid workers (some focused on care and support, some on craft and commercial activity). We heard a range of views about the likely future for co-workers, who in all cases felt under some degree of threat.**

We attempted to understand why this model appears to be declining in most communities. Some we spoke to felt that in the modern world, fewer people were interested and prepared to live in this way and therefore the supply of longer term co-workers was dwindling and would eventually reduce to an unsustainable level. Others felt that external challenge, reflected by the requirements of commissioners and CVT management, was making the role increasingly unpalatable. This was often presented as service expectations taking over from intentional or vocational motivation. In practical terms it was characterised as moving from living and being with people in a mutually supportive way to a commercial and formal contractual relationship requiring large amounts of evidence and formal accountability. This was seen by some to be taking time away and detracting from human relationships and spontaneity and putting the essential essence of the communities at risk.

Not everyone we spoke to mourned all these changes however. In some cases people were even relieved that particular co-workers were no longer part of their community - seeing them as previously dominant and in some cases exploitative of their roles. Some preferred a more typical model of paid workers providing support and service albeit with an untypical offer that puts a premium on contribution and community. Some of these people felt that groups of co-workers had too often assumed control over communities and did not always live up to the philosophy of all being treated equally. These people were of the view that CVT communities could go forward without co-working and retain the ethos of community and contribution which was no longer dependent on the presence of co-working.

Commissioners sometimes saw a potential future for co-workers but not all were confident that communities primarily led by co-workers could accept necessary changes.

Co-workers that we spoke to were not in full agreement about what was special about the approach – some referred back to first principles and philosophy, others had a more tangible practical way of describing the elements and benefits. Some were more towards the end of the continuum that felt the communities should be primarily run by co-workers, others more happy with a hybrid approach so long as the primary ethos of the communities were preserved via a significant presence of ‘non-paid’ people. Some referred strongly to aspects of the community that were not directly about supporting people with disabilities - sustainable farming etc. The written submission to the review by the Camphill Friends and Family group (Appendix C) neatly captures these dilemmas and the balance desired by some.

## **The future of co-working**

**The view of the review team is that a ‘traditional’ co-worker model is not sustainable going forward. Notwithstanding the issues about continuing supply it is not tenable to operate a model where those playing significant roles in the lives of people using commissioned support are not operating sufficiently within an accountability system. We understand there may also be issues about financial viability though we were not asked to explore this in detail.**

In addition to general accountabilities we heard from a number of people about concern in some communities regarding the reward system for co-workers. With this in mind and taking on board the accountability issues above, we take the view that CVT needs to review the financial arrangements for its engagement with co-workers. We have been made aware in this regard of the so-called ‘co-worker pot’ model, which we understand has been trialled in one community and we have been provided with background papers which describes the

model in detail. Our understanding is that this approach identifies a fund ('a pot') which represents and reflects the work co-workers carry out; it then provides that 'co-workers would be free to decide how to use the monies...to work with the principles identified within the Fundamental Social Law. They would be free to decide whether to use the monies solely for their own needs or to use some of the monies to support the community as a whole or individual members of the community in need' (from 'The Co-worker Pot approach' paper supplied to the review team). Our recommendation is that the trial of this model is reviewed, its merits and demerits identified and a report prepared: the key question is - *is such an approach useful, and if not how might its aims be achieved otherwise?*

Having made these points we have considerable sympathy with the aspirations of many of the co-workers we spoke to and understand their strong sense of risk to cultures and communities that have been built over decades, have clearly had many positive results and could be quickly lost. Our team reflected on our personal family lives and some of our professional experiences. Commissioning and regulation come at a price. Too often, those things which are established in theory to benefit people do not do so, or mostly benefit organisations and demonstrate public accountability rather than enhance people's lives. It is important, therefore, to look for a good solution to this challenge.

**So what is the future for co-working? There are three main theoretical options with various permutations (and also issues of financial viability will have to be explored in making decisions)**

1. **Operate a full co-worker led community model** (in those communities where there are still significant numbers) with CVT providing mostly support functions. The main advantage of this approach argued by its proponents is that these communities could take charge of their own destinies including responsibility for aligning with external expectations. The main risk (which we think would be very high) is of external rejection in the short to medium term by external commissioners in particular and potentially also by regulators.
2. **End the co-worker system.** The main advantage of this approach would be to set up a more conventional system of governance, management and accountability. The disadvantages could include: damage to existing relationships and communities (more in some areas than others); possible short term risk to sustainability in some communities and a loss of a significant part of what makes CVT's offer unique in some communities.

3. **Adapt the co-worker system** enough to accommodate key accountabilities but retaining some elements critical to achieving the special positive characteristics of some communities. The advantage of adapting the model would be to increase the chances that CVT will be acceptable to commissioners and regulators in the future and reduce the risks related to lack of clear accountability. The main advantage of retaining an adapted co-worker system as a part of the mix of support at CVT would be to increase the chances that CVT could retain one feature that makes it different from most provision and is valued by a significant number of people and families. Key risks are that some co-workers may immediately reject this option and leave the communities or that an acceptable adapted model might be impossible to develop.

We recommend that CVT explores option three. We think that CVT should make an attempt to retain co-working at least in some communities. Whether this is successful will in significant part depend on whether co-workers can see the benefits and are able and willing to make the changes required. We hope most will. If not CVT will need to gradually replace co-workers with employees while making all efforts to retain the things all agree are important about the communities.

The closest parallel to the CVT co-worker model in mainstream social care is Shared Lives arrangements (formerly called adult placement). These usually involve a disabled or older person sharing family life with 'shared lives carers'. Shared Lives operates on a relatively modest (although growing) scale when compared to residential care and supported living and has wrestled with the concepts of independent living and personalisation. Although the parallels are not exact, Shared Lives schemes have been successful in developing a model which is acceptable within a mainstream commissioning framework, has a clear reward and accountability framework and agreed processes (including matching), training and standards. We think there would be merit in engaging with the national network organisation Shared Lives Plus to take advice when developing an adapted co-worker model.

## **Governance and management**

**CVT has in place a relatively complex governance and management system which appears to have developed in an incremental way, in response to internal dynamics and in reaction to events. This is not unusual. We have heard and read varying views about current arrangements, their genesis and adequacy.**

Some have expressed concern that CVT governance and management has come to take on a much greater, more pervasive and controlling role that was originally envisaged. For these respondents to the review, the charity was established for pragmatic reasons to provide various legal and financial protections and support functions to essentially autonomous communities. For some **there is a perception** it has since exceeded this role, taking on de-facto control of the communities and putting in place a growing and expensive management and set of specialist functions for this purpose. In this view of events, this management tier has greatly added to CVT costs, threatening sustainability and interposed itself unhelpfully between the communities and their local commissioners. It has imposed time-consuming and rigid expectations and rules which run counter to community traditions in an over-reaction to the expectations of commissioners and regulators. This is also seen by some to have been done in an overbearing style.

However, other contributors to the review have offered a very different set of views. They see the role of the board as having formal responsibility for the charity and seeking to discharge that responsibility in a way that attempts to introduce the necessary accountabilities while respecting traditions as much as possible. Some see powerful and angry resistance in some quarters to reasonable changes that are required both by regulators and commissioners, largely in the interests of people supported and which if not taken forward threaten the long term existence of some communities. They see the role of managers in this being to mediate and manage this reality on behalf of trustees, people supported, families and the 'workforce' of the charity. Additional management and paid workforce have been necessary to make up for capacity and skills deficits in the communities. As noted above, the views of commissioner interviewed suggest that they see CVT playing a key mediating and management role in the context of previous and current serious concerns. **The review team share the view that effective and accountable management systems are vital and are clearly playing a key role at present.**

A continuum of sometimes polarised views such as this is a common feature of an organisation in the kind of transition being experienced by the CVT communities. Such a transition is very difficult for a Board of Trustees to manage and this is reflected in minutes

we have seen and comments we have heard from trustees and others. In some respects the position could be described as ‘stuck’. In our view this is not a position that is sustainable. There are short and medium term risks facing the charity and its beneficiaries requiring decisive and timely action. In our view, in a modern context there is no alternative to the formal leadership of an organisation taking responsibility for the resolution of risks and the making of positive progress. This can be done within a participative framework and we strongly recommend this in this case – but there needs to be no doubt about roles and leadership.

In our view, the board now needs to adapt and rationalise governance and management arrangements in response to the findings of this review in order to move forward decisively and with confidence. **Three main developments are needed:**

**First**, in respect of strategic governance, it appears to us that the Board of Trustees is insufficiently independent of internal interests. Although we have seen evidence that the Charity Commission has explicitly accepted co-worker trustees, in our view it is inappropriate for such trustees to have a special and powerful place within strategic governance. We would ask also why other sections of the “workforce” and people with disabilities do not have representation. The special status of an internal interest group on the board may act to inhibit decision making which may be necessary in the interests of the main beneficiaries. Similarly there are risks that the board may be inhibited from taking decisions warranted by its external context to ensure its future sustainability.

To be clear, we are not suggesting that this must be the case, however it is a significant structural risk which may well limit the board’s ability to take necessary and timely decisions and we therefore recommend changes to increase board independence, (see below).

We also suggest that the board’s ability to respond effectively in the interests of beneficiaries and to a changing external context would be improved by co-option of some new trustees able to more strongly represent that external environment, in particular personalisation, commissioning and the likely needs and wishes of a younger and more differentiated group of beneficiaries. We believe this would help the board to be well prepared and responsive to changes and offer a balance with those upholding the values and traditions of the trust.

**Secondly** - there are currently different management and governance arrangements in place across the nine communities. Some are referred to as 'managed communities', some as 'co-worker led'. There are a range of community based decision making forums. In our view it is unsafe for the trust not to have general management arrangements in place in all communities within an accountability framework through to the CEO and board. Without such an arrangement the trust places itself at significant risk in respect of regulatory and commissioning requirements. Having made this point we are not recommending a rigid, over-centralised structure. We believe it possible to develop an accountability framework while retaining the maximum reasonable local decision making which engenders local responsibility and responsiveness to local issues. Within a renewed framework for local decision making, however we believe the voice of people with disabilities should be much stronger than at present and that opportunities for engagement with families and other employees should be strengthened.

**Thirdly** - as is often the case in organisations going through rapid change, a range of posts are created in response to circumstances, and that has been the case for CVT – person-centred planning co-ordinators, communications, HR, social workers etc. We do not suggest that these posts are unnecessary but that as part of the proposed visioning and development planning, CVT should determine which functions are called for going forward. We believe it is likely that strong communication, HR, business development/support and training functions will be needed during a transition period.

## Conclusions - achieving a positive future

**There are a number of possible futures for CVT. There is a gloomy scenario that in the absence of sufficiently committed, collaborative and decisive leadership across CVT, the different interests and views cannot be reconciled and current conflicts escalate with major damage to all. We believe this can and must be avoided in the interests of the beneficiaries. We propose that trustees lead a process of re-visioning and development planning to move the charity towards a confident future. This will require decisive and skilled leadership.**

The vision would set out a clear 'high level' set of elements that make CVT distinctive and action would be taken to sustain and strengthen these while allowing an agreed level of variation at local level. This would serve both an external and an internal purpose. Externally it would allow CVT to present and promote itself coherently to people who may consider living or working in the communities and to commissioners. This collective identity could focus on the common features and goals we saw across the communities and which make CVT in some respects distinctive from other organisations. Internally such an approach could form the basis of an acceptable 'deal' for the various interests and groups to come together, finding sufficient common ground while accepting variation.

It is clear to us that within this 'deal' there needs to be an appropriate blend of management accountability and local decision making. Co-workers and in some cases local managers will have to be prepared to accept and work within a management structure that guarantees the central accountability required to meet key commissioning, regulatory and policy requirements and to ensure financial stability, and quality. We would strongly encourage trustees and national CVT management, however, to develop management arrangements that ensure that key elements of the Camphill ethos are sustained including a reasonable level of community autonomy and decision making. This should include a significantly stronger voice of people being supported. Getting this balance right will be crucial and difficult.

In the recommendations section below we suggest key elements to be incorporated within the proposed vision and development plan for CVT. Equally important, however, is **how** such a process takes place and the appropriate phasing. We do not think it appropriate to try to go forward with all actions at once. Trustees (we suggest with advice) should agree some key first stage actions that are urgent either to reduce serious short term risks to CVT or to put foundations in place for on-going development. Other actions should take place over a

longer time frame, allowing measured consideration and the necessary participative approach.

We suggest trustees should act to create the best conditions possible for this visioning and development planning. This will be difficult given the fierce debates over some important issues. It will require clarity about what is negotiable and what is not, very good communication and a good systematic process of engagement and involvement.

# Recommendations

## Planning the future

1. Led by the Board of Trustees, **a new CVT vision and five year development plan should be developed**. This would have both an internal and external purpose. It would aid the charity by constructing a 21<sup>st</sup> century vision and mission for CVT, address its key internal and external challenges and help build energy and motivation around a coherent purpose. It would form the basis of CVT and local community planning for the future. Externally the plan would demonstrate to regulators, commissioners, the social care sector and people who may use its supports that CVT and the Camphill ethos has a clear relevance in a 21<sup>st</sup> century context. This would include how CVT can deliver *Making it Real*, and how person-centred practices and approaches such as Individual Service Funds can be used to achieve this in practice. Given the nature of this task and that some of the important issues are highly contested, we suggest that CVT should consider working with an external partner(s) over perhaps two years to support development and delivery of the vision and plan. We further recommend use of the approach *Working Together for Change* to help construct the vision.

### Key elements of this plan should be:

- A **vision and mission** for CVT – setting out the fundamental purposes of the charity and how a Camphill ethos will be delivered in a 21<sup>st</sup> century context.
- National and then local community development of a **clear and coherent CVT ‘offer’** which can be used to build internal coherence and confidence and to engage with commissioners, regulators, future community members, potential staff and co-workers and support fundraising. This offer would need to have overall, high level unifying elements and also differentiate with different specific offers for the individual communities.
- **Governance and management** arrangements nationally and in the communities (see below).
- National and community specific arrangements to **further develop personalised support** within a Camphill ethos (see detailed personalisation recommendations).

- **Strengthening of functions** needed to support developments during transition (e.g. communications, HR, business support, training and development).
  - Options for **diversification** and development of the supports and services CVT and individual communities offer, based on a review of internal possibilities and engagement with commissioners on future commissioning intentions. Consideration of the financial and other investments needed to make the necessary shifts.
  - **Community by community plans** based on work undertaken between CVT trustees and managers and community stakeholders (people supported, workforce, families) with local commissioners to seek **alignment between future commissioning intentions and a developing CVT offer** – and then the development of appropriate CVT and community business plans.
  - **Adaptions to co-working arrangements** in those communities where it is retained (see below) including setting out how co-workers, paid staff and managers can align their roles. The linked development of a strategy to attract future co-workers to these communities based upon a positive offer.
  - Setting out ways that communities within CVT will **support and learn from each other** including the role of co-workers in helping to maintain a Camphill ethos beyond their own communities.
  - A **strategy for effective on-going communication** between CVT trustees, managers and communities and across communities.
2. **The board should establish a strategic group, led by the chair and the CEO to put in place and implement the CVT vision and development plan.** This group should recommend the key decisions necessary to ensure positive progress for the charity. **An outline plan should be developed quickly** – we suggest within four to six months, but then developed further and adapted following the conclusion of the cross-CVT consultations.
3. **A phased plan.** It is both a strength and weakness of CVT that it is highly reflective. This quality allows it to consider decisions and issues carefully but can also lead to lack of timely decisions on important issues. For this reason **the process of vision development, planning and action should be staged and phased**, allowing some important decisions to be taken quickly while allowing longer for careful debate around others. In these recommendations we offer suggestions about this phasing, though detailed decisions will need to be taken by trustees.

4. As a crucial part of the visioning and planning process **trustees, managers, people being supported, families, co-workers, and employees should have direct opportunities to be engaged in discussions about how CVT and individual communities can move forward positively.** This process should be conducted in an open and respectful way, allowing the expression of all views and accepting that there may be strongly differing ideas. It should be facilitated, however, to help these debates to take place in an atmosphere of mutual respect and lead to positive outcomes. As part of this process it will be important to be honest and clear about some non-negotiables. It may be necessary to:
  - **Clearly communicate** the issue of ownership and responsibility for the direction of the trust. This must clearly rest with the Board of Trustees.
  - **Re-state and communicate the primary purpose of CVT** internally and externally - to provide support to and enhance the well-being of people being supported.
  - **This communication**, however, should emphasise the continuing importance of the Camphill ethos, an appropriate balance between local and central decision making and ways that communication between trustees and communities will improve to ensure that central decisions strongly take into account local issues and circumstances.
5. **The findings and recommendations of this review should be used as the framework for the community discussions. This might be done over a period of perhaps six months.** It will be important, however, that the main findings are communicated quickly and effectively to reduce anxiety and risk of misunderstanding and **a clear communications strategy should be put in place to achieve this.** This should include direct face-to-face meetings by trustees and managers with communities and those connected to them. It may well be useful to include the report authors at some or all of these meetings. It is inevitable that aspects of this review will be communicated outside of CVT and therefore we also recommend that an external communications strategy is developed.

## **Governance**

6. **A reasonably rapid review and development of governance** should take place. Some key developments should be:
  - **Development of the Board of Trustees** to ensure a clear continuing majority of independent trustees able to act clearly in the interest of beneficiaries and allowing decisions and action to be taken quickly and

shifting from the current sometimes 'frozen' position. A majority of fully independent trustees should be complemented by the minority presence of trustees who can represent important CVT interests. This should include an opportunity for people with disabilities as well as co-workers and families to be represented within governance.

- To support development, CVT should look to **appoint new trustees** with current significant involvement in commissioning and personalisation.
- Allocate **trustees to be a key link between the board and nominated communities**. These trustees, alongside relevant managers, should act as a key on-going point of communication between the board and individual communities (including families). They should regularly visit the communities and alongside relevant managers, receive views and representations.

## Management

7. **Develop operational management arrangements to ensure an active general manager with clear responsibilities and accountabilities for all the communities** including the current co-worker led ones, reporting into a senior management team and CEO.
8. **Review management arrangements across all communities in order to ensure an appropriate balance between national management and accountability to the Board of Trustees and local scope for decision making.** The aim should be to ensure that maximum appropriate local decision making is facilitated where possible but within a strong and clear framework of accountability on key issues of finance, personalisation and risk. Some different arrangements are likely to apply for different types of community and every effort should be made by management to negotiate and develop these with local employees, co-workers and people living in the communities. Within local arrangements there should be a much stronger systematic voice for people with disabilities and further developed communication with their families.
9. Consider the **appropriate balance of staffing and other support resources** in the communities to ensure that key elements of the agreed vision and ethos are maintained and that roles across co-workers, paid staff and managers are clear and coherent.

## Safeguarding

10. **Trustees should urgently request a set of recommendations from the current safeguarding consultant**, commit to put into place any necessary short term measures and take timely action to incorporate other recommendations within the early stages of the development plan.

## Co-working

The future of co-working has been the issue of greatest debate during the review. The recommendations below try to offer a way of retaining co-working in some communities while making adaptations which may allow it to survive in the medium to long term. We have considerable sympathy for the view that an 'unpaid' vocationally driven contribution can add something very important to the ethos and outcomes of some communities and for the key historical role played by co-workers in establishing the communities and protecting their ethos. We understand that the suggestions below are likely to be contentious for some but offer them based on our genuine assessment of the situation, and in particular the external context. We fear that if they are not adopted the likelihood of co-working surviving in CVT beyond the short term is low.

11. **In close consultation with existing co-workers, develop an adapted co-worker model for use in those communities where co-workers still form a significant element of the community.** This is necessary to ensure the continuation of co-working in some communities in order to maintain the benefits they are perceived by many to bring as part of the Camphill ethos in some communities. CVT needs to evolve the role of key workers so that they can play a role in helping maintain and translate Camphill traditions and ethos to deliver the new vision, including in those communities without a significant co-worker presence. Care should be taken here to evolve a model that retains as much local community decision making as possible while allowing trustees and managers the levels of direction needed for good governance and providing commissioners with confidence that public funding is being used appropriately. CVT needs to start the discussion about co-working from what the communities are trying to achieve and the various forms of 'workforce' that can help achieve this. This would allow the development of a **different conceptualisation of co-workers.**

12. **Key changes to the co-worker model should:**

- Bring co-workers clearly into an accountability model which reduces risks and helps ensure good practice in support.
- Make community/co-worker finances more transparent and accountable by developing an agreed reward structure.

13. We recommend taking advice from Shared Lives Plus when reviewing and adapting co-working

### **Specific community issues**

14. As by far the largest community and one where there is currently a significant level of unhappiness (at least among some co-workers and families) we suggest that trustees and senior managers engage urgently with Botton. They need to make it clear that CVT wishes to develop stronger relationships with families and co-workers with the appropriate level of community based decision making. However, this must be within a framework, which has core accountabilities, personalised approaches, community inclusion and helping people stay safe at its heart. Our view is that an approach of this sort is needed to find acceptance with commissioners

15. The three Gloucestershire communities are ones around which there is also a degree of very real contention and divergence of view. We see significant commissioning risks. The three communities are of course very different, and the challenges they face are not identical, this notwithstanding their relative geographical proximity (and a degree of interchange of personnel and of people supported.) **Our suggestion is that as an early part of the wider visioning and planning exercise, the ethos, rationale and direction of the three communities is reviewed and a clear direction of travel agreed, either as a group or individually.** This exercise needs to include commissioners at an early stage.

### **Personalisation**

16. **Trustees should formally and publically (in the new vision) embrace the concept of personalisation** and commit to building on some existing good practice to further develop its delivery within CVT communities and within a Camphill ethos.

17. **As part of the proposed CVT visioning and development plan a phased programme of activity should include:**

- CVT should immediately declare its intention to **register and commit to take action on the Think Local Act Personal *Making it Real*** markers of progress for personalisation and community based support. Following the first stages of the

proposed CVT development process it should then incorporate MIR self-assessment into the planning. We have made detailed initial suggestions below in Appendix A

- CVT should use this assessment and recommendations alongside local application of ***Working Together for Change*** at community level. This will ensure that people supported play a lead role in determining how personalised services will be delivered in each community in the future. This will ground CVT's work in a solid foundation of coproduction and enable the organisation to demonstrate how its communities can deliver distinctive and valuable contributions to personalisation on an ongoing basis.
- CVT should invest in **building capacity in using person-centred practices** to deliver personalisation and ensure choice and control on the ground, for example people (including co-workers and managers) having one-page profiles.
- CVT communities and managers should **engage explicitly with local commissioners** in order to discuss, take advice and agree how the communities are/can deliver personalisation within a Camphill ethos (see above).
- CVT should **build on its existing links and connections to the wider sector** – in particular taking full advantage of its membership of VODG. This should be used both to ensure access to practice and learning, but also to demonstrate to the wider sector that CVT considers itself to be a positive and engaged part of the sector.
- Over time CVT should **engage with other disability organisations** in order to share and promote ways of supporting people to develop community and engage people in making valued contributions.

## Appendix A: *Making it Real*

### Information and Advice: having the information I need, when I need it

- A right to information and advice should be included in a charter (information for individuals and for families). The purpose of providing information would be to help people expand choices available; to make person-centred plans; and either to move on, or to achieve what they want in situ. We suggest a right of redress or appeal if people are not assisted to access the information they need.
- Information to be provided in timely manner and in a way which suits each individual, so needs to include:
  - Online information
  - Printed information
  - Consider a new information and advice service/post with advice line and/or occasional surgeries on the nine sites. Information needs a significant local element, so it may be best to split this service into three clusters (Gloucestershire, Yorks, other communities?)
  - Information should be linked in to support planning processes around each individual, so information is provided to help the person/family plan and to get what is in the plan. (See also comment in section below on brokerage).
  - Information provided needs to reflect both purpose (as expressed in a charter, building choice and control - or however this is framed) *and* realities for CVT residents (so: we believe more people in CVT communities should be able to get paid jobs or set up small businesses, hence they need information and advice on how to do this, where to get training locally, where are good adult education courses etc; also the population of the communities is ageing, what options are available locally to help older people including those with learning disabilities? And CVT should also consider how to make sure this information reaches tenants in ways that they can use. At this stage, CVT should make no assumption that people will necessarily stay with CVT for life nor that they will move on.
  - Information needs to include signposting to specialist information providers in local communities, so the new information and advice service will need to have an information brokerage function at its heart.

## Active and supportive communities: keeping friends, family and place

- Celebrate and nurture friendships as part of community life. This may need to be part of Vision discussions (*'people have the right to be included and to be given the opportunity to make and keep friends'*) perhaps but CVT needs to be careful not to define away the conditions that create natural friendships in the first place, (Camphill communities are good places to make and keep friends: the last thing needed here are 'befriending schemes'.)
- Include families. Work with Camphill Family and Friends to investigate ideas and current best practice on including and making the most of contribution of families and friends. We suggest a survey of all families as a part of the exercise.
- Review 'community connectedness' in each of the nine communities. How this is to be done may need researching but something quite formal and structured, with input from staff/co-workers in each house in each community. To include: basic info about distance from town, public transport, availability of other transport; staff time devoted to building connection (e.g. volunteer co-ordinator at Taurus); frequency of members of wider community coming into the CVT community to teach a class or run a retail outlet; frequency of tenants 'going out' to mainstream activities in the wider community; what else is being done to build relationships with wider community and make for 'active and supportive' connections. This will lead to series of recommendations on a community by community basis; it might include new posts (volunteer organiser or community bridge builder). This could also address the issue of size and configuration of services (houses) if trustees wish – to do so would widen the scope.
- Use person-centred practices to enable people to explore their relationships, and community maps, and to think about plan in relation to individuals connection and contribution to communities

## Flexible integrated care and support: my support, my own way

- Enable people to choose who they live with and who supports them. This touches on a part of the basis of how the Camphill co-worker-led approach has evolved and how volunteer co-workers and new tenants 'arrive' in a service. We suggest this is best addressed as part of re-framing of this model (below) using some of the methods of Shared Lives schemes terms, where *matching* is a central part of the approach. Croft is using a tool known as 'Where do you want to live' to help people make informed choices about their home: this sort of approach could be used elsewhere. The person-centred

- thinking tool ‘matching’ is a way to do this, and building capacity with person-centred practices in CVT would enable this to be used
- Enable people who use CVT services (and their families) to be involved at all levels in the trust’s governance and operation and in the management of their own community. Critically this should include representation on Board of Trustees, Local Management Committees (where these still exist) and other local arrangements. A further more detailed piece of work in this area is needed to look at best practice from elsewhere, good practices already in place in parts of CVT and to propose a programme and timeframe to put such arrangements in place. It needs to be clear that this is about change in organisational culture but given the ability level and capability of some tenants it is readily achievable given the will.
- Enable people to choose what work they do. Addressing this would go a long way to counter much of the outside criticism of CVT services (there are comments from several commissioners that this remains a concern). To do this well would go to the heart of how some of the more traditional/rural communities conceive of themselves, with focus on the land and traditional crafts. The trust needs to be mindful of how difficult it will be in reality for many to move to outside paid work in the current economic climate, so there needs to be an element of realism. We suggest that at an agreed time CVT makes a public statement committing to paid work (‘Real Jobs’) and social enterprise and launching a programme to review all existing activities with this in mind. This could be done in a variety of ways: CVT could employ a consultant to help lead the review and re-design work/day activity; or could start by using, for example Community Catalysts’ Innovation and Enterprise programme<sup>2</sup>. This initiative would link with project with McIntyre which aims to use skills and interests among people already working in the organisation. This will require more consideration, but should start from the commitment that it needs to happen. Starting with people having one-page profiles, where they describe what is important to them, and the support they need, would be an important foundation to people choosing the work they do.
- Enable people in work roles to have the support they need. Related to the last point. Providing appropriate support would be part of the remit of an exercise to review and redesign work opportunities.

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<sup>2</sup> <http://www.communitycatalysts.co.uk/case-studies/unlocking-the-creative-potential-within-staff-teams/>

## **Workforce: my support staff**

- Investigate the key methods used in Shared Lives schemes, and person-centred practices and consider adapting or adopting these for co-worker led houses. Investigate a matching process for tenants and families/co-workers as part of this.
- Adopt a support planning process for all CVT tenants. Audit existing support plans in all communities and where plans are inadequate or insufficiently person-centred discuss what is needed to remedy this with local commissioners. Ensure in particular that all plans include a robust process whereby people can select their support staff.
- Where the above audit process reveals significant shortfalls in a community or group of communities around personal service design/staff selection, consider the steps needed to enable people to broker appropriate support. This may include a local CVT brokerage service.
- Review and revise HR policies and procedures involved in recruitment of staff in relation to best practice in recruiting staff around defined needs and expressed wishes of people using services. See for example, work by Helen Sanderson and Steve Scown on this<sup>3</sup>, and how they used person-centred practices to enable people to decide on how they want to spend their time and be supported and matching this to staff

## **Risk enablement: feeling in control and safe**

- The Board of Trustees should urgently request formal recommendations on improving safeguarding from the consultant working with the trust and incorporate urgent actions within the first stage of the proposed CVT development plan. Recommendations would be for the consultant to make but we suggest they should incorporate the following:
  - Adopt a statement that supports people taking sensible, agreed and managed risks in order to achieve their ambitions and goals.
  - Review 'community connectedness' in each of the nine communities (see above). Include a review of connections that enable people to take sensible and agreed risks, with safeguards in place. Highlight good practice where this has happened.
  - Adopt a support planning process for all CVT tenants (see above). Include a process for evaluating and signing off risks. This will need conversations with

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<sup>3</sup> Scown. S and Sanderson. H. *From Block Contracts Towards Individual Service Funds*, (2011), Dimensions and HSA Press.

commissioners/social workers from local councils. CVT is likely to need to sign up to council-led process for risk enablement, possibly a panel.

- Review progress and take necessary action on implementation of safeguarding procedures and processes and on training for staff and co-workers on raising alerts and managing risky situations.
- Review and then change co-worker accountability arrangements, duty of care and responsibilities.
- Explore a 'person-centred approach to risk'

## **Personal budgets and self-funding: my money**

- Explore the development of an Individual Service Fund approach (where there is block contract in place) where the aggregate budget is split between a sum for overheads and a larger sum dedicated to meeting each individual tenant's need as set out in their support plan; or the presumption of a personal budget (where the funding is spot-purchased.)
- Provide individual tenants with information about how much money is available in their personal budget to fund their support and having the means to make real choices in how this is spent.

# Appendix B

## The review process

The review took place in four phases as outlined in brief below.

### Phase one

Key members of the review team met with senior CVT representatives in April to gain a greater understanding of the context and requirements for the review and to agree the project plan and approach.

### Phase two

During this phase we undertook three service review framework events which involved a review of current operations and practice within CVT. The events brought together key stakeholders from each community and used a service review framework tool developed by Groundswell that consists of a number of “success statements” that describe the sorts of things that people using a fully personalised service would be saying if it were working particularly well. The model explores how ‘support’ would look different to ‘care’. It assumes that if a personalised service is working really well, then people should have choice and control over what they are supported with; who supports them; when they have support and how it is delivered. In addition, the framework includes the criteria that if support is working really well, people will be able to play an active role in determining how the service developed, through meaningful co-production.

The three engagement events were held as follows:

- St Albans and Delrow – 24 May 2012
- Grange, Oaklands, Taurus and Camphill Houses – 29 May 2012
- Croft, Larchfield and Botton – 27 June 2012

During these events we consulted with 78 individuals representing a good cross-section of stakeholders from the communities including managers, staff, co-workers, residents and family members.

The findings from these sessions were then used to ‘rate’ the overall service against each of the framework criteria to identify supporting evidence that can be supplied and to explore what is working well and what could be working better. Running these events early in the

review helped us to gain a rounded perspective on how the communities are working and identify key lines of enquiry for subsequent interviews and further investigation.

A detailed analysis of findings from each session has been provided separately to CVT's management group.

### **Phase three**

The three service review events informed visits to all nine of the communities in England. Each of these visits took place over the course of a long day but in many cases incorporated overnight stays to enhance the opportunity for review. These visits provided an opportunity for the team to experience and engage directly with the communities rather than just collect and use views and data from the review exercises. The visits were planned with identified hosts in each community and included time to speak to a variety of stakeholders and observe activities and support provision.

The community visits took place on the following dates:

- Oaklands – 12 June 2012
- Grange – 13 June 2012
- Taurus – 14 June 2012
- Camphill Houses – 18 June 2012
- Delrow – 19 June 2012
- St Albans – 20 June 2012
- Larchfield – 17 July
- Botton – 18 July 2012
- Croft – 19 July 2012

### **Phase four**

In order to further explore the findings from the initial engagement events and subsequent community visits we carried out a number of individual conversations and conference calls with people, which included trustees, general managers, social workers, safeguarding leads, commissioners and family members.

**Individual conversations included:**

- Commissioners from all the CVT community areas
- Richard Steele – Karl Koenig archivist based in Germany
- Karen Walker, sister of resident at Grange and chair of Camphill Families and Friends
- Mary Peedell, family member of Botton resident
- Duncan Cameron, family member of Botton resident
- Michael Luxford, co-worker
- Geoffrey Weir, Chair of the Association of Northern Ireland Camphill Communities
- Pétur Sveinbjanarson, CVT trustee

**Conference calls**

- Trustees – this conference call included: Di Parrish, Felicity Chadwick-Histed, Michael Green, Chris Cook, John Carlile.
- Social workers – this call included: Phil Gibson, Natalie Denison, Andy Paton, Steven Peacock. An additional phone conversation also took place with Frances Wright, CVT HR lead.
- CVT management – this call included Huw John and Mark Denny
- Safeguarding leads – this included: Jacquie Spencer and Deborah Kitson

In addition to these conversations, the team also reviewed a great deal of material submitted by CVT and others.

## Appendix C

*Submission to CVT Review by Camphill Families and Friends*

*6<sup>th</sup> September 2012*

*Camphill Families and Friends*

*We trustees of CFF thank you for letting us present our collective submission to the review. CFF members are mostly the families and friends of residents in Camphill communities in England, Wales and Scotland. While we represent the families of all Camphill communities, not just those in the CVT, many of our members and trustees have relatives in CVT communities.*

*CFF has held in the past two years a series of six very well-attended meetings examining how Camphill can cope with the challenges facing it. While CFF takes a neutral stance on any issues affecting individual communities, we have been able to develop, as a result of our meetings, a powerful message about how Camphill might move forward by adopting and adapting the ideas and experiences of those communities in which change is already successfully taking place. These good ideas are contained in our document Lessons learned, which was the culmination of the advice and recommendations of the speakers at our meetings and our own and our members' responses. All the points which we highlight in this submission can be exemplified and confirmed by the many good ideas contained in Lessons learned, most of which came from the managers of successful Camphill communities. (See link below)*

*CFF realises that the situation in the CVT and in other communities is changing all the time. While our main message is contained in Lessons learned, we would like to highlight for the review those matters which, we strongly feel, are of particular and great importance to families and to residents.*

### *1. Adapting to modern legislation and policy*

*We think that it is important to state at the outset that we welcome the various developments which bring Camphill more fully into the modern world, such as good governance and management, compliance with external regulatory demands and the implementation of government policies directed at developing the lives of residents, such as personalisation.*

*While we recognise that Camphill communities face – and are perceived to face – problems of adaptation to these changes, we are confident that, as our Lessons learned show, this adaptation can be achieved successfully. However we do acknowledge that this will be a difficult process.*

*We trustees and our members, mostly parents and siblings, have discussed these changes extensively and with feeling. We all have sons and daughters, brothers and sisters, relatives and friends living in Camphill communities, many within the CVT, and we are all supremely committed to the successful future of Camphill communities. We have found that they provide the lifestyle, experiences, achievements and relationships which residents want and need. We realise fully that such a way of life would not be the choice of all people with learning disabilities but we know from our own personal experience that it certainly suits those who do choose it.*

*One good modern development is the inclusion of the families of residents as partners and stakeholders in Camphill communities. We recommend that this be pursued more formally within the CVT. We also feel that CVT membership should be re-opened to families and others in due course.*

*We realise that there will be substantial changes within Camphill communities resulting from legislation and government policy but we strongly wish it to be known that we feel that some aspects of Camphill communities, while incorporating change, should retain as many of their essential features as is possible.*

*The particular aspects of Camphill with which we families wish to bring to your attention are the following. For personal and heartfelt statements about the validity of our support for these aspects of Camphill, please see the evidence at the end. **We would strongly urge the CVT trustees and management to persist in upholding these qualities within the context of modern legislation and policy, whatever difficulties might appear. We are behind them in such an enterprise.***

## *2. The intentional community*

*We are greatly heartened by the fact that intentional communities are recognised in government policy as a suitable form of housing, support and care for those who choose them. It is the intentional community which, we believe, most strongly*

*benefits our relatives and provides the social life, the daily interchange of ordinary experiences, the work, the relationships, the concept of community, the occasions of celebration and ceremony, as well as the sense of confidence, worth and achievement that are not always so easily found in other learning disabled settings. We all believe this. We fully support the emphasis on independence, the development of the individual personality, the lifestyle geared to individual choice, the involvement of the person in the management of the community and the whole range of activities being developed by the personalisation agenda and we believe that these qualities can be developed fully **within the setting of an intentional community**. We believe both that our relatives want, appreciate and need a community life as a matter of their own choice and also that the Steiner philosophy draws out the main elements of the individual personality. Community and individuality are definitely not mutually exclusive.*

*Professor Emerson's research, which gave rise to the government's recognition of intentional communities as a valid form of housing, noted the high levels of support for communities among families. This is no mean achievement and it confirms the immense faith that families have in Camphill. **The families of people with learning disabilities are notoriously difficult to please but we and our members are so proud and happy that our relatives are residents of Camphill intentional communities.***

### *3. The Camphill household model*

*We believe that, within the intentional community, the Camphill household model is one of the main reasons for the success of our relatives' lives. By this we mean a house in which traditionally several residents share their lives with one another and with a needs-based co-worker(s) who usually also lives in the house. Such an accommodation model is an effective form of supported living also bringing companionship, guidance, sharing in decision-making, common activities such as mealtimes, speech development, and consideration for others, greater empathy, a sense of security as well as the development of the individual's personality, confidence and self worth. We recognise that this traditional model is changing in some communities in that the co-worker might become employed or might even live elsewhere but we feel that the basic elements can be successfully maintained, as some of us know from direct personal experience.*

We also welcome the fact that that some residents and their families might prefer a more separate form of accommodation, such as an independent or shared flat, while still sharing in community life. Such provision has always been a desirable aspect of Camphill. **However we maintain that most residents and their families do prefer the household model and that it should be strongly nurtured as it changes and develops.**

#### 4. The role of co-workers

The CVT's very being is based upon the ideals of Rudolf Steiner regarding community and the recognition of the special qualities of the individual with learning disabilities. These are the ideals which families value so much as providing the basis of the community in which their relatives thrive. Without doubt the main repository of these ideals is the body of co-workers, as is recognised in the CVT's objectives.

While we recognise that, in the new dispensation, the role of the co-worker is changing, especially in that governance and management have a much greater role, we feel that the importance of co-workers in the lives of our relatives needs to be recognised and upheld as much as possible. While we support the tradition of needs-based co-workers we also feel that the Camphill impulse can be carried forward whether co-workers are needs-based or employed and whether they live inside or outside the community. We feel that a wider definition and concept of the co-worker is developing within Camphill and we trust that the CVT will encourage this development.

From the experience of our meetings and our correspondence we have no hesitation in asserting that the high regard for co-workers is universal among our members.

**While we realise that there will be problems of adaptation to new ways, the beliefs, attitudes and work of co-workers are central to the lives of our relatives and to the success of the CVT.**

#### 5. The CVT as a values-driven charity

Families all realise and welcome the fact that the CVT is driven by the principles of Rudolf Steiner and has a unique quality among the range of choices open to people with learning disabilities. It is crucial that the CVT retains this special quality by highlighting to the sector and to the outside world that it is a values-driven

organisation in all its activities. This is particularly important in the recruitment and training of all those who live and work in CVT communities. While maintaining an open policy in these spheres, the emphasis on values, briefly and simply defined, should be prominent in the requirements of all levels and jobs. These values cannot be insisted on but many applicants will be taken on who are already committed to them and who are attracted to the work of the CVT. Others should be sympathetic to the values and be prepared to receive training in them alongside their professional training. **We welcome the CVT's special quality as a provider of communities based on values and we trust that it will formalise these values in its policies and practices.**

### Evidence

We should like to present two examples of the value that families place upon the CVT communities in which their relatives live. These are personal pieces that two parents have written and they bear witness to the importance of the points which we raise in this submission. Although this evidence is qualitative and not quantitative, it is hugely representative of families' views and we can assure you that the many families we know would relate to and share the sentiments expressed in them.

1. "However, I think for us the main issue is the lack of co-workers in my daughter's community and the subsequent lack of all that they bring with them, the awareness of cycles and rhythms in people's lives and in the year, the perception of the development of the soul through the experiences of this life and how they can help that process, seeing the individual as a whole person with enormous value for their (the co-worker's) own daily experience and for other members of the community, the curative value of the art work, weaving, eurythmy, making music, cooking and eating together, the fact that on the whole they are a group of people trying to live out of high ideals at a time when many don't. Also, as you say, the sense of family and home that they replicate - and dare I say it - the love they bring.

I have the sense that they start with the individual and work outwards whereas society tends to try to force the individual to fit into its boxes first and look at the individual second. I think too that while my daughter's community now has some very good young care-workers who come in daily (there are no live in staff now except the young annual co-workers and there aren't as many of those as there used

to be) what they don't have is the impulse that the co-workers have of actively working to establish relationships and community between themselves. This is somehow very important. Whilst many of them care a lot about the residents they go home at the end of the day and, as they are on shifts, they often don't meet up with each other much anyway. There is not the sense of purposefully sharing life together but rather they work together. All this has a subtle but strong impact on the community.

One of the key points you made for me is the sense that community and shared living enhances confidence and independence rather than undermining it. It figures that the more valued, cared for and 'seen' we feel the more confident we become. The co-workers also provide a continuity in the development of the residents by their long-term presence.

Families too are (should be) part of the wider community and the lack of contact and communication is as we all agree not right and needs addressing.

I want us to speak out about the great importance of valuing the co-workers and everything they bring (well most of it). It seems that they are a dying breed at the moment and everything should be done to address this and to support a system that attracts new people who will take on the role and inevitably to some extent create a modern model of it. By this I mean that there are many altruistic young people out there who could be attracted to community life but who will be the 21st century-version co-worker working within, and supported by, a modern sympathetic and values-driven governance and management. Without this I fear that Camphill will become just another service provider. For us the co-workers are the absolute heart of the Camphill movement along with our relatives - the two go together. If their presence in the communities is allowed to die out or, even worse, be actively discouraged it will spell disaster for the Camphill that we all value so much.”

2. "At its best, the model where co-workers live alongside our relatives, sharing meals, festivals, the ups and downs of daily life, seems to offer them the best chance of developing to their fullest. Sometimes people need guidance from someone who knows them really well to see that a short-term choice might not be the best, or provide the most satisfaction for them, in the long run. A co-worker explained to me that learning disabled people need help to create a home; they want and need one,

*but can't always do it by themselves. The relationships that co-workers have with each other, and the children they often bring with them, also build a richer community from which our relatives benefit.*

*I think it may not matter so much whether staff are paid, or needs-based as they traditionally have been. What matters is the extent to which enough committed people are sharing life in the fullest sense with our relatives. If there are enough of them, then support workers coming in and out can only be good. They can be trained by experienced co-workers, and learn through association, about the things which make Camphill unique. Co-workers will also need to adapt to the changing times: personalisation, demands for transparency, more involved families. There are changes needed in communities - no question - but co-workers need to be valued, respected and their long experience drawn on, for Camphill to thrive (or even survive). Otherwise we shall be left with a run-of-the-mill care facility, which is not what we or our children chose."*

*We should also like to recommend our report, Lessons learned, which reached many conclusions great and small about how Camphill can carry its essential qualities into the future:*

*Link to Lessons learned.*

*<http://camphillfamiliesandfriends.com/wp-content/uploads/2012/07/Report-of-London-meeting-23rd-June-and-lessons-learned.pdf>*

*END*