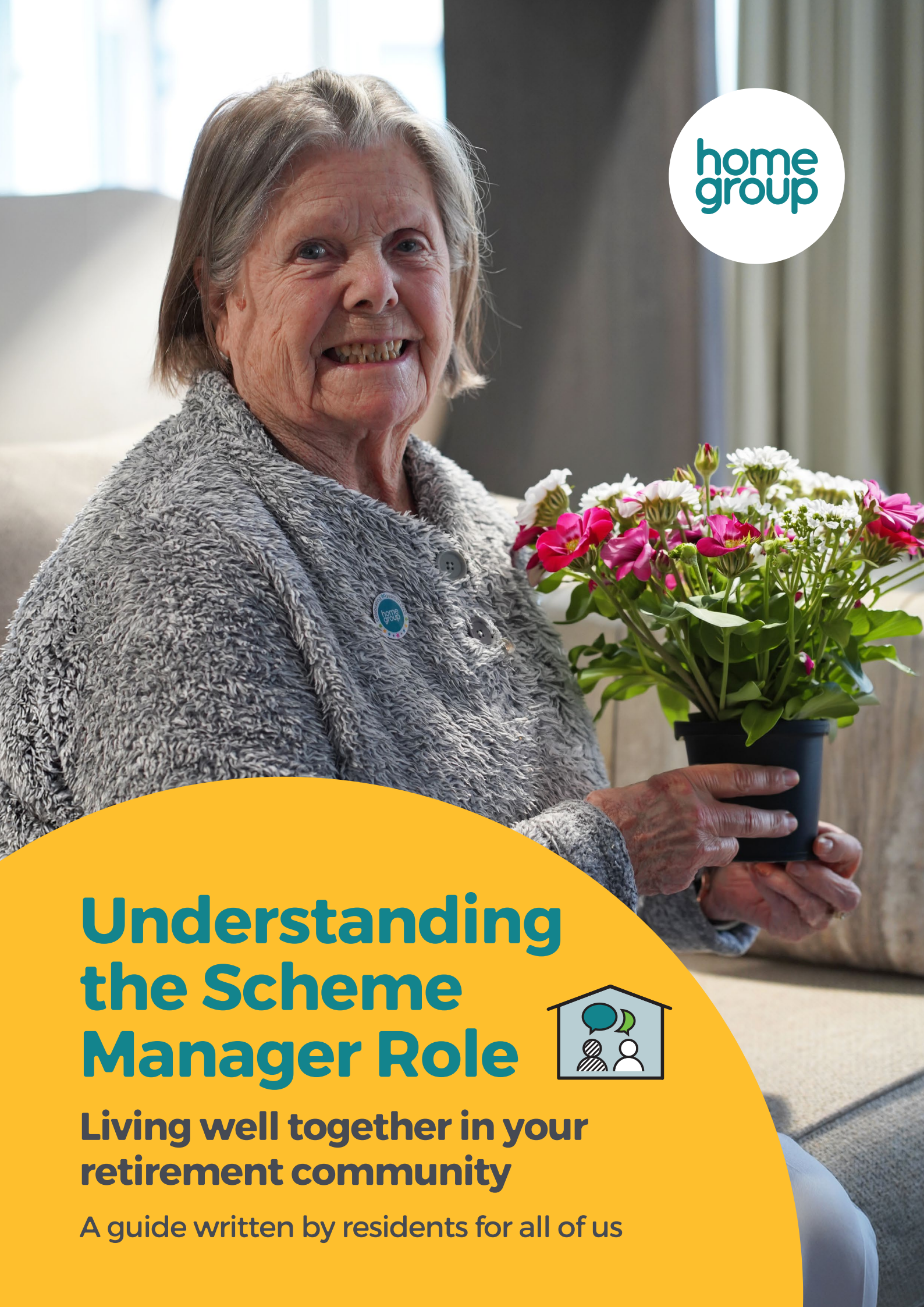




home
group

Understanding the Scheme Manager Role



**Living well together in your
retirement community**

A guide written by residents for all of us

Just like our retirement schemes, this guide has been shaped by the people who live in them.

We wrote it as residents, drawing on our lived experience, conversations with Scheme Managers and colleagues, and what matters most to us as residents. It's for anyone already living in a retirement community, and for anyone thinking about moving into one, as well as all Home Group colleagues and external organisations.

This guide explains why we reviewed the Scheme Manager role, what we learned along the way, and how a clearer role and professional boundaries help our communities to thrive.

Why we reviewed the Scheme Manager role

Many of us thought we understood the Scheme Manager role – until we took the time to look at it properly.

Some of us moved into our homes years ago when schemes were managed very differently. Over time, roles changed, but understanding didn't always keep up. Expectations varied from scheme to scheme. Some residents expected personal help, while others weren't sure what assistance is available in an independent living scheme or who to contact.

At the same time, Scheme Managers told us that their role had grown more complex, with many responsibilities happening behind the scenes and professional boundaries becoming blurred.

Our leases still refer to Wardens, and it's important to be clear that the role of Warden is now referred to as Scheme Manager.

We were clear from the start: this review wasn't about taking anything away. It was about clarity, fairness and consistency – so residents, families and colleagues all understand what to expect, wherever they live especially for those schemes where the Scheme Manager is residential



How we worked together

This was a shared journey, built with residents and colleagues.

Residents who are members of the South Retirement Leasehold Viewpoint worked alongside Scheme Managers and colleagues across Home Group for a full year. We didn't just comment on drafts – we worked through the same exercises, asked questions, challenged assumptions and learned from each other.

“Many residents told us they were surprised by the range of responsibilities Scheme Managers hold – and how much of their work isn't visible day to day.”

Together, we:

- ✓ Looked at why the review was needed and what success should look like
- ✓ Mapped out daily, weekly, monthly and annual Scheme Manager tasks
- ✓ Explored real life situations to understand professional boundaries
- ✓ Talked openly about independence, fairness and support, and what this means in independent living
- ✓ Used clear, accessible language to create shared guidance



Resident perspective

Margaret

Home Group retirement scheme resident

When I first moved into my scheme, I'll admit I thought the Scheme Manager was a bit like the old wardens we'd had years ago. I didn't really understand what was part of their role and what wasn't, and at times that led to frustration on both sides.

Being involved in this review changed that for me.

I had no idea how much work goes on that we never see – the safety checks, paperwork, meetings and problem solving that all happen quietly in the background.

What stood out most was learning about professional boundaries – not as rules, but as something that protects everyone. Knowing when and how assistance is available, and who to contact when extra help is needed, has given me much more confidence.

I feel reassured now. The Scheme Manager is there to assist our community, not replace our independence – and that feels like the right balance.

Since the review, conversations feel clearer and easier. Expectations are more realistic, and relationships feel more respectful. For me, that's what good community living is all about.

Colleague perspective

Tyson

Home Group scheme manager

From our side of the fence, being part of this review has been incredibly valuable.

Residents don't always see everything that goes into the Scheme Manager role. Some of our tasks happen quietly in the background, others are unplanned, and no two days are ever quite the same.

What stood out most for me was how open residents were to learning about the role – not to criticise, but to understand it better. They've championed it and want to help other residents understand it too.

Talking openly about professional boundaries was a turning point. For those of us who live and work in retirement schemes, it helped highlight why clear expectations and clear professional boundaries really matter. Residential scheme managers live and work in the same environment 24/7 – we're human and we need a work life balance.

This work didn't feel like blame or complaint. It felt collaborative and respectful. Seeing residents use their lived experience to shape the role positively has been something I'm genuinely proud to be part of.

The scheme manager is the lynchpin of each scheme – and this project helped make that visible.

For me, this review has led to clearer conversations, healthier professional boundaries and stronger relationships. That's what makes a scheme work well – for residents and colleagues alike.

What we found

As the review progressed, some clear themes kept coming up.

We agreed that:

- ✓ Clarity helps build trust
- ✓ Professional boundaries help everyone feel safe and respected
- ✓ Consistency leads to fairer experiences across schemes

Residents also told us what they most wanted to understand:

- ✓ What Scheme Managers do – and what they don't do
- ✓ Their working hours and out of hours arrangements
- ✓ How decisions that affect schemes are made
- ✓ How residents can be involved and have their say



These insights directly shaped the refreshed role and guidance.

The refreshed Scheme Manager role

What the Scheme Manager is here to do.

Every retirement community has a Scheme Manager who helps ensure the scheme is safe, well managed and welcoming.

Their role focuses on looking after the building and shared areas, facilitating good communication, and helping residents live independently with peace of mind.

Scheme Managers work with residents and their families, colleagues, contractors and external services to keep schemes running smoothly – always respecting independence, privacy and personal choice.



What Scheme Managers do

Keeping schemes safe and well managed

Scheme Managers:

- ✓ Carry out regular fire and health and safety checks in communal areas
- ✓ Raise and follow up repairs and maintenance to the building, shared areas and communal facilities
- ✓ Monitor contractors and standards of work
- ✓ Respond calmly and professionally to incidents and emergencies

Some of this work is visible, and some happens quietly behind the scenes – but all of it helps keep our homes safe and comfortable.

Independent living

Scheme Managers:

- ✓ Offer guidance, information and reassurance when needed
- ✓ Carry out agreed welfare checks
- ✓ Signpost residents and their families to external services and support
- ✓ Welcome new residents and help them settle into their community

Communication and community life

Scheme Managers:

- ✓ Share information through newsletters, noticeboards and meetings
- ✓ Listen to feedback and help resolve concerns
- ✓ Encourage involvement, while recognising that taking part is always a choice
- ✓ Help create respectful, inclusive communities

Safeguarding

Scheme Managers:

- ✓ Notice when someone may be struggling
- ✓ Raise safeguarding concerns appropriately
- ✓ Follow clear processes and seek guidance when situations are complex



“Everyone has the right to feel safe in their home.”

Clear professional boundaries

Clear boundaries help our communities work well for everyone

Scheme Managers do not

- ✗ Provide personal or medical care, or any financial management
- ✗ Help with medication, washing, dressing, shopping or meals
- ✗ Act as carers, cleaners or personal advocates
- ✗ Make personal decisions on behalf of residents
- ✗ Provide out of hours support

“When extra help is needed, Scheme Managers point people in the right direction, so support comes from the right professionals.”





Working hours and out of hours support

Scheme Managers have clear working hours, just like other professionals.

They will:

- ✓ Notify residents when they are available
- ✓ Let residents know how they work
- ✓ Sometimes be off site or working quietly behind the scenes

If you need help out of hours:

- ✓ Use your pull cord or pendant
- ✓ Contact Home Group's out of hours team on **0345 141 4663**
- ✓ Follow the guidance in your welcome pack

Living well together

Successful communities are built on kindness, respect and understanding.

We all have a role to play. We ask everyone to:

- ✓ Treat each other with patience and respect
- ✓ Listen to understand, even when views differ
- ✓ Stay calm and solution focused
- ✓ Respect privacy, independence and personal choice

“Clear roles and professional boundaries help relationships stay positive and supportive.”



How we will measure success

Residents helped define how we'll know this work has made a difference.

We will look at:

- ✓ Resident feedback and satisfaction
- ✓ Understanding of the Scheme Manager role and professional boundaries
- ✓ Complaints linked to unclear expectations
- ✓ Scheme Manager wellbeing, confidence and retention
- ✓ Consistency of experience across retirement schemes



For us, success means stronger relationships, clearer understanding and communities where people feel informed, respected and able to live independently.

A final word from viewpoint

We're proud of what we created together.

This guide is about understanding, not blame - and about working together so our retirement communities remain places where people can feel at home.

- ✓ Clear roles
- ✓ Clear professional boundaries
- ✓ Thriving communities



Our commitment to delivering for our customers and communities remains constant and we exist to deliver on our Customer Promise every day.

www.homegroup.org.uk

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