

Living Longer Living Better

March 2007

**REPORT OF AN ADVISORY GROUP ON THE
STRATEGY FOR OLDER PEOPLE IN WALES**

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Foreword

By John Griffiths AM, Deputy Minister for Health and Social Services, Welsh Assembly Government and Chair of the Task and Finish Group.

People in Wales are living longer and healthier lives. And we have a higher concentration of Older People than the rest of the UK. Over the next 20 years demographic changes will significantly alter the balance of the population. The Welsh Assembly Government launched the Strategy for Older People in Wales in 2003, demonstrating leadership across the UK and beyond in planning for an ageing population. It is widely recognised for its achievements and progress. The first phase of planned implementation is now coming to an end.

The Strategy is about full and active citizenship, a vision of later life that moves beyond the traditional concerns of social services, pensions and care homes. It is about shedding the stereotypes that surround older people - ensuring they live the lives they want and deserve. It aims to improve the lives of all older people and to bring about change that will ensure future generations respond positively to later life. At the heart of the Strategy is the expectation that older people be valued as equal citizens, able to fully participate in society. It is about supporting people to work longer if they want to; ensuring access to transport, education courses and leisure activities, promoting health, well-being, active ageing and independence. It is about having options to choose from.

Since its launch the Strategy has made considerable progress. It has delivered in line with the implementation programme and established firm foundations at both a national and local level. This report is a timely reflection on achievements to date, work remaining to be done and priorities for the future. It presents the observations and recommendations of a Task and Finish Group including Older People and Older Peoples organisations, which will in turn shape the next phase of the Strategy. As part of the deliberations, there have been extensive consultations and research to inform recommendations.

I am very pleased to report the findings of this wide ranging process. The Group has shown enthusiasm and dedication. Their observations and recommendations provide the latest thinking to build on the first phase of our strategy and take it forward to the next stage.

As the Minister with special responsibility for Older People in Wales it has been a great pleasure to work with Older People and their representative organisations on such a positive and well received agenda to improve quality of life for our Older People. We must ensure the firm foundations established are well used to make the next phase of the strategy even more productive.

A handwritten signature in black ink, appearing to read 'John Griffiths AM'. The signature is written in a cursive style with a large initial 'J' and 'G'.

John Griffiths AM

Summary

Populations around the world are ageing as a result of improvements in health services, education and economic development, increases in life expectancy and falls in fertility. Set against this background of population ageing, in 2003 the Welsh Assembly Government produced a Strategy for Older People in Wales.

It provides a structured basis for the Assembly, other public bodies and the independent sector in Wales to develop future policies and plans which better reflect the needs of older people, recognising the changing demography and social circumstances. Underpinning the Strategy are key values that reflect the United Nations principles for Older People (Independence, Participation, Care, Self-fulfilment and Dignity). The Strategy was based on extensive research evidence and comprehensive consultation, especially with older people and their representatives.

Set in a 10-year framework, the Strategy has an Action Plan with detailed objectives and programmes. £13m over a 5 year period to March 2008 has been committed to ensure effective implementation of the Strategy. This report, which looks at what the Strategy has achieved and what needs to be done in future years, is timely given that the Strategy has been in place for almost four years.

We recognise that the Strategy has a very challenging agenda given that it cuts across many issues affecting older people and this approach needs to continue in Phase 2. Similarly our approach to this report has mirrored this challenging agenda and we have considered the following issues:

Strategic Aim:	Relevant Topics:
Valuing Older People - Maintaining and Developing Engagement	<ul style="list-style-type: none">• Engagement and participation• Age discrimination• Accessibility and mobility• Planning and infrastructure• Poverty• Technology• Developing joined up services
Changing Society – The Economic	<ul style="list-style-type: none">• Economic inactivity at 50+

Contribution of Older People	<ul style="list-style-type: none"> • Extended working life • Life-long learning and skills development • Volunteering • Caring
Health, Well-Being and Independence	<ul style="list-style-type: none"> • Healthy ageing • Social services • Mental health • Housing • Raising standards in care homes and domiciliary care. • Paying for care
Making it happen - Structures and implementation mechanisms	<ul style="list-style-type: none"> • Government Structures and support bodies • Local authority structures • Research and policy development

Valuing Older People - Maintaining and Developing Engagement

Citizenship is at the heart of the Strategy and this Chapter introduces issues that facilitate citizenship and engagement such as age discrimination, transport and mobility planning and infrastructure, poverty, technology and the development of joined up services.

Some progress, especially to improve engagement of older people, has been made by the Welsh Assembly Government, local authorities and the voluntary sector, though there are still areas which need further attention. For example, reducing age discrimination should continue to be at the heart of the Strategy. The Commission for Equality and Human Rights and the Commissioner for Older People in Wales will provide the new framework for this. Accessible transport should be a priority; planners need to consider the usability and accessibility of buildings and services in the context of an ageing population; and the development of more integrated and joined up services for older people should continue in Wales. Furthermore there is much evidence to suggest that pensioner poverty is still a fundamental issue for many older people and the next phase of the Strategy should look to develop an integrated approach to tackling poverty amongst older people, maximising the impact of devolved policies. More also needs to be done to ensure older people fully take up benefit entitlements and have effective advice services.

Changing Society - The Economic Contribution of Older People

The Strategy for Older People recognises that the skills, knowledge and experience of older people are an asset to building the Welsh economy. This Chapter emphasises the economic contribution made by older people. This includes contributions beyond that achieved through engagement in the labour market, including caring and volunteering. It also highlights the importance of lifelong learning and skills development.

We recognise that this is an area that presents many challenges and recommend that it is high on the agenda for Phase 2 of the Strategy. In particular we believe that the Welsh Assembly Government should continue to work with the UK Government and Local Government in order to support the recruitment and retention of older people in employment. Also more needs to be done to ensure that life long learning is a reality for all and not solely linked to academic qualification or formal examination. Furthermore the Assembly should support a review of volunteering programmes involving older people as a basis for further development of the active contribution of older people in society.

Health, Well-Being and Independence

The Assembly Government recognises that new ways of delivering policies, programmes and public services are needed in order to make a real difference to the people of Wales. Reflecting this principle, this Chapter presents a new approach to the Strategy, merging the two sections '*Living Longer and Healthier Lives*' and '*Coping with Increasing Dependency*'. Implicit in this new approach is the role of social care. This change was felt to be necessary so as to broaden out the previous Strategic aims, and to avoid duplication with other recent initiatives.

There are many important issues that the Welsh Assembly Government will need to address during Phase 2 of the Strategy. For example the next phase of the Strategy should give more emphasis to tackling isolation and loneliness and the impacts of pensioner poverty on mental health; the recently launched Assembly Strategy, *Fulfilled Lives – Supportive Communities*, and the *National Service Framework for Older People* both need to be robustly implemented; the development of a new vision on future

housing options for older people is required; the continuing improvement of quality of service in care homes is a priority.

Structures and Delivery Mechanisms

In this Chapter we look at the role played by the Welsh Assembly, its support bodies, local authorities and research to support policy development. Good progress has been made by all concerned and this needs to continue and develop during Phase 2. Prior to Phase 2 we recommend that the Welsh Assembly Government review the role and objectives of its current National Support Partners.

In addition we support the continuing appointment of co-ordinators and older people's champions within local authorities although co-ordinators should retain a wide cross-cutting corporate remit and further guidance should be issued to champions outlining their role. Furthermore guidance should be issued to local government on the engagement and participation of older people through 50+ forums.

Chapter 1 - Introduction

Background

Globally, populations are ageing resulting from improvements in health services, education and economic development, increases in life expectancy and falls in fertility. By 2026, the proportion of people over 60 in Wales will increase to more than 29% of the population. The oldest old (80 and over) are the fastest growing segment in many nations. It is estimated that by 2021 this older age group will constitute almost 5% of the population in the UK and the numbers over 85 in Wales will increase by over a third.

Set against this background of population ageing, in 2003 the Welsh Assembly Government led the way and produced a Strategy for Older People. It provides a structured basis for the Assembly, other public bodies, and the independent sector in Wales to develop future policies and plans which better reflect the needs of older people, recognising the changing demography and social circumstances.

Underpinning the Strategy are key values that reflect the United Nations principles for Older People - Independence, Participation, Care, Self-fulfilment and Dignity. At the heart of the Strategy is its agenda for the full engagement, participation, citizenship and subsequent empowerment of older people.

Moving away from a perspective that views older age as a problem and a burden, it strongly challenges discrimination and negative stereotypes of ageing. It aims to celebrate longer life as both an achievement and an opportunity. It seeks to ensure equality and dignity and identifies how much of the unfairness experienced in later life can be addressed. It aims to promote active, healthy ageing and well-being and sees older people as economic contributors. It promotes a whole systems approach so that universal and specialised services are available for older people. It aims to see that a strategic approach to ageing is taken that includes effective joint working.

Local Government in Wales has been at the heart of the development of the Strategy. The Welsh Assembly Government has made it clear that local government will play the leading role in taking forward the Strategy, through Community Plans and Health

and Well-Being Strategies, and also with the firm involvement of the NHS, voluntary and independent sectors, and of course older people themselves. Eighty percent of the Strategy funding has been made available to Local Authorities to give leadership to local change. Funding has also been provided to the Voluntary Sector.

Set in a 10-year framework, the Strategy has an Action Plan with detailed objectives and programmes. £13m over a 5 year period to March 2008 has been committed to ensure effective implementation of the Strategy. Now that the Strategy has been in place for almost four years, it is time to review achievements and suggest priorities for the future. This recognises the Strategy and its Action Plan are only a starting point in addressing the implications for Wales of an ageing society.

Context of the Report

This report will provide the basis of planning for Phase 2 of the Strategy. It is the product of a Task and Finish Group that involved a wide range of expertise and representation from many organisations and service users. This group met 6 times over a period of 6 months and was chaired by the Deputy Minister for Health and Social Services (details of membership in Appendix 1). The terms of reference for the Task and Finish Group were to:

- i. Consider the evaluation report on the implementation of Strategy for Older People in Wales and other relevant evidence.
- ii. Provide advice to inform the continued implementation of the Strategy from April 2008 in respect of:
 - aims and objectives
 - supporting structures at national and local level
 - priorities for the next stage to 2013
 - other influencing issues

In our discussions we considered a wide range of information which included:

- Results of a consultation exercise on priorities for the next five years of the Strategy which resulted in almost 50 observations/comments from a wide range of partner organisations;

- Material from focus groups conducted across Wales through Age Concern Cymru's "EngAGE" initiative and Help the Aged. These involved over 150 older people including specific minority groups such as older lesbian, gay, bi-sexual, transgender group and the minority Ethnic elders group;
- Policy papers provided by the Welsh Assembly Government;
- Background research papers;
- An independent overview of the strategy and its implementation, undertaken by AWARD.

In light of the evidence presented to us, the nature of this review required us to focus on the contents and topic in the Strategy as published in 2003. Consequently our discussions and recommendations form the basis of the following Chapters. The Group sought to identify the main priorities between the many potential themes and issues for the next stage of the Strategy. Time limits on the work of the Task and Finish Group meant that the focus of our work was at the strategic level and key issues for the future.

Within our society a number of age specific criteria have been adopted to denote when older age might begin. Based on earlier deliberations on this topic, the Strategy adopted a definition of older age as those who are fifty and over. This reflected the research evidence that chronological age is not a good measure of need and that policies need to reflect the differing ways in which ageing is experienced. Our consultation and discussions show that under this definition, many people did not consider themselves as an 'older person' and were resistant to being labelled as such. We accept that there are problems around definition, but that currently there are no easy solutions. There are some influences in later life that have a relatively strong relationship with chronological age in terms of their onset and duration. These include biological maturation, and age related socialisation such as the family life cycle, education and occupation. Yet there are other influences which do not occur at a specific time in the life cycle, but currently can lead to considerable disadvantage for many people in later life if appropriate policies and services are not available. These include factors such as unemployment, rurality, illness, divorce, bereavement, institutionalisation or relocation.

We recommend the Strategy should retain the current age range of fifty and over so as to provide the opportunity for a

fulfilling ageing experience, and at the same time to ensure that disadvantages experienced in older age are minimised.

The Task and Finish Group accept that the current strategic aims are relevant to Phase 2 but in light of changing circumstances recommend a number of changes to the strategic objectives. These are presented at the end of each chapter. We also recommend that in light of the progress of the Strategy, the Welsh Assembly Government reduce the number of strategic aims from 5 to four, with ‘Living Longer and Healthier Lives’ and ‘Coping with Increasing Dependency’ merged under a new heading of ‘Health, Well Being and Independence. We suggest the following:

Strategic Aim:	Relevant Topics:
Valuing Older People - Maintaining and Developing Engagement	<ul style="list-style-type: none"> • Engagement and participation • Age discrimination • Transport and mobility • Planning and infrastructure • Poverty • Technology • Developing joined up services
Changing Society – The Economic Contribution of Older People	<ul style="list-style-type: none"> • Economic inactivity at 50+ • Extended working life • Life-long learning and skills development • Volunteering • Caring
Health, Well-Being and Independence	<ul style="list-style-type: none"> • Healthy ageing • Social services • Mental health • Housing • Raising standards in care homes and domiciliary care. • Paying for care
Making it happen - Structures and implementation mechanisms	<ul style="list-style-type: none"> • Government Structures and support bodies • Local authority structures • Research and policy development

Each of these is now addressed in detail, setting out the background rationale, recommendations and revised aims and objectives.

Chapter 2

Valuing Older People - Maintaining and Developing Engagement

Citizenship is at the heart of the Strategy. Reflecting the UN Principles for older people it provides the basis for a vision of achieving full, real and meaningful participation for all older people. This Chapter introduces issues that facilitate citizenship and engagement, presenting evidence from the consultation exercise, interim review and the research literature.

Background and Policy Context

The Strategy for Older People set out a programme of citizenship as a key factor in achieving the strategic aim of 'valuing older people'. It defines a number of strategic objectives to enable people over 50 to have confidence in their sense of social and cultural self-identity, to enjoy freedom to pursue their interests and goals, to enjoy dignity and respect, to have full and equal legal rights, to be free from harm and poverty, and to be treated fairly.

Some progress has been made in achieving those under the aim of *Valuing Older People*. A National Partnership Forum for Older People in Wales has been established to provide a focus for debate about ageing and a source of expert advice to the Assembly. Local authorities are making good progress in engaging more effectively with older people, in many cases through the development of 50+ forums and the appointment of Older Peoples Champions from within their local Cabinet. The Voluntary Sector has also played a valuable role in improving engagement and in supporting forums. These issues are discussed in Chapter 5. An increasing variety of project work with older people is underway. However the evidence suggests that whilst progress has been made, there are still areas that need more attention.

During the course of our deliberations we discussed a wide range of issues relating to the theme of valuing older people. We have

captured these under the broad headings of:

- Engagement and Participation
- Age Discrimination
- Accessibility and Mobility
- Planning and Infrastructure
- Poverty
- Technology
- Developing Joined Up Services

Engagement and Participation

Context

The full engagement and participation of older people in society is an important part of citizenship. Local and national bodies need to fully consult with, and consider the views of, the public if they are to reflect this central theme of citizenship. A key aspect of the development of the Strategy was that it used research evidence on the lives of older people. Equally important, it considered the views of older people in order to actively engage them in the Strategy and to ensure full and meaningful participation. Reflecting this approach, the Task and Finish Group has considered the opinions of a diverse range of older people on the way forward for Phase 2.

Evidence from the Consultation Exercise, Interim Review and Research

The Consultation clearly shows that the Assembly, Local Authorities and other statutory bodies should consider alternative ways of consulting and engaging with older people along with alternative venues. There is a need to ensure 50+ forums are utilised to their full potential, and not just drawn upon to consult on specific topics. They need to be able to develop their own agendas, and know that consultation is a two way process. In line with this, older people's groups require feedback and confirmation that they are being heard and their views appropriately acted upon.

There are also some training issues. For many people who have not previously had dealings with the public sector, attending council meetings may appear intimidating. In line with that older

people may need to develop skills to assist in their participation in service planning and delivery.

Our View

We fully endorse these comments but recognise there is no “one size fits all” approach to be found and that no one body or group has all the answers. There are a range of agencies and operations that have been developed and are ongoing throughout the Strategy though we believe that the typically hard to reach groups (e.g. ethnic minority, LGBT, 50-70 age group, housebound) should be a priority for the next phase. Although we list some areas which require attention this is not exhaustive, all older people may in varying respects and at different points in their lives be hard to reach for a multiplicity of reasons.

The need for training for older people to be able to effectively engage with service planners is important and pre-retirement planning could go some way to encompass this aspect. Though this is a two way process and professionals will also need to develop their skills in this area.

We also recognise that the Strategy needs to define the term citizenship, and propose the following definition:

Rights - to receive support to prevent problems and obtain support from the state and its agencies

Responsibility - as an individual to develop and maintain a capacity to contribute to society

Obligations - to actually contribute to the betterment of the communities in which we live.

We suggest the following recommendations for Phase 2.

Recommendation 1	Work is needed to secure greater clarity about who is meaningfully involved in the process of engagement and decision making, on what basis they are involved and to identify any gaps in the framework of representation. This scoping work could be undertaken at 3 levels:
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	<ul style="list-style-type: none"> • Older people as individuals • Older people as representatives of groups led by older people • Organisations representing older people and those who are working as co-ordinators of older people's groups.
Recommendation 2	Sharing of effective practice for existing and developing Older People's Forums and other mechanisms of engagement should be further promoted.
Recommendation 3	A structured programme for Older People's Champions should be developed utilising a Champion's Toolkit.
Recommendation 4	<p>Further development of policy and practice in the involvement of Older People should consider:</p> <ul style="list-style-type: none"> • Tackling barriers to effective involvement • Widening involvement and increasing engagement • Approaches to engage groups that services find hard to reach • Capacity building for those who work with older people • Capacity building for older people • Facilitating a review of the training needs of older people to ensure fuller engagement and participation • Use of media and images of older people
Recommendation 5	Work needs to continue to develop approaches in Wales that will promote the positive image of older people and to ensure greater understanding and respect between generations.
Recommendation 6	Further development of activity to promote social inclusion of older people should be taken forward through Communities First and other programmes. There should be better linkages between the Older Peoples Strategy co-ordinators and Communities First co-ordinators and their respective Partnership Groups.
Recommendation 7	To further strengthen Local Policy Forums through establishing a link with the National Partnership Forum for Older People to give continuing contact and knowledge from each locality in Wales.

Age Discrimination

Context

Tackling discrimination against older people is central in the strategic aim of *Valuing Older People*. The Welsh Assembly Government's approach to equality is mainstreaming. Mainstreaming age equality requires the commitment of all policy makers at every level of government to recognise and promote age equality in all policy areas. This represents the most comprehensive approach to date capable of challenging ageism and the age discrimination experienced by those aged 50+ in Wales.

The evidence gathered indicates that the Strategy shows a significant conceptual shift in terms of older people's policy making in Wales, one that is consistent with the key principles of mainstreaming. Also, it exemplifies an approach to older people's policy that draws from the social model of ageing which is consistent with mainstreaming equality.

The Commission for Equality and Human Rights, established by the Equality Act, is a new body with powers to tackle discrimination and prejudice. Individuals suffering discrimination will have easier access to support and employers to improved advice and information in the one-stop shop offered by the single UK Commission for Equality and Human Rights (CEHR).

Age Discrimination and Human Rights for older people are also reflected in the role and responsibilities of the Commissioner for Older People in Wales, as set out in the 2006 Act. The Commissioner has a duty to develop protocol and implement policy around equality.

Recently introduced legislation makes it illegal for employers to discriminate against employees, trainees or job seekers because of their age and ensure that all workers, regardless of age, have the same rights in terms of training and promotion.

Elder abuse occurs when an older man or woman is harmed, mistreated or neglected by somebody in a position of trust. There are five main types of abuse - physical, psychological, financial, sexual and neglect that can occur anywhere, at home, in a care home, day centre, hospital or in the wider community and what is

most disturbing is that estimates suggest that most of the abused are related to those who carry out the abuse. Elder abuse is a manifestation of the most extreme form of ageism, where attitudes permit individuals to be treated with less than dignity and respect creating the potential for the desensitisation of degrading and abusive behaviour. Abuse of older people in many cases constitutes an abuse of their human rights, against which they should be protected.

Evidence from the Consultation Exercise, Interim Review and Research

The Assembly's recent Consultation suggested that Age Discrimination should be a central theme within the Strategy. Although it may now be tackled in the workplace (due to new legislation) older people expect age discrimination by employers which may explain why more people over the age of 50 are not actively seeking work. (We explore this in more depth in the following chapter).

We also heard that discrimination prevails across many other areas of life. For example there is wide discrimination against older drivers and many voluntary organisations have upper age limits for volunteers. In order to counter ageism the stereotypical images of ageing (e.g. infirmity) should be challenged. Images should be created that reinforce the notion of diversity within the older population.

Our View

We fully accept that the Strategy gives a very clear commitment to promoting an enhanced image of ageing for older people generally, and particularly those with disabilities, in the work of government at all levels.

We strongly feel that reducing Age Discrimination should continue to be at the heart of the Strategy as older people suffer more discrimination than any other group. Age discrimination is currently a cultural norm in our society with age being used as a proxy for lack of competence and decline and dependence.

We accept that the Government of Wales Act 2006, Commissioner for Older People and CEHR will bring opportunities to tackle

aspects of age discrimination and subsequently give it a higher priority in the equalities agenda and the relevance of human rights as matter of respect and dignity. We especially welcome that CEHR will weld together six different strands of anti-discrimination. Many cases of discrimination impacting upon older people cannot be sorted neatly into separate boxes labelled race, gender or disability etc. We welcome the fact that CEHR has to provide a working definition of equality and build around it a broader consensus of support. We also note that the UK Government is reviewing the law on discrimination on the grounds of age in provision of goods and services. Furthermore, changing the attitudes of younger people will help tackle age discrimination through national curriculum and inter-generational work.

Tackling age discrimination, in all its forms, should remain a priority for Phase 2 and it should be viewed in the context of equality. The Strategy is the key driver for challenging age discrimination and promoting the inclusion of older people in Wales.

We suggest the following recommendations for Phase 2.

Recommendation 8	Age Discrimination and Human Rights for Older People should be a central theme for the next phase of the Strategy for Older People, particularly in respect of the impact of the Commissioner for Older People and CEHR.
Recommendation 9	A policy of mainstreaming of age equality should be implemented effectively across all public bodies and publicly funded services in Wales.
Recommendation 10	Raising the awareness and understanding of direct and indirect age discrimination and its impact on older people should be a priority.
Recommendation 11	The Welsh Assembly Government should commission research to identify the causes of abuse, the extent of the problem, the most effective mechanisms for preventing and tackling it and how best to support those affected.

Accessibility and Mobility

Context

In December 2004 the Welsh Assembly Government unveiled an £8 billion 15-year transport programme to increase the Assembly's speed of delivery on transport, support development of the economy and the spread of prosperity to all parts of Wales.

Transport is a key area that cuts right across the Strategy and underpins the ability to participate. The free bus travel has been extended to include men aged 60-64. A 40% increase in free bus passes and a 60% increase in trips has resulted, and it has turned around a long-term decline in bus passenger journeys. A Community Transport Plan – particularly relevant to rural areas of Wales is being implemented, and the Assembly is providing core funding to the Community Transport Association. Additionally £3m is being provided for three years from 2005-06 to support 15 demonstration projects, testing ways to improve accessibility for those with severe disabilities who use community transport.

Evidence from the Consultation Exercise, Interim Review and Research

We agree that problems with health and mobility can be exacerbated by the accessibility and availability of public and private transport, resulting in mobility deprivation - older people are the largest group to suffer from mobility deprivation. In the Consultation, many respondents stated that transport should be a priority area.

In rural areas the need for private transport, particularly private cars, is acknowledged as the norm and a necessity. Half of all households without a car consist of individuals aged 60+. Therefore the needs of older people should be considered when planning the provision of transport. The Consultation suggests that rural transport is problematic and needs some direction from the Assembly. Although there is a positive response to the free bus pass, there is concern that it is not useful for those who live in rural areas and do not have a regular service.

Community transport is a viable alternative. However despite the potential of community transport, service provision is patchy.

Our View

Accessible transport should be a priority for Phase 2. We believe that generally people are often not aware of existing transport links and the Assembly should consider ways of ensuring that more and better information services are in place. Travel plans are essential and their use should be promoted.

There is also a need for better connection and joint working between all policy leads such as planners of highways, infrastructure, services, health and social to ensure that the mobility needs of older people are taken into account. In addition planners of retirement communities need to consider transport needs.

It is also our view that the availability and quality of public transport to meet older people's needs must be improved. In rural areas with poor services community transport is often also limited to those most in need, i.e. those who have disabilities.

The Assembly Government now funds the rail franchise operated by Arriva Train Wales, providing socially necessary services, especially in rural areas. It has the powers to introduce revenue initiatives such as discounted or even free travel for journeys within Wales. Should any such initiative be introduced, it will have to be mindful of such issues as affordability, capacity availability and current inter-availability of tickets between other franchise operators in Wales.

Current public transport user groups such as Passenger Focus and the Bus Users UK should be encouraged to engage positively with Older People and ensure their concerns are adequately addressed.

Transport and access to it plays a vital role in maintaining the independence of older people, particularly those who have a disability. Local Authorities should ensure that they review the transport needs of older people in their local communities to achieve better, more integrated and accessible transport including community transport.

All transport planners and providers should actively promote their services both nationally and locally.

Engaging with older people is vital and the Assembly should consider looking at the Powys Community Transport Forum to demonstrate to Local Authorities how community transport can be effective. There is a need to link with the local disability access group – there will be some common ground in terms of issues.

Finally we suggest that more attention needs to be given to related issues such as pavements, access via ramps, sighting of crossing, etc.

We suggest the following recommendations for Phase 2.

Recommendation 12	It should be an obligation for those providing and funding community transport, local health board patient transport and social services transport to engage in Service Level Agreements thereby providing an integrated local transport network.
Recommendation 13	Community Councils and Town Councils in Wales should be empowered to establish and operate local community transport services
Recommendation 14	It should be obligatory for all authorities to plan individual and corporate travel needs (Travel Plans) especially when the individual concerned is being assessed for their future housing and care needs, identifying access to and availability of public transport suitable to those needs.
Recommendation 15	The Welsh Assembly Government should assess and introduce a concessionary rail travel scheme for Older People.

Planning and Infrastructure

Context

There have been many recent advances in approaches to improving the independence and quality of life for older people and those with a disability. Examples include disability access, low-floor buses, lifetime homes, lighting and signage, remote technology, security systems etc. Where science and innovative technology has been used effectively it can create more comfortable and effective living environments for older people and improve quality of life. As 60% of those with a disability are also older people, addressing environmental barriers to access and generating a more integrated approach on many of those issues is of vital concern to older people.

Whilst there has been some attention on the built environment as part of the Strategy for Older People, there has not been a substantive focus. In particular the role of community planning has not yet fully addressed the needs of older people and those with a disability.

Evidence from the Consultation Exercise, Interim Review and Research

We agree with the evidence that the community has a profound impact on a person's attachment to place and sense of belonging, and with increasing age people's lives become more affected by their immediate physical and social environments.

Access to services can be affected by location of residence. Aspects of village life, such as local shops, post offices and doctors have often either closed or moved into larger towns. The issue of the closure of post offices featured for some of the respondents to the consultation.

We also agreed that the availability of specially designed housing in some rural Welsh communities can also be a barrier to those wishing to move, as they are often located several miles away from their social network. Also the fear of crime and a sense of safety are crucial.

Our View

We believe that moves into sheltered housing can occur because people no longer feel safe in their own homes. Community safety and perceptions of crime are key issues for many older people and should feature strongly in Phase 2 of the Strategy.

Planners also need to consider the usability and accessibility of buildings and services in the context of an ageing population.

The closure of local services, particularly post offices is a key issue for many older people. There is currently a debate with the UK Government about the future of post offices. We have spent some time discussing how local post offices play an important part in the lives of many older people. In relation to Wales more discussion should take place to look at ways of post offices evolving and delivering more services, perhaps along the lines of the one-stop-shops.

We suggest the following recommendations for Phase 2.

Recommendation 16	The needs of older people, in accordance with universal design principles, should be taken into account in the further development of the formal planning system in Wales, guiding land use and development of the built environment.
Recommendation 17	The importance of access to and availability of facilities and services to community life for older people needs action, including the recognition of the relationship between housing, transport and food access.

Poverty

Context

The Strategy for Older People in Wales recognises that many older people in Wales live in difficult economic circumstances. There are a number of policies, initiatives and schemes at UK, Wales and local level that address poverty amongst older people and maximise their income and support. The UK Government's *Sure Start for Later Life* sets out a programme of action to address poverty amongst older people in the UK. One way within this programme is to improve access to, and information on, services for older people through the development of integrated, one-stop service centres that also help maximise incomes and pensions and increase benefit take-up. The pilot programme 'Link-Age' has tested out this approach in Wales, focusing on pensions and benefits.

In addition the Strategy also recognises the important economic contribution made by older people and, for example, has provided support to enable people 50+ to start their own business.

Tackling poverty is of course also substantially dependant on non-devolved policy matters such as income, tax, pensions and benefits. Whilst pensioners incomes have increased there is still more work to be done in this important area.

Evidence from the Consultation Exercise, Interim Review and Research

Positive initiatives in the shape of free swimming and free bus travel are welcomed but concessions are a poor substitute for what people really want – i.e. sufficient income and choice of how to spend it.

From looking at the evidence we acknowledge that changes and losses experienced in areas such as health, income, housing, relationships with family and friends, having a role and feeling useful can result in inequalities and subsequent social exclusion in older age. Low levels of material resources are a key contributor to poverty and exclusion. The availability of financial resources further impacts on housing options and the ability to pay for food, medication and household bills.

We also recognise that statistics show that older people on state pensions spend about half as much on food as those with private incomes and single older people disproportionately occupy poor quality housing in the UK. In rural areas the experience of disadvantage is often hidden by being dispersed throughout a wide area, as opposed to clusters of deprivation that are often identified in urban areas.

The introduction of pension credit has helped reduce the level of poverty in older age, but a large number of older people are still not receiving their entitlement. We expect the LinkAge in Wales initiative to continue to address this problem.

The Assembly's Consultation highlighted that Government should continue to ensure that older people claim all benefit entitlements, and that the Link-AGE programme has been crucial. However means testing was felt to be detrimental. Older people with a small private pension are often just above the level to receive some benefits, yet could still be in difficulty. Means testing also affects learning, as being in receipt of a modest occupational pension and having some savings can place a person above the threshold for reduced fees.

Our View

During our deliberations we agreed that there is much evidence to suggest that pensioner poverty is still a fundamental issue for many older people. Unlike the rest of the population it is very difficult for individuals to change their financial situation once they pass state retirement age. Income levels of Pensioners in many other European countries are far higher than the UK, and the UK should fall in line with Europe. A forthcoming report from the National Partnership Forum for Older People will further inform policy development.

Link Age has led the way to improve benefit uptake, but more needs to be done to ensure that it reaches everyone. There are a number of barriers and perceptions as to why older people do not take up their full benefits and DWP in partnership with the Assembly should look at ways of improving this.

Furthermore housing conditions also contribute to poor health and are often intertwined with poverty. Further improvements in housing standards and quality are needed. We believe that energy efficiency schemes such as 'Warm Zone' can be a way of reducing pensioner poverty by reducing expenditure on fuel bills.

We suggest the following recommendations for Phase 2.

Recommendation 18	Whilst recognising the vital importance of action on non devolved matters, the next phase of the Strategy should look to develop an integrated approach to tackling poverty amongst older people, maximising the impact of devolved policies.
Recommendation 19	More needs to be done to ensure older people fully take up benefit entitlements and have effective advice services. Further work needs to be done on the barriers and inhibitors to benefit take-up.
Recommendation 20	The Welsh Assembly Government should make representations to the UK Government to press for pension reforms.

Technology

Context

Implicit within citizenship is engagement with civil and political matters, in which technology plays a key role. One of the Strategy objectives is to promote the benefits of learning and to provide

readily accessible information and advice to potential learners of all ages on learning opportunities available. Encouraging people over 50 back into learning will offer ways for them to gain new confidence and skills, to become economically active or to become involved in community activity and improvement.

Within Wales, Cymru Ar Lein has been managing the free basic ICT training programme 'Meet the Mouse', which to date has been well received. In addition the Broadband Unit of the Welsh Assembly raised the profile and benefits of ICT use amongst older people. This was further supported by the Silver Surfer week during May 2006.

Evidence from the Consultation Exercise, Interim Review and Research

The internet will become increasingly important for the delivery of information and services in the coming years. Although IT use has increased, older people are still not fully engaging with technology. 28% of people over the age of 65 have home internet access, compared to a UK average of 57% of households.

Although the majority of households have a TV, ownership of digital TV for people aged 65 and over is 20% below the UK average. A key issue then for many older people is the digital switchover. Although many people are aware of it, the timing and implications are not always clear. Initiatives such as Digital UK, who are leading the process of digital TV switchover in the UK are a useful resource and should be fully utilised.

One of the suggestions from the consultation is that the Assembly should continue to fund the delivery of IT to those 50+, as IT skills open up the world of communication. Others suggested that a novel approach to teaching IT skills would be to develop older people as tutors/mentors. There is also a need to consider ways to deliver IT to people who are housebound or frail. We would endorse these findings.

Our View

The increased use of IT and the development of the digital era can offer lots of benefits, but it can also be a real barrier to people with sensory difficulties, cognitive decline and dementia. Older people are not technology adverse, but there are areas in Wales which

are still not receiving broadband. Whilst we accept that it can be difficult to plan technology for the future as it is evolving so fast we believe that the Strategy needs to take a long term view on this.

We also want to highlight that excessive use of IT can be very isolating – there needs to be a balance between this aspect and the need for interaction. However, appropriately used, different types of technologies can support independence and improve quality of life.

We suggest the following recommendations for Phase 2.

Recommendation 21	The Welsh Assembly Government and Local Authorities should continue to promote the availability of IT and related skills training for older people so that the level of regular use is increased significantly above the current 28% for over 65s.
Recommendation 22	Encourage innovative practice to enable older people to become more skilled with new technology.
Recommendation 23	Give a priority to the implementation of digital switchover and its impact (financial and otherwise) on older people.

Developing Joined Up-Services

Context

There's no question that we face a set of challenges and opportunities for the public service which are perhaps greater than for many years. The proposition made in *Making the Connections* was that we could make effective collaboration a successful alternative to both structural re-organisation and competitive markets. This is further strengthened by the Assembly's response to the Beecham Report *Delivering Beyond Boundaries*. This report is clear that public service organisations must be more ambitious about involving citizens and engaging them in the design, delivery and improvement of public services. Services must be designed to meet the needs of all citizens and there must be core principles for customer service which are clear and transparent.

The local development of services for older people is crucial to ensure that the service is tailored to customer need. Services should be accessible to all parts of the community with the minimum inconvenience and disruption. Duplication and bureaucracy should be kept to an absolute minimum.

Link-Age in Wales (an initiative led by the Department for Work and Pensions in collaboration with the Welsh Assembly Government) is an example of this approach. It aims to build more effective strategic and operational partnerships between existing organisations in order to secure a “one-stop” approach to the way older people will access public services – a better joined up service for older people in Wales.

In its initial phase Link-Age in Wales has concentrated on maximising income and take-up of benefits by older people – addressing the problems of low income and poverty that affect some people in Wales. The initiative also feeds into ‘Making the Connections’ and in respect of older people, contributes to the drive towards a citizen-centred approach to planning and provision of public services in Wales.

Evidence from the Consultation Exercise, Interim Review and Research

A key theme running through the consultation was that the partnerships between housing, health and social care need to be a priority in the future direction of the Strategy.

The Consultation also suggests that for the next phase, partnerships need to ensure that key decision makers in other policy areas and departments, both national and local, take ownership of the Strategy, enabling it to be mainstreamed.

We fully endorse both points.

Our View

We accept that the Strategy has been successful in many ways in bringing partners together. Although there are models of partnerships in place that appear to be working (e.g. Link AGE, one-stop shops), there are still perceptions that effective partnership and joint working is difficult. There is certainly a need to use the citizen centred approach outlined in *Making the Connections* and the Beecham Report to empower older people to challenge the public sector and lead to greater transparency. Scrutiny also has an important role to play.

We also believe there is a need to learn more about how successful partnerships can be achieved and how streamlined decision taking can operate. We suggest that the evaluation of current partnership initiatives and sharing of effective practice could be informative.

For the next phase of the Strategy partnerships should be focussing more on achievable outcomes to instigate change.

There is a need for a stronger evidence base regarding how effective change through partnership is achieved. It should not be based on individual perceptions or personal preferences.

We suggest the following recommendations for Phase 2.

Recommendation 24	The development of more integrated and joined up services for older people, including the public private and voluntary sectors, should continue in Wales.
Recommendation 25	Further support and sharing of effective practice should be made available to tackle the barriers to effective partnership between the public, private and voluntary sectors.
Recommendation 26	The development of age-proofing and policy impact assessment tools should be a priority for the next stage of Strategy implementation.

Strategy's Aims and Objectives

We have discussed in detail the strategic aims and objectives and how they relate to Citizenship and Engagement. Following our deliberations we recommend the following

Strategic Aim

Reflecting the United Nations Principles for Older People, to tackle discrimination wherever it occurs, ensure that the human rights of older people are recognised, promote positive images of ageing and give older people a stronger voice in society.

Strategic Objectives

- To enhance the engagement with and participation of older people in society and at all levels of government, particularly

in the planning and development of local services and infrastructure

- To develop joined up services that are tailored and integrated to meet the needs of older people, taking language needs into account through arrangements that promote public protection, strong partnership and network arrangements, and by giving higher priority to citizen centred scrutiny and governance (see Beecham).
- To support a National Partnership Forum for Older People that includes older people and provides expert and informed advice to the Welsh Assembly Government and other statutory bodies as well as improved linkages with local forums.
- To develop approaches in Wales that will promote a more positive image of older people.
- To ensure greater understanding and respect between the generations through an Intergenerational Practice Strategy for Wales.
- To increase the level and impact of older people's involvement in their communities.
- To promote social justice and develop and promote policies and programmes to tackle poverty and social inclusion amongst older people.
- To improve understanding of and focus on those who are *isolated* and with a disability, on Black, Minority Ethnic Elders and Lesbian, Gay, Bisexual and Transgender Older People so that services are delivered in a way that better reflects their differing needs.
- To influence and develop policies that impact on older people in respect of access to and the planning and development of the built environment.
- To develop transport that is responsive to the needs of older people including community transport as part of an

integrated transport system for Wales which includes planning, public information and availability.

- To encourage the use of assistive technology as a means of supporting independent living for older people.

Chapter 3

Changing Society - The Economic Contribution of Older People

This Chapter emphasises the economic contribution made by older people. This includes contributions beyond that achieved through engagement in the labour market, including caring and volunteering. It also highlights the importance of lifelong learning and skills development.

Background and Context

The Strategy for Older People recognises that the skills, knowledge and experience of older people are an asset to building the Welsh economy. With an ageing population and fewer younger people, the economy of Wales will need the experience and expertise of older workers.

Extending the working life for many people in physically demanding jobs may have a detrimental effect to their health and well-being. This should be given serious consideration alongside proposals for increasing the retirement age. However for many others, there are a number of advantages from continued employment. These include better income, more active lifestyles, improved well-being and reducing the risks of social exclusion and dependency later in life – and therefore reducing costs on public services. A need to maximise income and pensions for retirement through more flexible approaches to employment of older people is also a requirement. The benefits for employers in extending the working life of older people could be significant in terms of workforce planning, reducing staff turnover, maximising investment in training and learning, and thereby maintaining a flexible and motivated workforce.

However, considerable discrimination exists against older people, affecting their ability to find and retain employment. Many employers appear not to have focused on the role of older people to help with their skills and recruitment problems. Changing these attitudes towards older people is a fundamental principle of the Strategy and one which should receive substantial effort in Phase 2.

We also recognise that economic contribution is not just about paid employment. The economic activity of those who are 50+ should also be measured in terms of their life contributions, and not just the value of their employment. Unpaid volunteering by older people is worth an estimated £5 billion each year in the UK. Likewise older people invest considerable time and effort in caring responsibilities both for adults and children.

From the outset we recognise that this is an area that presents many challenges. ***We recommend that it is high on the agenda for Phase 2 of the Strategy.***

In discussing the evidence under this theme, we focussed on the following key areas:

- Economic inactivity at 50+
- Extended working life
- Life long learning and skills development
- Volunteering and caring

Economic Inactivity at 50+

Context

Economic inactivity amongst older people is a key issue affecting Wales. The over 50s in Wales are less likely to be in work or looking for it than in the UK as whole. Over 30% of those aged between 50 and the state pension age in Wales are inactive. Nearly two thirds of these are in receipt of incapacity benefits. There is a disproportionately large concentration of the economically inactive in the Objective 1 area, particularly the Valleys (totalling some 73,000 in this age group in 8 Valleys authorities). In some local authority areas 60% of this age group is economically inactive. This 50-65 age group is the only one in Wales for which economic inactivity rates have not fallen.

A number of projects have tried to address this issue such as the New Deal 50 plus, the work of Prime Cymru and ESF funded projects. Influencing employers to think in terms of their medium term workforce needs, the role of more mature workers and the skills they can bring offers a possible way forward. Experience of the New Deal and other employment programmes is that employer engagement is crucial. However, skill shortages apart, it can be

hard to get employers to participate purely from a social perspective. The argument needs to be made on sound economic and business reasoning.

The Age Positive campaign is a central element in the UK Governments strategy to eliminate age discrimination in employment. Launched in Wales in June 2004, it has done much to support Assembly objectives in these areas. The campaign uses a range of publicity tools, including national awards, to promote the business benefits of age diverse employment practices to employers. It encourages employers to make decisions that do not discriminate on the grounds of age.

Despite the good work undertaken in this area, we believe that more needs to be done, given that Wales' activity rates remain the lowest in the UK.

Evidence from the Consultation Exercise and Research

From the evidence provided to us we recognise that for many, the opportunity to retire with an occupational pension, whilst still in good health and to pursue their activities is perceived as an important element of social progress. However, those with small private pensions are often just above the level to receive a range of benefits.

We also heard that older people expect to experience age discrimination by employers which may explain why more people over the age of 50 are not actively seeking work. Age prejudice in employment affects older workers by undermining their confidence, sapping initiative and motivation and subsequently producing poor psychological well-being. In addition strategies are needed to develop age friendly work places. Initiatives such as Age Positive and PRIME Cymru provide good examples of work that seeks to overcome discrimination in the work place.

Ill-health is an important factor in ceasing to work, particularly for those in lower social class groups. Unfortunately it is also less likely that a return to the workforce will occur after more serious illness or disability. Yet there is a relatively high incidence of low level health problems which, with the right support, individuals can learn to manage more effectively and thus support themselves to return to work.

For men, other reasons for leaving early include redundancy, dismissal, lack of jobs, and discrimination. Women are more likely to exit the labour force due to family circumstances such as caring for children, spouse or older parents. Other disincentives to returning to work include the increased likelihood of receiving lower wages than when previously employed, loss of benefits and expected costs related to a return to work.

Our view

This agenda impacts on many policy areas. Inactivity between the ages of 50-65 can lead to real financial problems and an inability to plan for retirement, resulting in more pensioners in poverty at a later stage. It also has a detrimental effect on quality of life, self esteem and well-being and should be given a high priority for the next phase of the strategy.

Age discrimination is also a factor which affects the ability of this age group to find and retain work. Whilst new legislation will support those 50+ we believe that more needs to be done to eradicate pre-conceived idea and perceptions. Many people in this age group have 20+ years of work experience and this should not be ignored by potential employers.

We also recognise that there is a cross cutting relationship with disability. Although central government has developed a range of initiatives to encourage people back into the workplace, many are still caught in the benefits trap. Whilst we accept the health and social advantages to employment, we recognise that there must be an economic advantage to returning to work.

Local authorities have an important role to play and should be encouraged to address unemployment at 50+ through initiatives such as job fairs and self employment. This should be reflected in the local regeneration and strategy plans, reflecting the economic needs of the region. It should also take into account transport systems as, in many areas of Wales, this can further exacerbate unemployment.

Furthermore we suggest that the Assembly and others investigate the possibility of using European funding to tackle the many issues highlighted in this chapter.

Finally we recognise that there is no quick fix solution and recommend that future work by the Assembly in this important area should be supported by a robust evidence base. There is a need to ensure that the cross cutting links referred to are made at both central and local government level.

We suggest the following recommendations for Phase 2.

Recommendation 27	The Welsh Assembly Government should continue to work with the UK Government and Local Government in order to support the recruitment and retention of older people in employment and in the implementation of recent legislation to tackle discrimination in employment on the grounds of age.
Recommendation 28	Local authorities should be encouraged to address unemployment at 50+. Initiatives to meet the needs of this age group should be reflected in the local regeneration and strategy plans that mirror the economic needs.
Recommendation 29	The Welsh Assembly Government and Local Government should support/assist employers to strengthen those policies and practices that support returning to work in later life.
Recommendation 30	Maximising opportunities from EU Cohesion Funds in assisting the next stage of the Strategy should be examined by the Welsh Assembly and Local Government.
Recommendation 31	The Assembly should undertake research or literature reviews in order to support their future work in this area including the effect of an ageing population on the workforce.

Extended Working Life

Context

In Wales, those people over the age of 50 who are in work are more likely to be working part-time and tend to work slightly shorter hours than workers who are younger. Self-employment is also more common amongst older workers compared to the younger age groups and the self-employed are also more likely to work after the state pension age. In terms of economic value, people aged 50-65 contribute 25% of the national output.

For some people, working longer is an economic necessity. It is essential that older people are able to choose to engage in economic activity for longer. Companies that have encouraged the recruitment and retention of older workers have reported the success in their ability to re-train, reliability, lower staff turnover, flexibility and ability. There are a variety of active measures for the (re) integration of older workers into employment that could benefit from policy development. These include providing lifelong learning/training opportunities, flexible working conditions, adaptation of the work environment, encouraging a preventative approach to health issues in the workplace and supporting programmes to assist women into employment, such as those with caring roles.

Other options for employment in later life should be considered to provide greater flexibility over retirement ages and working hours, and perhaps increasing the opportunities for older workers to be employed in non-traditional capacities (eg “downshifting”). This reflects the reality that, for those nearing the end of their careers, investment in training is often harder to justify economically.

Our View

We feel that it is important to understand why some people retire before the state pension age and why others work up to it and others beyond it.

Poor health and stress are factors as to why some people retire early. Financial security and a desire for new lifestyles are also contributory factors. Subsequently we have concluded that the relationship of ill-health and its impact on employment should be considered in health strategies adopted by the Assembly and local government.

We also believe that flexibility for older workers in the workplace is crucial. There are some aspects of work that can be difficult for many people as they age, e.g. working night shifts. Also women’s working patterns are often different to men, and this needs to be recognised. Choice of employment should be equally available to those aged 50+ as it is to those below that age. However the extent of choice of employment is reduced for those with no/low qualifications, and this is further exacerbated in older age. Therefore life long learning is important as workers need to re-skill themselves. We conclude that the Assembly should consider the need to examine the employment practices of the private sector in

order to ascertain their policies on flexibility and retirement. The Assembly may wish to work with organisations such as the CBI, TUS, Chwarae Teg, etc.

We also discussed the transition into retirement and suggest that this should be gradual with, perhaps, a move to part-time or voluntary work. Proper planning for retirement including both a financial and health check could be beneficial to many.

We suggest the following recommendations for Phase 2.

Recommendation 32	The relationship of ill-health and its impact on employment should be considered in health and economic strategies adopted by the Assembly and local government.
Recommendation 33	The Welsh Assembly Government should consider developing a promotional campaign highlighting the value of older workers, the benefits of employment flexibility supported by examples of good practice.
Recommendation 34	The Welsh Assembly Government, working with employers, should consider ways in which employees can pass on their skills and experience in the workplace.
Recommendation 35	The Welsh Assembly Government should explore the establishment of a national pre-retirement programme to facilitate a healthy transition to later life.

Lifelong learning and Skills Development

Context

The opportunities for lifelong learning and skills development are essential for older people to participate fully in society and to remain economically active. Further education and learning can offer a positive contribution to quality of life and well-being. It may also promote the retention of independence for longer and provide protection for the ageing brain against cognitive decline.

Sector Skills Councils (SSCs) have a significant role in ensuring that employers give greater consideration to older applicants and to programmes for training/retraining older employees. The Welsh Assembly Government is ensuring that SSCs respond to the needs of older learners and take account of their training needs in the workplace.

Data for learners aged 50+ show variations in participation rates across different types of provision. Data for further education (FE) show an overall increase in the numbers of learners in the 50+ age range, from 46,447 in 2000/01 to 54,469 in 2004/05. This represents an increase from 20.2 per cent of the total number of FE learners in 2000/01 to 21.7 per cent in 2004/05. This level of participation also reflects the range of part-time provision in colleges allowing greater accessibility for older learners.

Within local authorities' adult community learning (ACL) provision, learners aged 50+ represent nearly half of all participants. In 2004/05, there were 25,595 learners in this age group, accounting for 45.3 per cent of all ACL learners. This represents a decrease from 26,287 in 2003/04, although the percentage of older learners participating remains unchanged.

Evidence from the Consultation Exercise and Research

Initial evidence from research commissioned by the Assembly's Department of Education and Life Long Learning and Skills suggest that older people participate in learning provision that is locally based and delivered in a non threatening environment. Older learners who have been successful in informal learning may demonstrate an interest in continuing with formal learning. In some areas substantial use is made of institutional provision; in others greater recognition has been given to the value of working in partnership with community based organisations and the voluntary sector.

Despite the benefits, a number of barriers to learning have been identified; these include poor health and disability, conflicting care responsibilities, lack of information, possessing few or no qualifications, inaccessible facilities and transport difficulties, lack of confidence, age discrimination and cost of provision. Barriers are particularly acute for those with low or no qualifications. In Wales, over 50% of adults aged 65+ report that they have not participated in any learning since leaving full-time education.

We also heard that opportunities for lifelong learning were felt by many respondents to the consultation to be a priority. In addition to the need to get people back into employment there is also a need for non-vocational learning opportunities that emphasise personal development and leisure. Learning for social reasons enables individuals to mix with others and share skills.

Our View

It is our view that there are two very different issues which need to be addressed. Firstly we accept that there is a need for learning opportunities leading to formal qualification and/or examination. This is right and provides a way for older people to re-skill and re-market themselves in the workplace. This in turn will lead to an economic return on the initial investment.

However, there are also many health and social benefits to learning which is quite distinct from the economic benefits. The Assembly should consider commissioning research in this area.

Recognition should be given to the value of non-accredited courses. These could lead people on to accredited courses. One of the challenges is to target those people who could often benefit the most, but who traditionally have been excluded, due to low income or low confidence about capabilities. Academic courses often have an initial assessment or interview, and this can be a real barrier to someone who lacks confidence. The financial cost of learning is a barrier for many older people and the Assembly should consider offering reduced or free opportunities to those on low income or benefits in retirement.

We believe there is need to promote more widely the benefits of lifelong learning. IT is an important factor. There have been successes with initiatives such as Meet the Mouse and Silver Surfers Week and this needs to continue.

Whilst progress has made we feel that there is room for improvement to ensure that life long learning is a reality for all and not solely linked to academic qualification or formal examination.

We suggest the following recommendations:

Recommendation 36	The Welsh Assembly Government should consider commissioning research on the full benefits of life long learning for older people
Recommendation 37	The Welsh Assembly Government should look at the barriers to life long learning and develop policies to overcome them
Recommendation 38	The Welsh Assembly and Local Government should consider jointly reviewing its charging policy with a view of reducing fees for older people.
Recommendation 39	The Assembly, Local Government and Sector Skills Councils should identify the skill development needs of over 50s both in the workplace and to re-enter the workforce. This includes the provision of learning support for the over 50s.

Volunteering and Caring

Context

As part of our deliberations we also discussed the issues surrounding volunteering and caring which is an often overlooked factor. Previously we mentioned that the economic activity of those who are 50+ should also be measured in terms of their life contributions, and not just the value of their employment. Many older people volunteer or are carers.

Caring responsibilities are common in people aged fifty and over, and grand-parenting is the main source of childcare for many families. The consultation exercise recommends that employers will need to be flexible towards older carers, recognising the needs of their dependants. Initiatives such as Age Positive and PRIME Cymru provide good examples of work that seeks to overcome discrimination in the work place.

Volunteer work can maintain inclusion, independence and provide a meaningful leisure activity. Older people have an enormous potential for voluntary work that can enrich their lives, benefit the organisation and contribute to society. Some of the consultation responses suggested that as people approach retirement they should be encouraged to take part in volunteering.

It is estimated that volunteering contributes an additional 25% to the Health, Social Care & Well Being budget. However, it is also known that changing work patterns and caring responsibilities for adults and children has already reduced the numbers of hours the 50 to 70 age group, in particular, is able to contribute. The expectations of this age group in relation to the amount, and type, of volunteering work they will be able, and willing, to undertake need further investigation. For example, for many people environmental issues may take precedence over supporting older people with health and well being matters. This includes further work on developing the volunteering opportunities available between the generations.

Through Strategy funding, local government and the voluntary sector are being encouraged to build on current practice and to work with others to establish local development centres for volunteering activities. The Assembly Government already funds a scheme to promote volunteering among older people as part of the Active Community Initiative. There is also core funding of the Community Service Volunteers (CSV) to undertake a Retired and Senior Volunteer Programme (RSVP) throughout Wales.

In Wales it is estimated that just under half a million people aged fifty and over take part in voluntary activity. 100,000 people in Wales regularly provide over 50 hours of care (unpaid) every week. Cost estimates for Wales show that:

- If the caring were paid for it would cost at least £1 billion a year;
- The value of childcare provided by grandparents is estimated at £259 million per year;
- The value of volunteering is £469 million per year

The combinations of extending the retirement age, a growing older population and the emphasis on care in the community will mean that in the future more older people will be taking on caring responsibilities. It is important that recognition is given to the important impact this has, and will continue to have, on the economy. It is clear that those in the 50 to 70 age group are increasingly required to make an economic contribution not only as part of the workforce, but also as carers of adults and children

and as volunteers. The effect of these different roles upon each other will need to be examined including the changing expectations of those in this age group.

We recommend that:

<p>Recommendation 40</p>	<p>The Assembly should support a review of volunteering programmes involving older people as a basis for further development of the active contribution of older people in society.</p>
<p>Recommendation 41</p>	<p>The Assembly should consider commissioning research into the future relationship between work, volunteering and caring for those aged 50+, including any changes in expectations as well as patterns and types of volunteering and caring.</p>

We further recommend the following revised strategic aims and objectives:

Strategic Aim

To promote and develop older peoples capacity to continue to work and learn and to make an active contribution for as long as they want.

Strategic Objectives

- To work with the UK and local Government to support the recruitment and retention of older people in employment including opportunities for flexible working.
- To work with UK and local Government in the implementation of legislation to tackle discrimination in employment on the grounds of age.
- To provide opportunities for older people, including as carers, to become economically active, to promote varied working patterns and to encourage the transfer of knowledge and experience from older people to others.
- To promote the benefits of learning and provide readily accessible information and advice to potential learners on learning opportunities available.

- To promote and develop the availability and accessibility of IT facilities and skills development in communities for older people.
- To increase the level and impact of older people's involvement in their communities through volunteering and incentives to participate actively in the planning and development of local services and infrastructure.
- To identify, develop and support the economic contribution of over 50s as employees, business people, carers of adults and children, volunteers and consumers.

CHAPTER 4

Health, Well-Being and Independence

The Assembly Government recognises that new ways of delivering policies, programmes and public services are needed in order to make a real difference to the people of Wales. Reflecting this principle, this Chapter presents a new approach to the Strategy, merging the two sections '*Living Longer and Healthier Lives*' and '*Coping with Increasing Dependency*'. Implicit in this new approach is the role of social care. This change was felt to be necessary so as to broaden out the previous Strategic aims, and to avoid duplication with other recent initiatives.

Background and Policy Context

The Strategy strongly supports the notion that many of the illnesses assumed to accompany older age are not inevitable or can be successfully managed. Preventive measures such as lifestyle changes late in life, disease management, improving service access and community interventions targeting older people (such as falls prevention) are effective in improving physical and mental functioning, together with improvements to the quality and duration of life.

For those who may need support, the provision of appropriate and good quality housing, health and social care services are crucial to maintain independence, mobility, health and well-being. Despite older people being the largest user group of health and social care services, often such services fail to address their needs adequately.

To achieve consistency in the availability and quality of health and social care for older people, the Strategy has been a catalyst for a number of significant policy developments.

Designed for Life describes the kind of health and social care services the people of Wales can expect by 2015 and how these can be developed. *Fulfilled Lives, Supportive Communities* is a 10 year strategy for social services in Wales. *The National Service*

Framework for Older People sets national standards to prevent ill-health, promote healthy and active ageing and good mental health, and to deliver quality health care and diagnostic services. It addresses threats to dependency, the establishment of intermediate care services, hospital care, stroke, falls and fractures, mental illness and medicines. Health promotion is a key standard within the NSF, and it specifies initiatives to address the social, economic and environmental factors that influence health and well-being. The *Healthy Ageing Action Plan for Wales* provides guidance for use at a local level on evidence based health promotion interventions for older people. The Beecham Review *Beyond Boundaries* is clear the quality of service delivery should be improved, and that public services must be more ambitious about involving citizens and engaging them in the design, delivery and improvement of public services. This embraces the central concept of citizenship within the Older People's Strategy.

We fully endorse these strategies and recommend that they are robustly implemented in a timely manner.

We recognise that health, well-being and independence is an area where perhaps the most progress has been made to date. However there are still areas that need more attention. During the course of our deliberations we discussed a wide range of issues relating to this theme. We have captured these under the broad headings of:

- Healthy Ageing
- Mental Health and well-being
- Social Services
- Housing
- Raising Standards in Care Homes
- Paying for Care

Healthy Ageing

Context

The Strategy aims to see that healthy ageing is an option for all older people in Wales. This is to be realised through a number of strategies and programmes including the *National Service*

Framework for Older People and the Healthy Ageing Action Plan for Wales and local Health Social Care and Wellbeing Strategies. The NSF includes evidence based standards on the promotion of health and well-being in older age. The Healthy Ageing Plan focuses on specific areas of health promotion such as physical activity, healthy eating, emotional health, smoking, alcohol, sexual health, health protection and safety promotion, and opportunities for raising awareness and general health screening.

Evidence from the Consultation Exercise, Interim Review and Research

A key theme arising from the Consultation is the need for the prevention of problems early on, before the acute stage or crisis. Services need to be more pro-active, for example by providing hand rails to older people suffering from musculoskeletal problems as soon as they are diagnosed. Good rehabilitation and re-ablement services, such as rapid response are essential. These services can help shift potential dependence back to independence. Such schemes often rely on partnerships, and it could be beneficial for the Government to provide guidance on joint commissioning.

The Consultation suggests that a priority for the next five years is the need to continue to tackle health inequalities and the needs of socially excluded older people. Activity and social engagement have been found to be protective for health.

We also heard that in terms of disease management, appropriate medication is essential for maintaining health and well-being, and should be considered a priority. People should not be denied access to medication that would be beneficial to them. Furthermore some of the respondents felt that there is considerable health promotion activity in Wales, and that a review of the effectiveness of projects and activities could usefully inform further development of successful schemes at a national level.

Our View

The Healthy Ageing Action Plan has been successful in raising the profile of health promotion initiatives for older people though we would like to see a review of the Plan to determine what has worked and where priorities should lie in the future. We proposed

that the timetable for this should coincide with the launch of Phase 2 of the Strategy.

There is also a need to ensure that existing initiatives/policies are fully rolled out and evaluated before moving on to the next initiative/policy. When introducing new policies, it is essential to consider what the Assembly/local government should dis-invest in and consider the related evidence base for change.

We agree that good nutrition is essential in older age. Many issues around this topic are addressed in the NSF for Older People. However we acknowledge that this may not adequately cover all concerns.

The use of medication is an issue for some older people, in particular over prescription and the effects of multi-use. Although that this is addressed in the NSF for Older People, we acknowledge that it is an important area that still requires further development.

Falls prevention is important and there are good examples of initiatives working in this area. We suggest that the Assembly consider ways of sharing good practice in this area and others.

The benefits of early interventions are well rehearsed but we recognise that there is as yet little evidence of cost effectiveness largely due to the lack of research. We suggest that the Assembly considers research in this area.

We also agree that dignity and respect should be an integral aspect of end of life care. Specialist hospice and palliative care services are experienced in the control of pain, but are limited within Wales and largely under-resourced.

Further work is required on addressing the social determinants of health that have a detrimental effect on health and well-being including for example, the need to maintain social networks as we grow older, reduces isolation, maximise income etc.

We also recognise that leisure, the arts and other cultural activities are an important part of quality of life in older age.

We recommend that:

Recommendation 42	The definition of <i>Well-Being</i> should reflect recent work on positive mental health in older age.
Recommendation 43	There needs to be recognition of the links between language, culture, tradition, faith, leisure, self-dignity, housing as well as the social determinants of health (e.g. poverty, deprivation and exclusion) on the one hand and health and well-being on the other.
Recommendation 44	The Welsh Assembly Government should consider undertaking research and evaluation on the design and impact of early intervention and preventative services including medium and long term cost benefit analysis, as the basis for the introduction of new services.
Recommendation 45	The Welsh Assembly Government should review the impact of the Healthy Ageing Action Plan to determine what has worked and where priorities should lie in the future. We proposed that the timetable for this should coincide with the launch of Phase 2 of the Strategy.
Recommendation 46	The Welsh Assembly Government and others should consider ways of ensuring that good examples of Falls prevention initiatives are shared throughout Wales.
Recommendation 47	The next phase of the Strategy for Older People should give more emphasis to tackling isolation and loneliness and the impacts of pensioner poverty on mental health.
Recommendation 48	The Welsh Assembly Government should consider an evaluation of the impact of the NSF for Older People.
Recommendation 49	The Assembly should give further consideration to malnutrition and food access issues in an ageing population.
Recommendation 50	The Welsh Assembly Government should consider increasing the frequency of medication reviews of vulnerable older people.

Mental Health and Well-Being

Context

Improvements to mental health and well-being will be achieved through the Strategy's broader initiatives that tackle social disadvantage. Likewise the *Healthy Ageing Action Plan* identifies areas that can have a positive impact on emotional health and well-being. The Strategy emphasises that the mental health of older people is a priority for the *National Service Framework* (NSF). In that document there are clear guidelines and standards for promoting well-being, early diagnosis of mental health problems and timely access to good quality services.

Evidence from the Consultation Exercise, Interim Review and Research

The UK Inquiry into Mental Health and Well-Being in Later Life highlights that mental health is a key factor of overall health and well-being. In its focus on mental well-being, the Inquiry emphasises a move towards the importance of positive mental health states, which to date have received less attention when compared to mental illness.

The examination of positive mental health and well-being in ageing research is reflected in measures of life satisfaction or happiness, and indicators of psychological well-being such as self esteem, resilience, mastery, control, purpose in life and efficacy. Recent work in the UK finds that life satisfaction is differentially affected by health, social, economic, lifestyle and psychological factors. As such, it is amenable to influence by government action. Well-being is also affected by health and safety, the availability of services, engagement in, and access to the community, facilities and opportunities available, social networks and support, age discrimination, faith, religion and spirituality, protection from crime and disorder.

Unfortunately good mental health is not achieved by everyone. Of all the mental illnesses, depression and dementia are the most significant in older age, along with the continuation of any other mental health problems experienced earlier in adulthood. Mental

ill-health can severely affect the independence and quality of life of individuals and their families.

Our View

Our first point is that it is important to consider mental health and well-being as a more holistic title that incorporates more than just depression and dementia.

We also agree that there needs to be a strong focus on mental health in older age at a strategic level, and that this should be an entity in its own right in the current mental health strategy for Wales. We suggest that the next phase of the Strategy should ensure that the Mental Health Standard in the NSF for Older People in Wales is robustly implemented.

We also recognise that mental health in later life is strongly related to life changes, such as reductions in social resources, bereavement and illness. As such we recommend that there is a need for holistic healthy ageing strategies.

We recommend the following:

Recommendation 51	Local Government working with the NHS should promote wider recognition and understanding of mental health and well-being for older people.
Recommendation 52	There should be a robust implementation of the Mental Health standard of the National Service Framework for Older People in Wales, and separately following consultation, the Mental Health Promotion Plan for Wales.

Social Services - Dignity and Respect

Context

A vision for future health and social care services in Wales is outlined in *Designed for Life*. A complementary Strategy for Social Services *Fulfilled Lives, Supportive Communities* was launched on 28 February 2007. Remaining part of local government, modernisation, supporting people earlier and the provision of high quality, accessible and personalised care are emphasised in this Strategy. This reflects the fundamental principles of the Strategy for Older People.

Dignity and respect are integral to the Strategy. Despite best efforts to date, all too often we hear of older people receiving health and social care services that deny their basic rights as human beings. This was recently highlighted in *Living Well in Later Life*, the review of the NSF in England. In Wales it is anticipated that dignity and respect will be achieved through two standards that cut across the whole of the NSF: Rooting out Age Discrimination and Person Centred Care. We strongly endorse the implementation of these standards.

Evidence from the Consultation Exercise, Interim Review and Research

We heard a wide range of evidence and research material in respect of social services and have attempted to focus on the key elements for the purpose of this report.

The current emphasis is now on assisting older people to remain in their own homes. Across Wales, the number of people aged 65+ supported in their own homes is 114 per 1,000. This compares to 28 per 1,000 of the same age group in residential care. The Kings Fund reported on a major investigation into the long-term demand for, and supply of social care for older people in England. Despite the emphasis on community care, it reports that community-based services are scarce, so there has been a tendency to provide services in a care-home setting. Yet older people prefer to receive care in their homes.

Recruitment and retention problems exist in the social care workforce in Wales (as in the rest of the UK). Low pay, poor conditions of service, the low status of home care work, increasing responsibility and stress are contributory factors. As a result of such issues, in 2001 an Assembly Government task and finish group provided a range of recommendations that included raising the image and profile of social care, designing and implementing suitable training schemes and treating the social care workforce as one sector.

The Consultation highlights that the funding of services was a cause of concern for many of the respondents. There was concern as to whether day care and home care services would continue to operate, with decreasing budgets and increasing demand. The new direction towards the development of lower level support was welcomed, but there is still the pressure to deliver services to

highly dependent people and the funding has remained the same. The costs of nursing care and the NHS role in providing continuing care was a serious concern. The Consultation also suggests that there needs to be improvement of essential services such as physiotherapy, chiropody, occupational therapy and dentistry.

Our View

We recognise that there are difficulties around recruitment and retention of care workers with the necessary skills, including staff working with older people and as such quality care needs quality staff. Care needs to be consistent and can be affected by staff turnover. Good training of social care workers is crucial. We also recognise that informal carers could benefit from training by health care professionals, particularly rehabilitation techniques. We also recognise that many carers are older people themselves. Older carers should be offered the range of services available to them as carers as appropriate, in line with the implementation of the Carers Strategy for Wales that will be re-vitalised in 2007.

Demand and expectations of services are increasing, so local authorities need to change delivery service models - a major cultural shift is required. There are still problems around partnership working. Health Act Section 31 powers to increase flexibilities between local government and the NHS has been under-used and we believe there is a reluctance to share resources under pooled budget arrangements.

We also believe, that in terms of citizenship, there should be early engagement of service users in respect of the service being provided to them. Furthermore the private sector needs to be engaged in the vision for future provision of residential and nursing care.

The final point we wish to make, which is relevant to the previous chapter, is that extended working life creates problems for people who are still working and who are also carers.

We recommend the following:

Recommendation 53	The Assembly needs to ensure there is robust implementation plan for the delivery of their ten year strategy Fulfilled Lives – Supportive Communities and that national and local performance management arrangements reflect progress on an annual basis.
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Housing

Context

The Strategy recognises the important function of housing in relation to healthy ageing and independence, and facilitated a National Housing Debate during 2004-05.

The outcomes of the Debate showed support in the following areas:

- Older people being able to follow their preference to live in their own homes as long as possible;
- The principle that independent living should be seen as priority wherever appropriate;
- Older people having increased choices and options;
- Older people being involved in the design of their properties;
- The Welsh Assembly Government and statutory authorities becoming more integrated and joined-up at the local level;
- Care and Repair services;
- Assistive technology/telecare;
- Extra care.

Concerns were also expressed in the following areas:

- For equity release to operate sensitively, with recognition of the needs of older people;
- Effective partnership working should be improved and increased particularly for services for people with dementia;
- A fundamental re-modelling of services was perceived to be needed as many existing sheltered housing schemes were no longer suitable.

Evidence from the Consultation Exercise, Interim Review and Research

During our discussion we heard a wide range of evidence and opinions on this subject and look forward to seeing the results of the further research commissioned by the Welsh Assembly Government.

In Wales, the rate of fuel poverty¹ progressively increases with age for people aged 60 and over, with the oldest occupants having the highest rates. Half of households with people aged 75 and over live in fuel poverty, and 12% are in severe poverty. Research shows that older people in fuel poor households have lower incomes, resided in older properties and lacked double glazing and central heating.

Evidence from intervention studies demonstrates how improving housing can improve health and mental health. Adaptations that increase competence within the house can positively contribute to the activity and well being of the older person and are hugely effective in restoring lost independence. Housing modifications can also reduce the risk of accidents. Simple changes to the home, such as handrails can reduce the risk of falling. Such 'lower level' repairs and adaptations are often particularly suited to the needs of older people.

The Assembly's consultation found that housing was identified as a priority by a number of respondents, particularly the availability of a choice of supported environments when needed. The availability of special forms of housing on the market that can meet the needs of older people may influence the choice to move or 'stay put'. A theme from the Consultation was that the insistence of building to 'lifetime homes' regulations should be emphasised by the Government, as this could potentially reduce the move to supported environments in the future.

A further issue from the Consultation is the need for planning to consider the need for older people to stay active through accessible transport links, adaptable housing and ensuring that shops and facilities are within the community.

¹ A fuel poor household is one that would need to spend more than 10% of its income on adequate heating, lighting, cooking and running domestic appliances.

Our View

There is a shift in pattern of home ownership. Now more people own their own homes, although the percentage reduces in the higher age brackets.

We believe that issues of design, accessibility and usability are crucial. Together with assistive technologies and a range of services, people can remain in their own homes for as long as is feasible. Tele-care guidelines have been developed by the Welsh Assembly Government, and local authorities are now looking at developing tele-care strategies.

Extra care is a model of care that fits well in Wales. There are a range of facilities in extra care that promote engagement, participation and well-being. Extra care could be a potential solution to problems with service delivery in rural areas. However we feel that there needs to be clarification around the differences between extra care, sheltered housing and residential care as many people are unsure of the differences.

The perception of crime in the neighbourhood is higher than the reality and we feel that the media can artificially inflate fear of crime - the outcome can be that people re-locate as a result, sometimes to settings that reduce their independence. There is need to ensure that there is a balance between perception and reality.

Furthermore, we discussed the issues surrounding equity release and conclude that current schemes do not provide sufficient safeguards for many people. More needs to be done through the Financial Services sector and endorsed by Government to develop specific watertight schemes. There may be a role for the Credit Union in future equity release schemes. We understand that Age Concern England is currently undertaking work on equity release and suggest that the Assembly may want to see their conclusions. Also Care and Repair Cymru has produced a good DVD on equity release.

Finally equity sharing is a potential solution to appropriate housing for older people. But very few schemes of this kind exist and therefore more work needs to be done in this area.

We recommend the following:

Recommendation 54	The Welsh Assembly Government should develop and promote a new vision on future housing options for older people.
Recommendation 55	The Welsh Assembly Government should continue to support multi-agency initiatives that tackle fuel poverty.
Recommendation 56	The Welsh Assembly Government should continue to support agencies that provide housing adaptations and advice.
Recommendation 57	The Welsh Assembly and Local Government, police and other agencies should continue to strengthen Community Safety Partnerships and ensure that there are adequate measures to reduce the fear of crime amongst older people.

Raising Standards in Care Homes

Context

The Care Standards Act 2000 (“the 2000 Act”) enabled the National Assembly to reform the regulatory system for a wide range of social care and independent healthcare settings in Wales. The Act also made the Assembly itself the regulator responsible for registration, inspection, complaints investigation and enforcement. These functions are delegated to the Care Standards Inspectorate for Wales (“the CSIW”). It also empowers the Assembly to set and issue National Minimum Standards (NMS) for those settings it regulates.

In adult social care, regulatory regimes and NMS have been established for care homes (both residential and nursing homes) and for domiciliary care. The purpose of the various regulations made to date under the Act has been to set the statutory requirements in particular settings that providers and their workforce must meet. The purpose of the NMS issued in those settings has been to outline:

- The minimum standards below which no provider may operate
- Ensure the protection of users and residents
- Safeguard and promote the health, welfare and quality of life of users

- Provide standards which are robust, measurable and enforceable, in order to achieve these aims

CSIW publish reports on inspections of care homes and domiciliary care agencies and based on its findings produce an Annual Report on the state of the care sector more generally.

A new policy to improve care standards is a user focused framework on handling complaints in local authority social services. The new arrangements require local authorities handling complaints to safeguard and promote the welfare of the service user and to ascertain and take into account the user's wishes and feelings. These important new duties apply at every stage in the handling of a complaint including the new independent third stage.

Evidence from the Consultation Exercise, Interim Review and Research

Figures from the 2001 Census show that 4.5% of people aged 65 and over and 20.4% of those aged 85 and over were resident in communal establishments in Great Britain. Research shows overwhelmingly that older people do not wish to enter residential care; however the factors that prompt movement indicate that older people move to satisfy care needs rather than for special accommodation.

It has also been shown that elderly nursing home residents receive up to four times as many prescription items as an older person living in their own home and there is evidence of inappropriate prescribing and adverse health consequences. Over medication, particularly in residential care and nursing homes increases the risk of falling and is a form of abuse.

In Wales, the Care Standards Inspectorate Annual Report (2005-06) states that although there is evidence of good practice within Wales, a significant number of homes gave cause for concern. This was in care planning, risk assessment, the management of medication and record keeping staff, training and proper support for staff.

For those who reside in communal establishments, it has been shown that attempts to maintain autonomy promote the

empowerment of the individuals and provide stimulating environments can improve quality of life. Well-organised facilities that promote both self-directed behaviour and provide support have been shown to lead to better levels of well-being and lessen the need for health services.

Our View

We have some concern about the future of residential care homes. It appears that there are now some very large homes (100 beds) being developed but care needs to be taken around ‘demonising’ care homes. They are necessary for a small proportion of the population.

Architecture and design is important in making large institutions more homely but preservation of dignity and respect and the quality of service are key issues, not whether the institution is large or small.

Denmark and Holland have produced good models of a mixed care and housing development and we suggest that the Assembly look at these countries as models of good practice. Furthermore, retirement/care villages, such as those planned and opened in Swansea, point the way for new models of living and care that would suit some people.

We recommend the following:

<p>Recommendation 58</p>	<p>The continuing improvement of quality of service in care homes should be influenced more by services users, by a more coherent and risk-proportionate regulatory system and by better commissioning practices to ensure dignity in care.</p>
<p>Recommendation 59</p>	<p>New models of care including extra care, tele-care as well as more intensive and lower level care should be developed as mainstream services. High quality care homes and particularly nursing homes for those with more complex and enduring care needs should continue to be a choice.</p>

Paying for Care

Context

This was an issue considered by the first Strategy Advisory Group in its report 'When I'm 64 ...and more' (2002). Subsequently, the first National Assembly accepted in Plenary, the principle of free personal care for older people on the basis of the Royal Commission on Long Term Care's recommendation that this should be a matter for UK benefits, taxation and inheritance policy. The UK Government has re-stated on a number of occasions that it is not going to follow the Scottish model of Free Personal Care, arguing instead that the priority for available funding on long-term care should be investment in improving the range and quality of services for older people. Currently in Wales we have neither the primary powers nor the funding (it would cost around £150m pa) to implement free personal care.

The Kings Fund report (2006) "Securing Good Care for Older People" made some far reaching recommendations for reform of charging arrangements for residential and domiciliary care. In the light of this report from the Kings Fund and related research by the Joseph Rowntree Foundation, Department of Health Ministers have set up a high level Task group to undertake a fundamental review of social care costs and charging arrangements. Assembly officials are keeping closely in touch with the work of the Task Group. This is a complex area and there are unlikely to be any quick solutions. Substantial changes to the current arrangements for charging for social care, as suggested by the Kings Fund, will require primary legislation and significant additional funding. In the light of the outcomes from the UK Government Task Group, the implications for Wales will need to be carefully and comprehensively considered.

Evidence from the Consultation Exercise, Interim Review and Research

Considerable disappointment was expressed in the consultation that the pledge for free homecare outlined in the 2003 Labour Party Manifesto has not been delivered. The Joseph Rowntree Foundation has been leading a debate about how to move towards better funding arrangements for long term care. It shows that the UK lacks an adequate system for paying for long-term care. This falls short in overall funding levels, with needs going unmet;

incoherence, with multiple funding streams creating confusing and sometimes irrational, overlapping ways of paying for care; and unfairness, in terms of the way costs and responsibilities are shared. Family carers often feel unsupported. Means-testing causes widespread resentment by taking away most of people's assets and income before they can get state help.

The public finds the present system incomprehensible and considers its outcomes unjust. Evidence suggests that people would be willing to pay more taxes, and potentially to make some private contribution to pay for a system that provided clearer guarantees that their needs will be provided for.

The Scottish arrangements are popular and perceived as fair. The biggest beneficiaries have been people on modest means and people with dementia facing high care charges.

Other countries have taken major steps to secure sustainable and stable funding systems. Germany and Japan, for example, have overhauled funding and integrated it into a single rational structure. Although tensions remain between growing demand and finite resources, these are being resolved in a clear-cut framework where open choices can be made.

The report concludes that some limited changes would start moving care funding forward to a better settlement, but this would not replace the need for more fundamental reform. Such reform would cost money (around £2 billion) but is required to create a sustainable system. The piecemeal change suggested would not resolve the underlying problems of today's funding arrangements. Fundamental improvements are required that create a fair, adequate and sustainable regime for long term care.

Our View

We recognise that free personal care is an emotive issue. It is about who pays, how much and when. The Royal Commission on Long Term Care has recommended free personal care on the basis of funding from changes to laws on tax, benefits and inheritance. Furthermore the UK Government is currently considering the Kings Fund and Joseph Rowntree reports and their recommendations to reform the social care charging arrangements. The Welsh Assembly Government will need to consider the implications of all of this.

We recommend the following:

Recommendation 60	Whilst the legal and financial issues surrounding the current care charging framework have to be recognised, a review of the position in Wales should be undertaken by the Welsh Assembly Government.
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We further recommend the following revised strategic aims and objectives:

Strategic Aim

To promote and improve the health, social care and well-being of older people through high quality, responsive and appropriately regulated services which enable older people live as actively and independently as possible in a suitable and safe environment of their choice.

Strategic Objectives

- To implement, monitor, and effectively review a multi-faceted evidence based action programme of health promotion for older people - the “Healthy Ageing Action Plan for Wales” alongside the current refreshing of public health policy and the development of Food Policy in Wales
- To implement the programme of reform set out in the Social Services Strategy for Wales, delivering high quality and responsive social services to vulnerable older people and promote their social inclusion and independence
- To implement a National Service Framework for Older People in Wales that addresses variations in standards of care and achieves greater consistency in the availability and quality of both health and social care services. This will be underpinned by the alignment of public protection measures across health and social care, including work towards a flexible and sustainable workforce based on integrated workforce planning, recruitment and retention.
- To promote through National Strategic Guidance on housing needs of older people, promote an adequate supply of accessible and usable accommodation that is suitably

located in relation to social, employment and other opportunities

- To ensure that older people – especially those with disabilities - have access to the help they need to remain in their own homes including timely access to heating, adaptations, repairs, telecare and other assistive technologies
- To promote the development of a range of domiciliary care, support and advisory services in Wales to offer older people choices in accessing effective support to maintain their independence.
- To promote the development of a viable, confident and responsive nursing care home sector which delivers quality services in Wales and includes more flexible models of care.
- To develop and improve policy, and the planning and delivery of services to secure better mental health and well-being for older people including preventing mental health problems in later life

CHAPTER 5

Structures and Delivery Mechanisms

Chapter 8 of the Strategy for Older People focuses on the implementation of the Strategy. The strategic aim is: “to implement the Strategy for Older People in Wales with support funding to ensure that it is a catalyst for change and innovation across all sectors, improving services for older people and provides the basis for effective planning for an ageing population.” This Chapter looks at current structures and delivery mechanisms now and for the future.

Background and Policy Context

From the outset the Welsh Assembly Government recognised that implementation of the Strategy could not be carried out in isolation but through meaningful partnership with local government, the voluntary sector, private sector, older people’s groups and older people themselves. Annual Assembly Circulars set out the framework for this to happen, including the broad priorities and the related grant funding arrangements. The Welsh Assembly Government made it clear that delivery of the Strategy for Older People must be driven from a local basis, taking account of the differing needs across Wales. This approach has been emphasised more generally in the recent Welsh Assembly Government’s response to the Beecham Review ‘*Delivering Beyond Boundaries*’. Achieving joined up and effective delivery of services to the benefit of older people is an important aim of the Strategy.

In addition the Welsh Assembly Government has promoted the development and use of a strong and effective framework for the direct and meaningful involvement of Older People and their representatives at all stages and levels. It has also developed new policies that have a direct benefit and impact on the lives of older people now and in the future. Progress has been reported publicly through an Implementation Plan (updated twice a year) and an Annual Report on the Strategy.

In this Chapter we look at the role played by the Welsh Assembly, its support bodies, local authorities and research to support policy development.

Role of the Welsh Assembly and its Support Bodies

Context

The Welsh Assembly Government role in implementation is to provide strategic direction and leadership for all statutory and independent bodies that work with older people and/or have an interest in planning for an ageing population. It also ensures that there is a strong research evidence base for the development of policies and plans in this area and to promote effective co-ordination of research funding and associated programmes.

We believe that solid progress has been made by the Assembly Government. Action has been taken to ensure that the foundations for developing the Strategy both nationally and locally are strong and that effective planning arrangements are in place. This partnership and joined-up approach has proved to be successful and needs to be further built upon for phase 2 of the Strategy.

Since the launch of the Strategy the Assembly has put in place a number of support structures. A Deputy Minister with specific responsibility for Older People has been in post since July 2003. This has ensured that the whole ageing agenda has been given focus at a ministerial level. An Assembly Cabinet Sub Committee has been established on the needs of older people to ensure a cross-cutting and coherent approach across ministerial portfolios. Membership includes the full Assembly Cabinet except for the First Minister and Business Minister. The necessary legislation to establish a Commissioner for Older People in Wales has completed its passage through Parliament and the National Assembly. It is expected that a Commissioner will be in post in autumn 2007. A National Partnership Forum for Older People in Wales has been established through a process of Public Appointments to provide a focus for debate about ageing and a source of expert advice to the Assembly.

The Assembly has also funded a range of support bodies to assist implementation on a Strategic level. The Beth Johnson Foundation is being funded to develop and implement a strategy for

intergenerational practice in Wales, and in 2004 a Welsh Centre for Intergenerational Practice was launched. Through their activities they have gathered a wide range of evidence of the benefits of intergenerational practice. A partnership agreement between the Assembly and the Welsh Local Government Association resulted in Better Government for Older People (BGOP) being funded to develop a Wales Network that will support local authorities work on the Strategy, extend good practice and facilitate collaboration through networking and sharing information. The Welsh Institute of Health and Social Care have received funding to work with local authorities to enable them to develop meaningful and workable partnerships and networks. The voluntary sector - in the shape of Age Alliance Wales, has established a co-ordination and development unit and has taken forward some very practical and worthwhile demonstration projects.

Evidence from the Consultation Exercise, Interim Review and Research

In relation to the Assembly's consultation exercise we heard that whilst many welcomed the role of the support organisations in principle as a means to initially implement the Strategy, concerns were highlighted about their operations, effectiveness and level of support. There was also a suggestion that there is an overlap between the organisations in what was being offered. Furthermore a specific issue from the 50+ forums was that they did not feel that the support organisations had been of any benefit "at the grass roots level".

The Interim Review indicated that:

Age Alliance Wales

- By the end of March 2007 14 different projects will have been completed, 2 conferences undertaken, local authorities visited and the profile of the Strategy raised in the voluntary sector and beyond.
- There was some difficulty in engaging with local authorities due to lack of people - many of the voluntary agencies are staffed by volunteers.
- There is a need to ensure that future projects become more outcomes focused.

- The next phase should see a move towards engaging with voluntary organisations not traditionally associated with ageing.

Beth Johnson Foundation

- The Welsh Centre for Intergenerational Practice was established at the University of Glamorgan. This provides development advice to projects across Wales.
- Ongoing development of an accredited distance learning course in intergenerational practice.
- Research examining the changing role of grand-parents in Wales.
- The initial plan for the BJF evaluated demonstration projects was not successful. This was re-negotiated with the Assembly for the BJF to run training programmes.
- Issues raised around limited funding from the Assembly and difficulties in completing all of the supporting activities. The BJF undertake support work in addition to what was funded.
- The BJF appears to have been successful in working with the Strategy co-ordinators.

Better Government for Older People

- Strategy co-ordinators are generally enthusiastic about BGOP's role, although the start had been slow for some in the first year. The co-ordinators particularly valued the national networking meetings (four per year).
- Development work with local authorities has been in response to requests (rather than a pro-active approach). However this is probably due to funding restricting the capacity of BGOP.
- There are some similarities between the work of BGOP and aspects of the Welsh Local Government Association's work with local authorities.

Welsh Institute for Health and Social Care

- WIHSC's original partnership development project aims to promote virtual networks that create opportunities for developing new services and projects outside the constraints of organisations. The interim review highlights an action research project, CHAIN, learning from which has informed the development of networking projects based within local authorities.

- The development of these projects has latterly been supported by WIHSC providing consultative, development services. The review states that this has worked best when there has been a goal or funding opportunity to work towards.
- By 2005-6 WIHSC had established a dialogue on network principles with all local authorities, and was working on development projects with 15 authorities.
- WHISC has been supporting intensive, focused work with 8-10 authorities at any one time.

Our View

We believe that the Assembly has made progress since the launch of the Strategy and certainly welcome the Ministerial appointment and the establishment of a Cabinet Sub Committee. We also feel that the Strategy support bodies are important elements in the delivery of the Strategy, though we suggest that their role and objectives be fully reviewed prior to the launch of phase 2. This is particularly important as there is a perception, following comments from the focus groups, that some of the support bodies duplicate structures and activities already in place. Also there is little recognition of their respective roles and outputs.

Recommendation 61	The appointment of a Minister with specific responsibility for older people should continue into the next phase of the Strategy.
Recommendation 62	The Welsh Assembly Government should review the role and objectives of its current National Support Partners.

Local Authority Structures

Context

Annual funding of £2.4m is available to local authorities with £770,000 'top-sliced' to fund the role of a local co-ordinator for each authority in Wales. Development of the Strategy at a local level has been strong. There is already a good local impetus behind implementation of the Strategy, with engagement of older people in the process given a priority in every area. Overall implementation of the Strategy has made good progress at a local level.

Structures at a local level do vary but in the main they include:

Local Authority Champion - each local authority has appointed an Older People's Champion from, mostly, within their local Cabinet. This ensures a cross-cutting and coherent approach across councillor.

Local Authority Co-ordinator - each local authority has appointed a local co-ordinator which is funded by the Welsh Assembly Government. Local co-ordinators are key to the development of the Strategy at the local level and have an important role to play in its implementation.

Older People Forums - Meaningful engagement with older people is crucial to implementation. The Strategy makes it very clear that it expects to see an enhancement in the engagement and participation of older people in society and at all levels of government. Local authorities have set up local forums for older people, utilised existing groups and established new older people partnership groups as part of their planning arrangements.

Evidence from the Consultation Exercise, Interim Review and Research

The Consultation highlights that the appointment of the Older People's Champions is generally considered a positive step though local authorities need much clearer specification about the role, remit and expectations of the Champions. Their remit should be greater than Social Services to ensure the wider aims are mainstreamed.

There is also a general consensus within the Consultation that the co-ordinators are crucial to the effective implementation of the Strategy. A key issue for the next phase is whether they would be better placed within the Chief Executive to enable mainstreaming of the Strategy across all areas. It is suggested by some that they have a higher profile in the local authority when situated there. Interviews with the co-ordinators for the interim review found that those placed within corporate policy units felt that this positioning had a number of advantages. Some of those within Social Services had concerns about being marginalised and felt at risk of being identified solely with health and social care issues.

Co-ordinators stated that they valued the contribution of the Assembly's Strategy office but that they required stronger national guidance and feedback from the Assembly, and response to their plans and reports.

Our View

We believe that local authorities have made real progress since the launch of the Strategy. Champions and co-ordinators have a crucial role to play in developing and implementing the Strategy at a local level. There has been some debate around the location of the co-ordinators. There is evidence to suggest that the co-ordinators would be better placed in the office of the Chief Executive rather than in Social Services. The former is more likely to facilitate a broad strategic approach with meaningful collaboration across many local authority departments. We would recommend that wherever they are based, they have the ability to ensure a broad strategic approach so as not to focus solely of health and social care. In order to support this they need to receive strong management support and leadership from the Chief Executive.

Whilst recognising the important task undertaken by champions, we believe that the role can differ from one authority to the next. Consequently we recommend that guidance is issued to local government outlining the role of the champion and expectations.

Finally whilst there has been an improvement in how local authorities engage with older people more needs to be done to ensure there is meaningful engagement. Also there remain challenging issues in reaching as many older people as possible, in particular, those in their 50s and early 60s, men, members of ethnic minority groups, the housebound and hard to reach groups. Therefore we recommend that guidance is issued on the engagement and participation of 50+ forums to local authorities and also plans are put in place to reach as many older people as possible.

We suggest the following:

Recommendation 63	Support for the appointment of co-ordinators and older people’s champions within local authorities should continue into the next phase of the Strategy.
Recommendation 64	Co-ordinators should retain a wide corporate remit in order to implement the Strategy. This may be most effectively undertaken by locating the function within the Chief Executive’s Department. However, wherever they are based, co-ordinators should have the ability to ensure a broad strategic approach and receive strong management support and leadership from the Chief Executive.
Recommendation 65	Guidance should be issued to local government outlining the role of the champion and expectations followed by records of achievement.
Recommendation 66	Guidance should be issued to local government on the engagement and participation of 50+ forums to local authorities and also plans put in place to reach as many older people as possible.

Research to Support Policy Development

An important aspect of the Strategy for Older People is that it is evidence based, drawing on diverse sources of research to enable an informed approach towards policy development. As highlighted in Chapter 1 our report has followed this example of good practice.

In relation to ageing, Wales has a good record in research, with some Universities benefiting from international reputations in Gerontology. Consequently there is a wealth of knowledge within the Welsh scientific community to draw upon. Whilst there have been recent EC ageing research projects led by Welsh Universities, there is not yet a significant body of research specifically on older people across all areas of Wales.

Within Wales the recently established Older People’s Ageing Research Network (OPAN Cymru) is a multi-disciplinary research network that aims to enhance the quality and volume of research on ageing, improve the integration of policy, practice and research, strengthen research collaborations across and within sectors, improve the co-ordination of research both across and within health, social care and clinical specialisms and to increase the participation of older people in the research process. The OPAN network has real potential to secure more effective co-ordination

and application of research on older people and to give direction for priority areas for future research.

Where policy development utilises proven experts to undertake research there can be confidence that the findings are the result of a rigorous scientific approach.

Our View

We acknowledge that research is required across a number of areas to both inform and monitor policy. However there is a need to ensure that there is no repetition or duplication of research effort. We believe that there is existing research and under-used data sets that can be utilised and further developed to assist the next phase of the Strategy. There is also a need to incorporate practice based research. This can be overlooked as it frequently falls within the 'grey literature' category. Identifying such work can be difficult as often it is not published through peer review journals.

There is also a need for robust dissemination strategies to ensure that research has a maximum impact. We acknowledge that research opportunities are often constrained by funding and time restrictions. The resulting limitations need to be recognised and fully considered when developing policies.

In fitting with the Strategy's principles of citizenship and engagement we welcome the opportunity for older people to be fully engaged in the research process, following the example of the collaboration between Age Concern Gwynedd a Môn and the University of Wales Bangor.

Recommendation 67	The Strategy should continue to be evidence based and draw on as many sources of information as possible.
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Implementation - Strategic Aim

To implement the Strategy for Older People in Wales effectively and robustly with support funding to ensure that it is a catalyst for change and innovation across all sectors, improves services for older people and provides the basis for effective planning for an ageing population.