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**FINAL REPORT**

**NSW Family & Community Services  
Carers, Ageing & Disability Inclusion**

Evaluation of the NSW Ageing Strategy

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## Abbreviations and Acronyms

<b>ACHR</b>	Australian Centre for Health Research
<b>AFCLGGS</b>	Age friendly communities Local Government Grant Scheme
<b>AHURI</b>	Australian Housing and Urban Research Institute
<b>ALRC</b>	Australian Law Reform Commission
<b>CADI</b>	Carers, Ageing & Disability Inclusion
<b>CALD</b>	Culturally and linguistically diverse
<b>COTA</b>	Council on the Aged (NSW Division)
<b>CPSA</b>	Combined Pensioners and Superannuants Association
<b>DDG</b>	Deputy Director-General
<b>DEC</b>	Department of Education and Communities
<b>DPC</b>	Department of Premier and Cabinet
<b>ED</b>	Executive Director
<b>FACS</b>	Family & Community Services
<b>GAP</b>	Global Access Partners
<b>HEAL</b>	Healthy Eating, Active Living
<b>ICT</b>	Information Communication Technologies
<b>IDC</b>	Interdepartmental Committee
<b>LGNSW</b>	Local Government NSW
<b>MACA</b>	Ministerial Advisory Committee on Ageing
<b>OWN</b>	Older Women's Network
<b>PAT</b>	Planning ahead tools
<b>POA</b>	Power of attorney
<b>PWI</b>	Personal Well-being Index
<b>TARS</b>	The Aged Care Rights Service

## Executive Summary

The NSW Ageing Strategy (the Strategy) was released in July 2012. The vision in the Strategy was that ‘People in NSW experience the benefits of living longer’. To this end, the goals in the Strategy were:

- Seniors lead active and rewarding lives and are valued members of the community
- Adults make decisions that support their independence and well-being later in life
- NSW responds effectively to the challenges and opportunities of population ageing.

The Strategy contained twelve ‘Highlight Projects’ which were initiatives that were targeted at those three aims. The Strategy also contained a comprehensive suite of ‘supporting actions’ which were programs and initiatives that were already underway within agencies.

The strategy was planned and implemented as a whole of NSW Government initiative with the Department of Family and Community Services (FACS) as the lead agency. The strategy was overseen by an Interdepartmental Committee of government agencies and non-government representatives. The change model underpinning the strategy is outlined in the outcome logic included at Appendix A.

### ***This evaluation***

This evaluation was commissioned by Department of Family and Community Services (FACS). The purpose of the evaluation was to:

- Critique the use of a ‘whole of Government’ Strategy to achieve policy reform
- Assess the achievements of the Ageing Strategy and specific projects
- Assess the impacts arising from the Strategy on:
  - individual behaviours
  - private sector markets
  - Government service delivery
  - Government policy reforms and procedures
- Assess how well the Ageing Strategy has been implemented
- Provide advice for future directions for NSW Government ageing policy.

The methodology for the evaluation involved

- Collating program data and approaches through interviews with the FACS team review of documents and project data;
- Developing a benchmark for assessing whole of government effectiveness by reviewing recent research on good practice in whole of government approaches
- Collecting data on older people in NSW, their awareness of the strategy and their well-being via a telephone survey of 800 people aged 50+
- Testing stakeholder views of the strategy through six focus groups held around NSW; and

- Gathering detailed stakeholder input through semi-structured interviews with members of the Interdepartmental Committee, the Ministerial Advisory Committee on Ageing and wider stakeholders (including peak bodies funded by FACS).

### **Evaluation Findings**

The findings of the evaluation are presented in four broad domains:

- Overall finding
- Strategic direction
- Impacts & outcomes
- Implementation

#### **Domain 1: Overall finding**

The NSW Ageing Strategy (the Strategy) has had a positive impact in promoting awareness of ageing in NSW and in improving the life circumstances of a proportion of older people.

#### **Domain 2: Strategic direction**

The broad strategic direction for the Strategy was appropriate, in terms of:

- **Framing** – the Strategy tackled the right issues; targeted different age groups in cohorts and focused on both immediate actions and helping people to plan better for later life. It was also appropriate to tackle ageing as a ‘whole of government’ issue. It could perhaps have been more ambitious if it had more resources.

A particular feature of the Ageing Strategy was the selection of highlight projects on the basis of:

- *A priority* – not necessarily the absolute highest priority, but nevertheless a priority for responding to an ageing population
- *An opportunity* – there was an identified opening to take action that meant that there was a reasonable chance of success
- *A willing partner* – there was an agency with expertise and responsibility for the activity that could lead or substantially support its implementation. The expectation was that other agencies would lead key projects, with input from FACS or other agencies as required and that FACS would lead only a small number of the projects.

The suite of projects was also a mix of initiatives that provided immediate services to older people (Elder Abuse Helpline, Tech Savvy Seniors, Community Transport trial projects) and ‘hooks’ that kept the issue on the agenda with an expectation that the shape of the initiative would emerge from the work by FACS and partners (Housing Choices, Work Skills).

This very pragmatic approach to project selection is important and is also supported by research, which indicates that ‘whole of government’ initiatives may need to be incomplete when they are first launched<sup>1</sup>.

- **Governance** – the governance arrangements, with a high level Interdepartmental Committee supported by officer level working groups were broadly effective. There may have been too many officer level committees and working groups for a small team to support. The Ministerial Advisory Committee on Ageing (MACA) has worked well although members of MACA indicated that there was still potential in the committee that was underutilised.
- **Systems** – the systems for managing the implementation of the Ageing Strategy were broadly adequate. Progress was monitored and reported. There was also enough flexibility to allow effective responses to emerging circumstances. The Strategy would have been improved with the inclusion of performance targets and an evaluation framework at its inception (a suggested outcome logic is included in this report).
- **People** – Key individuals played pivotal roles as champions for ageing issues in raising the profile of ageing and building a coalition of support for action. The team in FACS demonstrated an ability to build relationships and work towards shared goals. The contributing agencies were mixed in their ability to resource the highlight projects with appropriate staff – some actively engaged with the projects and provided dedicated staff, and some were not able to provide resources. Government stakeholders mostly indicated that FACS staff were a valuable resource and complemented the skills and experience of their own teams. There has however been substantial change in the structure and personnel in FACS recently which is a risk to sustaining the momentum of the existing projects.
- **Leverage relationships** – all the government stakeholders indicated that the relationships were collegiate and appropriate. The FACS team was able to use their relationships to help drive outcomes in several projects. The FACS team was not able to successfully influence two larger agencies and was limited in its ability to build effective relationships with the private sector.

### **Domain 3: Impacts & Outcomes**

#### **Population level Awareness**

One general outcome of the strategy is that a proportion of the population is aware of the strategy itself and the highlight projects. A survey of 800 older people selected at random across NSW

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<sup>1</sup> Keast, R., ‘Joined-Up Governance in Australia: How the Past Can Inform the Future’, *International Journal of Public Administration*, 34:4, 2014, pp 221-331

undertaken for this evaluation found that 14.4% of people ‘knew a lot about’ or ‘knew a little about’ the Strategy. Awareness of the six highlight projects directly targeting individuals ranged from 8% to 14%. Given the amount of promotion of the Strategy and the projects, this degree of penetration is reasonable, although there are no available benchmarks for similar announcements.

### **Individual Behaviour Change**

The behavioural change that can be attributed to the Ageing Strategy from July 2012 to December 2014 is modest but positive. Six of the projects sought to change behaviours and three of those six fully achieved their intended outcomes.

#### *Projects that fully achieved outcomes relating to behaviour change*

- **Tackling abuse** – the NSW Elder Abuse Helpline was established and promoted. The service received 2,133 calls to December, 2014 which is similar to the call volumes for the Queensland service in the equivalent start-up phase. 100% of callers were ‘satisfied’ or ‘very satisfied’; 85% of callers had increased their ability to respond to abuse of an older person ‘a lot’; and 44% of callers had increased their ability to identify elder abuse ‘a lot’ or ‘a little’ (based on a very small sample of 28 callers who responded to a survey for this evaluation).

The Helpline team also conducted 70 awareness and education sessions around NSW and the 322 attendees have indicated that the sessions have been valuable and relevant. For the education program, 90% of attendees reported that the information was presented well; 88% reported that the information was relevant to their needs; 88% were satisfied or very satisfied with the presentation/ facilitation of the session; and 84% indicated that the information would assist them to review/ improve their current work practices.

- **Tech Savvy Seniors** – FACS provided free or low cost training in new technology for 11,000 older people and a total of 17,000 training spots in community colleges and libraries. The program was rolled out in partnership with Telstra, which provided funding and training resources. Participants reported increasing their confidence in using technology, accessing information online and staying connected with family or close friends. A survey for this evaluation showed that 20% of people aged 65+ reported that they had increased their ability to use new technology over the last two years and it is possible that this project made some contribution to this change.
- **My life, my decisions** – This featured a mass market campaign, ‘*Get it in Black & White*’, promoting the awareness of wills, powers of attorney and other legal documents relevant to the end of life. A Newspoll survey found there was an 1111% increase in people writing wills (from 73% of the population in 2013 to 81% in 2014) and a further 6% increase in people stating an intention to write a will with a solicitor. A survey for this evaluation showed that 20% of people aged 50-65 had increased completion of legal documents over the last two years and it is possible that this project contributed to this.

### *Projects that partially achieved outcomes related to behaviour change*

- **Linking seniors to Information** – aimed to increase the use of the Seniors Card and website as an information hub for older people. A Seniors Card app was developed and has been downloaded 19,000 times and there has been a 36% increase in subscriptions to the email newsletters between December 2012 and July 2014. An approach to creating an integrated information hub, including updated website, is still being developed.
- **Travelling safely** – modest commitments to review the Older Drivers' Licensing Scheme and promote use of safer vehicles have been implemented but these were already underway at the launch of the Strategy. The findings of the review of the Older Drivers' Licensing Scheme were released in September 2013 and the recommendation was that the scheme be maintained. .

FACS also provided funding for six trial projects in community transport, which have achieved limited results in terms of changing older people's use of transport. The trial projects have provided data on the transport needs of older people, including older Aboriginal people and funded a transport service between Young and Canberra. The Passenger Transport Act has also been amended to include community transport which will help drive reform in the sector.

- **Age-friendly local communities** – FACS provided 26 Local Councils with grants of around \$21,500 for: ageing strategies (10), access (9), recreation (6) and pedestrian plans (1). Of the 15 Councils that responded to a survey for this evaluation, the majority indicated that: their council was very likely/extremely likely to do more around ageing as a result of success in the grants scheme; the project had raised the profile of ageing in Council 'a lot' or 'a little'; they had made additional financial contributions to the project to supplement the funding from the program; and they had undertaken additional actions or initiatives (e.g. one Council applied for recognition as an age-friendly community from the World Health Organisation).

### *Projects not targeting behaviour change*

The six highlight projects which did not specifically target behaviour change were aimed at generating change as interim steps to other strategic outcomes, or were only in early development at the time the Strategy was released. These were:

- **Living active lives** – this project aimed to increase the physical activity of older people. There were a range of small promotional events, including 'Give it a Go', a program for older people to try new activities at sport and recreation venues during Seniors Week. This project was somewhat fragmented and its Steering Committee has recently been reshaped to help focus the project.
- **Work skills, workplace value** – this project was targeting employment of people aged 45 and over. NSW Department of Education and Communities rolled out a small program of subsidised training through community colleges. However, the role of the State Government in employment is uncertain and a clear focus for the project has not emerged. A partnership with Global Access Partners (a privately funded think tank), started in 2014,

has led to a Taskforce that is focusing on the proportion of people at risk of leaving work early because of chronic conditions (e.g. pain, arthritis).

- **Securing your future** – this project aspired to help people in their middle years to plan better for later life. The team undertook some scoping research, commissioned a literature review and focus groups and also engaged an advertising agency to develop a creative brief but did not resolve what the focus and activities of the project should be.
- **Public private partnerships for population ageing** – this was a commitment to work to developing partnerships with the private sector. A one-day forum was organised in Parliament House in 2012 which raised awareness but did not generate any new partnerships. Three partnerships emerged under the Strategy – with Telstra on Tech Savvy Seniors; with Global Access Partners for the GAP Taskforce on Productive Ageing; and with the Urban Taskforce, a peak body for property developers, for the publication of a journal on Seniors Housing (one off, about 5,000 copies). The joint publication with the Urban Taskforce was the only proposal that was initiated by the Government. The commitment to partnerships may have made it possible for the other two relationships to develop.
- **Housing choices** – this project aimed to improve information about housing for older people and raise the profile of the need for more seniors housing. FACS played a role in influencing the thinking of key agencies, particularly NSW Planning, around older people and housing. However, this has not resulted in a demonstrable output as yet, partly because proposed reforms to NSW planning legislation, including reforms of the state planning policy on seniors housing, have not progressed through the NSW Parliament.
- **Population ageing in the NSW Government** – this project aimed to raise the consideration of ageing in NSW Government processes. The Government commissioned a useful report on age-related expenditure. Interim steps were also taken to developing a ‘report card’ on the state of older people in NSW – key indicators and data sources have been identified but a report has not been drafted.

#### ***Domain 4: Implementation***

The implementation of the highlight projects was mixed: in terms of the effectiveness of implementation, one third are rated as high; one third as moderate; and one third as low based on the extent to which the goals were achieved, the projects delivered the expected outputs and the extent to which the projects were influential and generated change in the relevant domain or partner organisations (for the projects intended as ‘hooks’).

The factors influencing success were (Table X2):

**Table X2: Factors in the effectiveness of implementation of highlight projects**

	High	←————→	Low
Goal	Clear and specific		Undeveloped
Funding	Funding provided		No new funding
Partners	Willing partners who are actively engaged		No partners
Stakeholders	Actively engaged		Disengaged or not included
Concept	Well developed		Undeveloped
Focus	Targeted and specific		Broad and unspecific

It is important to also recognise that some of the projects were developmental and so were necessarily more speculative (i.e. may have had a lower chance of success). This is particularly the case for projects in the more important and more complex domains (e.g. transport, housing). This strategy demonstrates the value of a mix of projects, some of which are concrete and tangible and some of which are more experimental in nature.

***Cost of the strategy’s implementation***

The total cash expenditure by FACS on projects in the Ageing Strategy that relate to these results was \$6.375m (excluding salaries) from July 2012 to December 2014. This was matched by other agencies with funding of \$1.03 m across three projects – Tech Savvy Seniors, Get it in Black & White and Population Ageing in the NSW Government. There was also a considerable investment by FACS, other NSW Government agencies and stakeholders in working groups and Steering Committees for the highlight projects.

FACS also provided \$2.11m to four peak bodies between July 2012 and June 2014 (Council on the Aged; Combined Pensioners and Superannuants Association; Older Women’s Network; The Aged Care Rights Service).

Specific dollar benefits have only been quantified in a study for Tech Savvy Seniors. This found that for the total collective investment of \$1.55m, the social return was \$17m. Some of the assumptions mean that figure is slightly overstated; however, even assuming that the benefits are half of those estimated, the social return from Tech Savvy Seniors would be \$8.5m. It would be beneficial to quantify the benefits of some of the other outcomes from the Strategy (e.g. the dollar benefit of an increase in writing of wills by 1%).

***Role of Peak bodies***

FACS provides funding to 4 peak bodies/specialist ageing organisations in NSW:

- Council on the Ageing (COTA) NSW
- Combined Pensioners and Superannuants Association (CPSA)
- The Aged Care Rights Service (TARS)
- Older Women’s Network (OWN).

These peak bodies played a valuable role in the development of the NSW Ageing Strategy. Conversely, the NSW Ageing Strategy had guided the work of the peak bodies, including conducting research in both the areas of housing and transport need.

### ***Looking forward***

It is recommended that:

**R1.** the NSW Ageing Strategy be refreshed and strengthened in the following ways:

- Focusing on a smaller number of key issues, and within those issues targeting specific behaviours
- Using the *Influencer* model to explore a suite of options for each issue to increase the chance of success, particularly focusing on a specific behaviour as a target for action
- Suggestions for focus areas are:
  - *Housing* – creating more seniors housing; optimise the use of existing housing stock and actions that the Government can take to support older people who wish to downsize
  - *Transport* – helping older people use public transport as they approach an age when they stop driving
  - *Health* – all older people undertaking at least 150 minutes of exercise per week
  - *Employment* – work with employer bodies to identify possible incentives to encourage the employment of older people
  - *Local Government*- work with Local Government NSW to roll-out a program of mentoring and support for local Councils to develop ageing strategies and link with Councils who have already developed strategies

**R2.** ‘Supporting strategies’ be removed from the Strategy as they tend to be announcements of work that is already underway.

**R3.** Existing commitments be completed, specifically:

- Continued roll-out of Tech Savvy Seniors
- Continued funding for the NSW Elder Abuse Helpline and Resource Unit
- Additional campaign for ‘Get it in Black & White’ in 2015
- Support for the completion of the GAP Taskforce report and consideration of recommendations
- Older Person’s Transport and Mobility project in Transport for NSW, including 6 monthly progress reports to the IDC
- Round 2 of the local government grants.

**R4.** Forward projections of the impact of ageing and associated costs of intervention and non-intervention be developed using the ‘*Age Related Expenditure Across NSW Government*’ report as a foundation and other possible data sources (e.g. Intergenerational Report).

### *Framing and agenda setting*

**R5.** An IDC meeting be dedicated to a facilitated workshop on future priorities for action in light of the learnings from this evaluation, including possibly developing proposals for new funding for Cabinet consideration. These should be formulated into an outcome logic plan (as per Appendix A)

### *Governance*

**R6.** The number of IDC meetings be increased to three per year and suggest the IDC consider how to better use and direct the working groups that report to it.

**R7.** A system for the IDC to undertake ongoing monitoring and review of highlight projects through lead agencies be developed and implemented.

### *Systems*

**R8.** The initial Population Ageing Report Card be finalised within 12 months to provide a summary of the position of older people in NSW with an update every 3 years.

**R9.** A report on the NSW action plan for older people be prepared every 3 years, to capture key actions by each portfolio for older people. This could be aligned to the Population Ageing Report Card.

### *People and culture*

**R10.** Champions promoting ageing across four domains- political, governmental, and non-governmental and business are appointed with impact monitored regularly.

### *Leveraging relationships*

**R11.** IDC agencies specifically design, recognise and recruit for skills in leveraging relationships as part of any future Ageing Strategy Implementation team.

# 1. Purpose, scope and methods of the evaluation

## 1.1. Purpose and scope

The evaluation of the NSW Ageing Strategy was commissioned by Carers, Ageing and Disability Inclusion (FACS) in the NSW Department of Family & Community Services.

The purpose of the evaluation was to:

- Assess how well the Ageing Strategy has been implemented
- Assess the achievements of the Ageing Strategy and specific projects
- Assess the impacts arising from the Strategy on:
  - individual behaviours
  - private sector markets
  - Government service delivery
  - Government policy reforms and procedures
- Critique the use of a 'whole of government' strategy to achieve policy reform
- Provide advice for future directions for NSW Government ageing policy.

The key evaluation questions for the evaluation were (Table 1):

**Table 1: Key evaluation questions**

Domain	Key questions
<b>Overall strategic direction</b>	<ul style="list-style-type: none"><li>▪ To what extent has a 'whole of Government' Strategy been effective in generating change?</li><li>▪ To what extent has the implementation delivered on the key objectives?</li><li>▪ How effective was the targeting of population groups (seniors/ middle years)?</li><li>▪ How effective were the governance arrangements in leading change?</li><li>▪ What is known about the overall cost/ benefit of the Strategy?</li><li>▪ What are the key lessons from this approach?</li><li>▪ What are the opportunities for further action?</li><li>▪ Would a more focused approach deliver better outcomes?</li></ul>
<b>Impacts on key groups</b>	<ul style="list-style-type: none"><li>▪ What individual behaviour change occurred as a result of the Strategy?</li><li>▪ What impact did the Strategy have on private sector markets (new services, new ideas, new partnerships)? Were there opportunities in the private sector that haven't been followed through?</li><li>▪ What impact did the Strategy have on services delivered by other NSW Government agencies?</li><li>▪ What impact did the Strategy have on policy development in other NSW Government agencies?</li></ul>
<b>Implementation</b>	<ul style="list-style-type: none"><li>▪ Has the Strategy been implemented as intended?</li><li>▪ What has facilitated effective implementation, and what have been the barriers?</li></ul>

The Evaluation Plan was reviewed by FACS and the NSW Ageing Strategy Interdepartmental Committee in July and August, 2014 and the final plan was agreed on August 21.

## **1.2. Evaluation methods**

The evaluation used a mix of methods to gather and analyse performance data.

### **1.2.1. Interviews with FACS staff**

Semi-structured interviews with FACS staff were used to explore the history of the Strategy, its current context and the current status of implementation. These interviews established an initial picture of the process for developing the Strategy, the roles of the stakeholders, what had already been achieved to date and the team's initial views of what the future directions might be for the Strategy.

### **1.2.2. Document review**

We completed an initial review of the Ageing Strategy, the Implementation Plan (October 2013), the Strategy Update (March 2013) and the consultations report (February 2012).

The evaluation reviewed other relevant documents and data, including the NSW Long Term Fiscal Pressures Report, 'An Ageing Australia: Preparing for the Future' (Productivity Commission, November 2013), relevant data from the Australian Bureau of Statistics and AIHW, Population Ageing Report Card and any specific project data.

A brief literature scan of models for 'whole of government' approaches and examples/ lessons learnt from similar strategies was also undertaken.

The purposes of the document review were to:

- map the current and projected context for the Strategy and the emerging policy responses
- identify gaps in information about specific initiatives which needed to be followed up in the evaluation data collection activities
- understand current thinking around broader 'whole of government' approaches.

### **1.2.3. Collation of project data**

We compiled data on the highlight projects implemented under the Ageing Strategy to answer the general question: 'How well has the Strategy been implemented?' As far as possible, work was not duplicated where it had already been undertaken to compile Strategy achievements reports; however, data supplied was interrogated to confirm its accuracy. Wherever possible, quantitative data (number of attendees; number of web downloads; project expenditure) was collated and this was supplemented with qualitative data when available. The output of this stage was a summary of performance for each project (Appendix B) and an overall summary of performance.

### **1.2.4. Semi-structured interviews**

We undertook a comprehensive set of interviews with key stakeholders. Specific questions for each stakeholder group were tailored to their role and scope of interest in the Ageing Strategy. Three broad groups were interviewed (a list of consultations is attached as Appendix F):

- **IDC members** – these interviews explored the higher level issues around the strategic intent of the Ageing Strategy and its effectiveness in driving change

- **MACA** – these interviews focused on the strategic intent of the Ageing Strategy, the role of MACA and its input into the development and implementation of the Strategy.
- **Wider stakeholders** – these were a mix of non-Government stakeholders plus representatives from organisations with roles in implementing the highlight projects. The questions for this group focused on the activities and outcomes of the specific highlight projects of relevance to the individual.

### 1.2.5. Exemplar projects

We have undertaken sub-evaluations of two projects:

- **Elder Abuse** – as an example of a project providing services directly to older people. The purpose of this evaluation was to identify the effectiveness of the helpline in providing practical information, advice and referrals to prevent or stop abuse of older people.
- **Age friendly local government grants** – to explore the extent to which a small grants program generates change in attitudes and awareness in the local government sector.

### 1.2.6. Survey

We surveyed 800 people in NSW by telephone in two groups - 50-65 years old and 65+ (**Error! Reference source not found.** 2). The purpose of the survey was to test the awareness of the community of the Ageing Strategy and projects; gather data on the well-being of older people in NSW compared to national data; and assess some specific behaviours relevant to the highlight projects in the Strategy (use of new technology; planning for later life). The survey respondents were selected randomly and stratified to align with the proportion of the population living in major cities, inner regional areas, outer regional areas and remote and very remote areas. The survey was administered in late September/ early October 2014. A copy of the survey instrument is attached at Appendix G.

**Table 2: Community survey - demographics**

Community survey respondents (n = 800)	
<b>Gender</b>	
Male	42.9%
Female	57.1%
<b>Age</b>	
50-64	46.5% (372)
65+	53.5% (428)
<b>Location</b>	
Major cities	50%
Inner regional	31.3%
Outer regional	12.5%

<b>Community survey respondents (n = 800)</b>	
Remote & very remote	6.3%
<b>Home ownership</b>	
Fully own home	72.4%
Paying a mortgage	13.5%
Renting or living rent free	10.5%
Refused to answer	3.6%

### **1.2.7. Focus groups**

We conducted six focus groups around NSW, three in the metropolitan region and three in regional NSW, with community groups that represent older people. This included one indigenous specific focus group in Dubbo. The purpose of the focus groups was to assess the extent to which the Strategy has addressed the needs and issues raised in the earlier consultations and to identify new and emerging issues and opportunities for future policy development. We worked with FACS to identify suitable locations, invitees and focus group questions.

### **1.2.8. Suggested outcomes logic**

We have developed a suggested outcomes logic for the Ageing Strategy (Appendix A). The FACS team had prepared a draft logic which we referred to in undertaking the evaluation, although it was not being used to guide the strategic thinking of the team. The suggested logic in Appendix A could be further developed by the team to help inform the development of the next steps.

### **1.2.9. Presentation of preliminary findings**

We presented preliminary findings of the evaluation at meetings of the IDC and MACA, which included discussion and exploration of issues.

### **1.2.10. Other related activities**

Westwood Spice will work with FACS to draft a journal article summarising the outcomes of the evaluation for submission to a relevant journal in the first half of 2015.

In parallel with the evaluation, Westwood Spice was engaged to deliver in-house training on evaluation methods and approaches for FACS team. This training was delivered in September and October, 2014.

#### **About CADI**

The NSW Ageing Strategy was developed in 2012 by staff in the then Office for Ageing (OFA), which reported to the Minister for Ageing and for administrative and managerial purposes was housed within the Department of Family and Community Services (FACS). As a result of an internal restructure, the Office for Ageing became part of the Carers, Ageing and Disability Inclusion (CADI) Unit in 2014. For the purpose of this document, these entities will just be referred to as FACS.

## 2. The NSW Ageing Strategy

The NSW Ageing Strategy was released by the NSW Government in July 2012. The Strategy comprises:

- **General principles** for an approach to ageing in NSW
- **Highlight projects** - twelve specific commitments by the Government that were new
- **Supporting projects** - a range of activities by NSW Government agencies that were related to dealing with an ageing population and which were already in place. To some extent the supporting projects were 'business as usual' activities which brought together existing commitments under the umbrella of the Strategy.

### Development of the Strategy

The NSW Coalition Government was elected into power in March 2011. The Coalition committed to developing an Ageing Strategy in the election campaign and so there was a clear mandate for action (although the specifics were not detailed).

When the Government came to power, a Minister for Ageing was included in the Cabinet. The first Minister for Ageing was Andrew Constance, who was also the Minister for Disability Services. Office for Ageing was administratively located within the Department of Family & Community Services (FACS) but reported to the Minister for Ageing.

The Office for Ageing at that time was geographically located in Tweed Heads (NSW Far North Coast) remote from the agencies that it was seeking to influence. During 2011, the Department decided to relocate the Office to Sydney. None of the staff elected to move to Sydney so OFA required complete restaffing under a new structure. This was both an advantage – in that there was a new, fresh team that could develop different approaches and a disadvantage – in that there was no corporate knowledge transferred to the new office.

Michael Woodhouse was appointed as the new Executive Director in March 2012. His first task was to complete the development of the Ageing Strategy, by then under a very tight deadline. The Minister's Office, focused on delivering on its election commitment, directed that the Strategy should be released by June 2012.

The Strategy was not well-developed at that stage. Some initial scoping had undertaken by OFA, when based in Tweed Heads, through:

- **An Ageing Round-table** where key players in the broader policy community came together at Parliament House to discuss key issues and identify possible directions.
- **Broad consultation** – the Nous Group was commissioned to undertake state-wide consultation and facilitated 17 community meetings across NSW, including two Indigenous specific meetings (one in Western Sydney and one in Dubbo). The consultation report identified possible key themes and issues that could be included in the Strategy. Staff in OFA however indicated that these were limited in their usefulness in guiding the Strategy as they were generally too broad and tended towards a 'shopping list' of possible options.

The Minister's Office played a major role in the development of Strategy in identifying key issues and reviewing proposed projects and approaches.

### **Framing of the Strategy**

Early drafts of the Strategy were framed around a number of key themes which built on those identified in the consultations plus work undertaken by OFA. The critical contextual issues at the time were:

- **Aged care** – care for ageing people, particularly affordable access to high quality care, was the primary issue of concern for the broader policy community around ageing. As the Commonwealth Government had taken over complete responsibility for aged care, including home care, by the time the Strategy was being developed, this meant that this issue was no longer part of the scope of the Strategy and the most contentious issue had been removed from discussion.
- **Personal responsibility** – the general philosophical position of the Coalition Government is that individuals are responsible for their own well-being, and whilst there is an important role for Government to provide support and assistance, there is also a need for individuals to make their own decisions. This philosophy has flavoured some of the thinking of the Strategy.
- **Impacts of ageing** – the proportion of the population that is ageing is increasing at relatively known rates. This is estimated to have impacts on key structural factors in the community, including reducing the proportion of the population that is working (and therefore providing services and generating tax revenue to support those who are not working) and increasing demands on services for older people (particularly health services, leading to increases in health costs). The view within FACS was that the current policy settings and cultural norms would adapt to these changing circumstances to some degree, e.g. people would choose to work longer, partly because they are healthier and able to work for longer and partly because there will be demand for their skills and experience. It was therefore important to pay close attention to the real impact of ageing and what is a valid and appropriate role for the State Government – and potentially to challenge some of the previous assumptions about these factors as our culture and economy change into the future.
- **'Whole of Government' action** – the Strategy was framed as a 'whole of government' initiative with FACS as the lead agency. It was clear that the impact of an ageing population would be across most NSW Government agencies both in terms of increased demand for services and support or demand for different and new kinds of assistance.

FACS considered a range of different approaches to developing the Strategy and eventually settled on an option that framed issues and actions in three groups: (i) projects that targeted people who are over 65 (so are in need of services targeted to their needs); (ii) projects that targeted people in their 'middle years' with a focus on better planning and decision making to ensure that they were able to age well; and (iii) projects that were targeted at the NSW Government around getting its own house in order.

In selecting projects and actions, FACS sought to cover all three of these broad domains of activity. The focus on the middle years was new and potentially significant, in that it takes an ‘early intervention’ approach that has been adopted in other areas of Government and applies it to ageing. The potential benefits of doing this effectively were considered to be very large. This in part shifted the focus of the Ageing Strategy from frailty (support for frail aged) to ageing well (support for people to live longer and healthier lives).

### Highlight projects and rationale

The Strategy at its heart is a suite of twelve ‘highlight projects’ which form its centrepiece. Table 3 outlines the brief scope and rationale for each of these projects. The projects were a mix of initiatives on a continuum from relatively well developed (where there was a project with a specific change model in mind and a focus on implementation) to undeveloped where the project was broadly conceived and there was no specific action to roll-out a service or program.

**Table 3: Highlight projects – scope and rationale**

Highlight project	Scope	Rationale
<b>Seniors</b>		
<b>Tackling abuse</b>	<ul style="list-style-type: none"> <li>▪ Helpline and resource centre to reduce abuse of older people</li> </ul>	<ul style="list-style-type: none"> <li>▪ High demand for support</li> <li>▪ Gap – not covered by any other service</li> <li>▪ Has been implemented in other states and proven to be effective</li> </ul>
<b>Tech savvy seniors</b>	<ul style="list-style-type: none"> <li>▪ Low cost training for older people to learn to use smartphones, tables and computers</li> </ul>	<ul style="list-style-type: none"> <li>▪ Urgent need – older people falling behind in ‘digital divide’</li> <li>▪ Partner available to develop and roll out training</li> </ul>
<b>Linking seniors to information</b>	<ul style="list-style-type: none"> <li>▪ Expand the existing Seniors Card program to provide access to government and local community information and involve seniors in developing policy and programs</li> </ul>	<ul style="list-style-type: none"> <li>▪ Existing card program very effective (self-funding; 1.2m members)</li> <li>▪ Effective direct connection to older people</li> <li>▪ Opportunity to expand its use and impact</li> </ul>
<b>Living active lives</b>	<ul style="list-style-type: none"> <li>▪ Increase participation of people 65 and over in sport and recreation by 10%</li> </ul>	<ul style="list-style-type: none"> <li>▪ Fitness has a direct bearing on living well or not living well</li> <li>▪ Consistent with other existing sport &amp; recreation programs</li> </ul>
<b>Travelling safely</b>	<ul style="list-style-type: none"> <li>▪ Investigate programs to encourage older drivers to drive safer vehicles; support local councils to deliver pedestrian access and mobility plans; review the Older Driver Licensing Scheme; and develop programs to help older people to use public transport</li> </ul>	<ul style="list-style-type: none"> <li>▪ Transport is a key factor in the well-being of older people</li> <li>▪ The point where an older person no longer has a licence is a significant point of change which can have a bearing on their well-being</li> <li>▪ There is a significant opportunity to improve the effectiveness of Community Transport in helping older people stay connected to their communities</li> </ul>

Highlight project	Scope	Rationale
<b>Middle years</b>		
<b>Work skills, workplace value</b>	<ul style="list-style-type: none"> <li>Target people in their forties and early fifties to access subsidised training programs</li> </ul>	<ul style="list-style-type: none"> <li>Research indicates that people who lose their jobs in their late forties/ early fifties struggle to re-enter the workforce and become dependent on others (e.g. welfare benefits); significant reduction in quality of life</li> </ul>
<b>My life, my decisions</b>	<ul style="list-style-type: none"> <li>Fund community education to increase the number of people completing wills, powers of attorney, enduring guardianships and advance care directives</li> </ul>	<ul style="list-style-type: none"> <li>Increasing the number of people with wills will reduce the number of estates to be managed by the state and people's intentions will be known</li> <li>Other instruments provide effective guidance to carers and medical professionals in supporting older people as they become more frail</li> <li>Willing partner (Trustee &amp; Guardian) available to develop and implement program</li> </ul>
<b>Securing your future</b>	<ul style="list-style-type: none"> <li>A community education Strategy targeted at people in their middle years regarding critical decisions that will affect their well-being in later life (work, housing, finance, social connections, health, lifestyle)</li> </ul>	<ul style="list-style-type: none"> <li>Better planning will lead to people living well longer</li> </ul>
<b>Population ageing</b>		
<b>Public-private partnerships for population ageing</b>	<ul style="list-style-type: none"> <li>Establish an open dialogue with the private sector to maximise the commercial opportunities resulting from an ageing population.</li> </ul>	<ul style="list-style-type: none"> <li>Significant opportunities for Government and the private sector to work together</li> </ul>
<b>Age-friendly local communities</b>	<ul style="list-style-type: none"> <li>Establish a grants program to help councils meet the needs of an ageing population</li> </ul>	<ul style="list-style-type: none"> <li>Provide direct support to councils to plan better for an ageing population</li> </ul>
<b>Housing choices</b>	<ul style="list-style-type: none"> <li>Support greater housing choices for the next generation of older people by improving information sharing on the future housing needs of an ageing population and monitoring the impact of existing planning schemes</li> </ul>	<ul style="list-style-type: none"> <li>Housing is a critical issue for older people and a fundamental element of people's well-being</li> <li>There are existing shortages of housing for older people, which will increase</li> <li>Mechanisms are spread across Government (Planning, NSW Housing) – need to find leverage points</li> </ul>
<b>Population ageing in the NSW Government</b>	<ul style="list-style-type: none"> <li>Incorporate consideration of the impact of new policy decisions on the long-term fiscal position of NSW; develop a population ageing report card incorporating key indicators of the state's progress in responding to population ageing</li> </ul>	<ul style="list-style-type: none"> <li>Raise the profile of ageing as an issue across Government</li> <li>Accurate and relevant data provide a powerful reference point – review progress and stimulate action</li> </ul>

### **Engagement with other agencies**

FACS liaised directly with other NSW government agencies in developing the highlight projects for the Strategy. Highlight projects were developed collaboratively with the intention that there would be a lead agency for each highlight project or major component of the highlight project. Some agencies were willing partners who were actively engaged; some were more reluctant because of limited resources to dedicate to projects. The draft Strategy was agreed with participating agencies before being submitted to Cabinet for approval.

### **Implementation**

The implementation of the Ageing Strategy is managed by FACS. For some projects, staff from FACS have led the development and implementation; for other projects, other agencies have been the lead with input from FACS. The choice of lead agency and the nature of the involvement of FACS has been dependent on the project and the most appropriate expertise and responsibility.

The implementation of the Strategy is overseen by an Interdepartmental Committee ('the IDC') with representatives from key agencies and some non-Government members. The role of the IDC and the overall approach to governance of the Strategy is discussed in more detail in Chapter 4.

### **Emergent and outstanding projects**

Whilst the primary focus of the FACS team was the Ageing Strategy, resources were also directed to 'outstanding' and 'emergent' projects.

- **Outstanding projects** were tasks that had begun before the Ageing Strategy was developed and may or may not have been relevant to the direction outlined in the Strategy. This included a stream of research grants, including the Workability project. These projects required resources and oversight, but were not directly related to the work of the team as they were commissioned previously.
- **Emergent projects** were projects that were not anticipated in the Strategy and developed over time e.g. support for the development of regional ageing plans for North Sydney and the North Coast.

These are common features of Government activities, where work that is underway at the time of a new Strategy cannot be stopped and new work that emerges is not anticipated at the time of the development of the Strategy as the context changes or new information comes to light. The challenge for FACS was to manage its own limited internal resources to ensure that it was maximising its effectiveness.

### 3. 'Whole of Government' approaches

The NSW Ageing Strategy has used a 'whole of government' approach, where FACS within the Department of Family and Community Services has been the lead agency coordinating activity across all NSW Government agencies.

There are four key questions for this evaluation arising from the decision to develop and implement the Strategy in this way:

- What is 'whole of government'?
- What are the success factors in developing and implementing a 'whole of Government' approach?
- What types of 'whole of Government' approaches are there?
- When is it appropriate to use a 'whole of government' approach?

The answers to these questions provide the frame for assessing some of the strategic questions in the evaluation of the Ageing Strategy.

#### 3.1. *What is 'Whole of Government'?*

The Commonwealth Government's Management Advisory Committee (MAC 2004) defined 'whole of Government' as public service agencies working across portfolio boundaries to achieve a shared goal and an integrated government response to particular issues. Approaches can be formal and informal. They can focus on policy development, program management and service delivery.

This is a useful definition and will broadly be adopted for this report. For the purpose of this report, this definition of 'whole of government' is taken to relate to the interactions of NSW Government agencies.

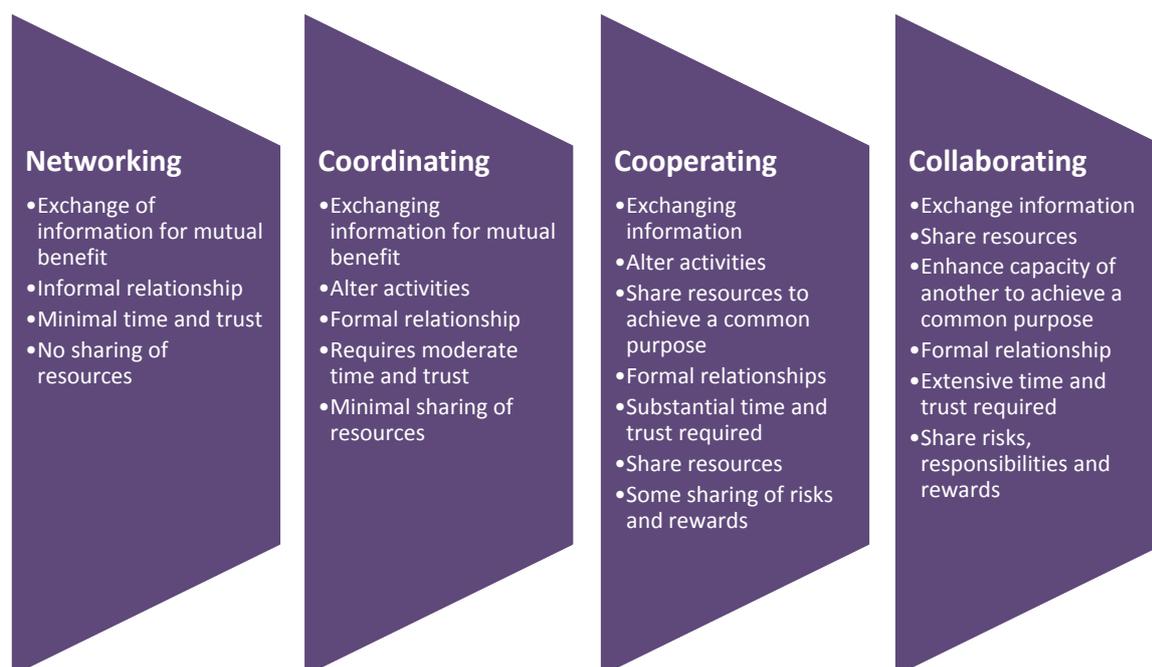
There are some important issues to consider in the definition:

- **Overlap with 'joined-up government'** – there has been a significant movement across Government, particularly in the UK, Australia and New Zealand, towards a notion of 'joined-up government'. This aims to integrate services and activities and avoid passing clients from one agency to another or clients not receiving support or services because they 'fall between the cracks'. Whilst primarily focused on service delivery, it has also been applied to broad strategies like counter-terrorism. There is significant overlap between the concepts of 'whole of Government' and joined up Government and some of the learnings from joined up approaches are relevant to 'whole of government'.
- **Umbrella term** – the literature around 'whole of government' approaches notes that the definitions are loose and that it is an umbrella term for a range of Government actions (Christensen and Laegrid, 2007). As a consequence, much of this literature is very general in nature with the discussion often abstracted to a very high level. It is also noted that 'whole of government' can be used as rhetoric with a risk that it leads to inaction or just 'business'.

Research indicates that structures, processes and relationships for different ‘whole of government’ models need to be matched to suit the intended purpose of the activity (Keast, 2011). For example, two Government agencies may have a loose agreement to share information about emerging issues and the arrangement may simply be for a quarterly meeting between two senior executives. At the more integrated end of the spectrum, there may be a Government commitment to major policy reform, which then requires formal structures such as a Joint Ministerial Committee, supported by a Committee of Secretaries or Department Heads with potentially a working group of Senior Executives – there may be shared performance agreements, specific funding, in some cases even a form of a contract or terms of agreement between the agencies.

The relationship between the parties in a ‘whole of government’ mode can be understood on a continuum from a distant, loose arrangement to a tight, well-defined relationship where there are shared outcomes and shared performance indicators (Figure 1). The nature of the relationship is a function of the context of each project and the issue it is trying to address; the structures and processes are also driven by the context.

**Figure 1: Relationship continuum for participants in ‘whole of Government’ contexts (Victorian Government, 2007)**



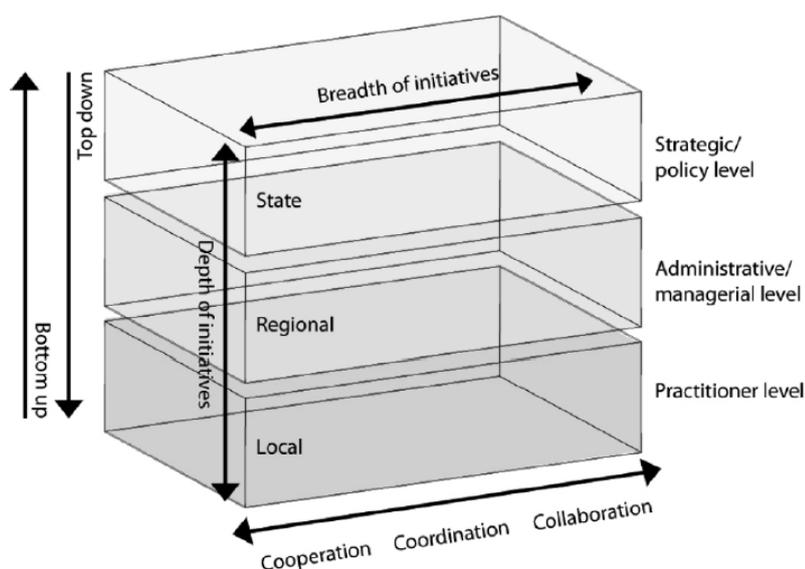
Definitions of ‘whole of government’ can extend to the engagement of non-Government partners in the design and delivery of policies and programs. This is continuing to evolve, particularly in the domain of ‘collaboration’ with some discussion emerging of approaches to ‘co-design’ (M. Stewart-Weekes, 2014) which potentially involves an even greater degree of involvement by the ‘users’ in policy and program design. It is possible that a fifth domain is emerging on the spectrum in Figure 1 that would be labelled ‘co-design’.

### Vertical & horizontal dimensions

The management of vertical and horizontal interactions in policy development processes has been recognised as a key dynamic in the process. The ‘vertical’ axis refers to the central, legitimate power of Government to make rules and decisions e.g. the Premier or Prime Minister making a public commitment to action. The ‘horizontal’ axis refers to the complex interactions between participants in the process, which may include other Government agencies, other Governments (e.g. national processes that involve negotiation with the Commonwealth or other states), community members, service providers and any other stakeholders. A normative policy ‘cycle’ has been developed, which steps through a logical sequence from identifying an issue through developing options, consulting with stakeholders and then making and implementing a decision (Althaus et al, 2012). ‘Real world’ policy processes are messier and more chaotic, involving considerable negotiation with stakeholders in various ways (Colebatch, 2006). Figure 2 outlines a conceptual model for how these forces interact. This is a simplification as there is further complexity in Australia, particularly in relation to interaction between the Commonwealth and State Governments (e.g. in Ageing, the Commonwealth directly funds some services for older people, so has a more direct connection to local service delivery and will sometimes get involved in ‘bottom up’ type reforms).

Successful policy development requires skills in balancing the competing vertical and horizontal forces and finding an effective path that uses these forces effectively. This frames a useful set of question for the evaluation of the Ageing Strategy – to what extent did the vertical direction of Government drive the development of the Ageing Strategy? Was the involvement of participants appropriate to this Strategy development process?

**Figure 2: Integration model which maps the nature of ‘whole of Government’ reform drivers (Keast 2011)<sup>2</sup>**

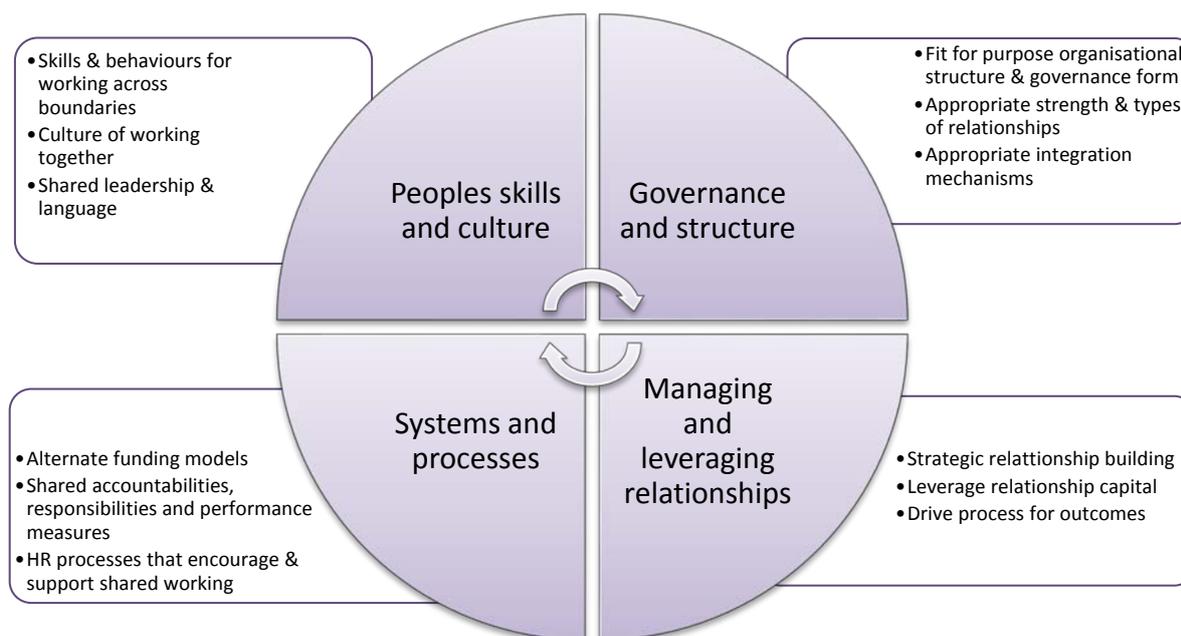


<sup>2</sup> Note: the order of cooperation and coordination are reversed in this diagram compared to Figure 1; there is some ongoing debate about the continuum outlined in Figure 1, however the basic concept of a continuum from looser to tighter arrangements is broadly accepted in the research.

### 3.2. Success factors in developing and implementing a ‘whole of Government’ approach

Keast (2011) has proposed a broad frame for success in ‘whole of Government’ approaches (Figure 3).

Figure 3: Success factors in ‘whole of Government’ initiatives



Based on a review of ‘whole of government’ or joined up government activity in Queensland, Keast found that ‘the most successful endeavours, in terms of both impact and sustainability, have been strategically designed to meet their purpose while extending their membership to government and non-government actors, have a strong management driver role and have augmented personal relationships with vertical connections to authority, thus ensuring ongoing legitimacy and access to resources’.

The salient factors for success relating to these different domains are:

- **Governance and structure** – successful joined up approaches draw from top-down and bottom-up models to shape hybrid arrangements which draw on the strengths of both – the key is to match structure with desired outcomes.
- **Leveraging relationships** – it is essential that time and effort be invested nurturing and building collegiate relationships even if the results are not immediately evident; it is also about strategic management of those relationships – developing relationships where they are required and maintaining them to achieve a desired outcome.

- **People and culture** – people with skills that reflect collegiality, such as respect, diplomacy and regard for others, as well as champions who actively support the initiatives and facilitate interaction. Other capabilities include the need for big picture thinking, flexibility and being able to work in emerging norms, roles and values; skills of engagement such as establishing rapport and genuine dialogue; and the ability to negotiate shared practices and outcomes.
- **Systems and processes** – alternative funding arrangements that support collaboration, combined with accountability and reporting regimes that reflect shared effort – shared performance indicators and extended decision making authority are critical.

Keast also concluded that ‘... successful initiatives appear to be those that were designed fit-for-purpose, matching the nature of the problem or intent with the correct level of connection and right integration mechanisms’.

This is useful but not complete, in that there is an important step in developing policy or designing programs in the conceptualisation or ‘framing’ of the issue or matter. For example, support for child care for pre-school children can be framed as being relevant to productivity (increase workforce participation for mothers) or education/ well-being (children attending day care have a more successful transition to school). Similarly, for ageing, the framing of ageing as an issue that impacts now on all NSW Government agencies and that impact is expected to increase, with a focus on ageing well (as a form of ‘early intervention/ prevention’) was an important feature of the NSW Ageing Strategy.

A related and important issue is that of agenda-setting – the process of determining what gets onto the agenda for public debate is an important part of a policy process (Colebatch, 2006; Althaus, Bridgman & Davis, 2012).

The question of how an issue is framed or conceptualised and then how it makes its way into public discussion is therefore an important factor as the wrong framing can be terminal for a Strategy or policy initiative (e.g. the Commonwealth Government’s Mining Tax under the Rudd Government, known as the ‘Resource Super-Profits Tax’).

These five domains (the four from Figure 2 plus ‘Framing/ conceptualisation’, Figure 3) provide a useful lens through which to evaluate the effectiveness of the NSW Ageing Strategy as a ‘whole of Government’ initiative – the relevant question then is: was the approach taken in the Ageing Strategy and the related development process the most appropriate approach in each of these domains for this context?

Figure 4: Domains for assessing ‘whole of Government’ effectiveness



A final important conclusion from Keast was that ‘... joined up efforts do not always have to be fully developed’. This is because of the complexity of the issues and the constantly evolving context, so that it may not be possible, or even desirable, to have a fully developed solution at the beginning of a ‘whole of Government’ process. Indeed, it may be preferable to have part-developed solutions or even ideas to take to the stakeholders/ partners in the process to help build appropriate responses.

### 3.3. Types of ‘whole of government’ approaches

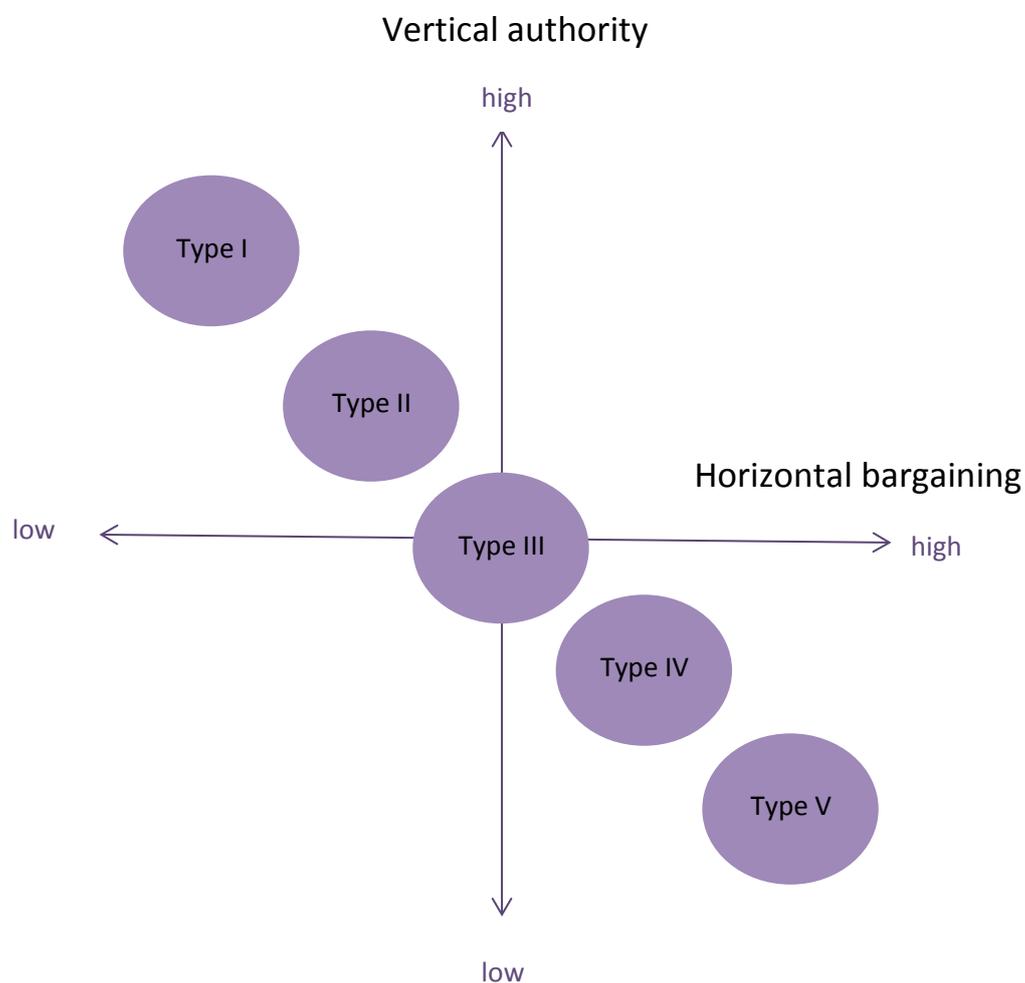
For the purpose of this evaluation, we propose a taxonomy of five broad types of ‘whole of Government’ initiatives (Table 4 and Figure 5). The dimensions of ‘vertical authority’ compared to the degree of ‘horizontal bargaining’ required to develop and implement a policy proposal generates the five types, which then influence (and to some degree determine) the process for developing the proposal. This is a useful analytical frame though the types could overlap to some degree for a specific issue or proposal.

Figure 5 shows that the vertical and horizontal domains are inversely related, so that as the degree of vertical authority increases, the need for horizontal consultation and negotiation typically decreases; conversely, with no or little vertical authority, there is a greater need for consultation and negotiation.

**Table 4: Types of ‘whole of Government’ approaches**

Type	Description	Examples
I	<i>Central government commitment</i> – a clear commitment from the Government to undertake action across all, or at least a significant proportion, of Government agencies (may depend on an electoral ‘mandate’ for that action).	<ul style="list-style-type: none"> <li>▪ Health in All Policies</li> <li>▪ Competition review – where all legislation was reviewed in all jurisdictions for its impact on competition (some exceptions were allowed)</li> </ul>
II	<i>Central agency</i> – a central agency (Premier’s Department, Cabinet Office, Prime Minister’s Department) takes the lead role in developing an initiative, with other agencies as participants; the initiative is often ‘handed over’ to a line agency to implement once it is established.	<ul style="list-style-type: none"> <li>▪ National Disability Insurance Scheme</li> </ul>
III	<i>Lead agency with vertical authority</i> – an agency is nominated as the lead agency for the jurisdiction, supported by a public commitment from the Government overall (public statement, legislation). Agency specifically has authority to direct agencies, although delegations may be unclear (e.g. funding and accountability may still sit with the Portfolio Minister).	<ul style="list-style-type: none"> <li>▪ FACS (and similar bodies e.g. Women, Aboriginal Affairs)</li> <li>▪ Sydney Metro Strategy</li> </ul>
IV	<i>Lead agency without vertical authority</i> – an agency has portfolio responsibility for an issue that impacts on other agencies and some form of integration would be appropriate, however there is no explicit Government mandate for this. Agencies develop their own agreements – these tend to be ‘work arounds’ and informal arrangements. These are often encouraged by the central agencies but can also challenge the central agency mechanisms (e.g. Cabinet Committees and budgeting processes) so may be ‘co-opted’ and become endorsed centrally with modifications.	<ul style="list-style-type: none"> <li>▪ Memorandum of Understanding between the Department of Community Services and the Department of Ageing, Disability &amp; Home Care (both now part of NSW Family &amp; Community Services)</li> </ul>
V	<i>Stakeholder initiated, no central authority</i> – stakeholders initiate reform for a range of possible purposes: improve service delivery; seek to redirect funding to other priorities; or raise the profile of issues. These can lead to local level changes or can significantly challenge existing policy and program settings, thereby triggering more formal policy or program reform and potentially gaining authority for change (moving to one of the other types).	<ul style="list-style-type: none"> <li>▪ Frontline service reforms</li> <li>▪ Campaign for bike paths in inner city areas</li> </ul>

Figure 5: Types of 'whole of Government' approaches by mechanism



The Ageing Strategy is Type III – where Family & Community Services, through FACS, was the lead agency. There was vertical authority in that there was an election commitment to have an Ageing Strategy, although this was limited in its mandate in that there was no legislative requirement and only limited new resources.

This has an important bearing on the approach taken by the NSW Government to developing and implementing the Ageing Strategy. This is explored further in Chapter 4 in the discussion of Framing and Agenda Setting.

The relevant features of the approach are:

- **Vertical authority** – there was a Government commitment to develop an ageing Strategy, which in principle created the opportunity for taking action
- **Horizontal 'bargaining'** – FACS, as the lead agency, was required to collaborate with the other agencies and other participants and this became the primary means of developing the Strategy.

### 3.4. When is it appropriate to use a 'whole of government' approach?

The overall message from recent research and experience is that:

- There is no one model of 'whole of Government' initiatives
- The most appropriate model will depend on the context and the issue, and the particular approach will be developed to suit that context
- The most appropriate administrative arrangements (e.g. governance) will need also to be tailored to the context and intent of the initiative e.g. looser arrangements for an informal context; tighter arrangements where more formal structures are required for accountability and expenditure.

The appropriateness and effectiveness of the approach taken for the Ageing Strategy will be considered in terms of five key domains:

- Framing and agenda setting
- Governance and structures
- Systems and processes
- Managing and leveraging relationships
- People and skills.

### 3.5. References

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## 4. Overall strategic direction

This section outlines the approach taken by the NSW Ageing Strategy in relation to each of the five domains identified in Section 3 and its appropriateness.

### 4.1. Framing and agenda-setting

#### 4.1.1. Approach

The concepts of framing and agenda setting refer to how an issue is shaped and brought into public debate.

For the ageing Strategy, the key features of the framing were:

- **'Whole of Government' issue** – ageing was identified as an issue that was broader than one agency or portfolio, so required an integrated response across many NSW Government agencies.
- **Cohorts** – the Strategy identified two broad population groups; seniors (65+) and a group labelled as 'middle years', the target ages being 50 to 65. People in the middle years were considered to require preparing for ageing. They were either in the work force or potentially still seeking work. The focus of the Strategy for this cohort was around raising awareness of ageing and taking action to be better prepared for being older. The seniors were people who were retired or had never worked and were facing immediate issues and concerns where some form of support or assistance may be required.
- **Ageing well** – as noted earlier, the Commonwealth Government is responsible for many policy settings that have a direct bearing on the well-being of older people: pensions (both rates and rules for accessing pensions); care for frail aged people (Home and Community Care support; funding for aged care facilities); and superannuation rules being the most significant. The NSW Strategy was therefore moving the focus from supporting frail aged people to 'ageing well'.

The intention of the Strategy was most clearly expressed in the selection of highlight projects where new initiatives were identified and funding provided. The criteria for selecting projects are therefore material to the discussion of how the issue of ageing was framed and in particular, which issues were on the agenda.

The consultation undertaken by the Nous Group in 2011 grouped key issues for ageing in NSW under three themes: liveable communities; participation; and discrimination, security and dignity. The top three priorities under each theme were identified as:

**Table 5: Themes from ageing consultations, 2011**

Theme	Priority
<b>Liveable communities</b>	<ul style="list-style-type: none"> <li>▪ Culturally appropriate services and information are available to older people</li> <li>▪ The design of homes is suitable for an ageing population</li> <li>▪ Communities offer programs that promote strong intergenerational links</li> </ul>
<b>Participation</b>	<ul style="list-style-type: none"> <li>▪ Older people, including their economic potential, are valued and they are encouraged to participate in the workforce for longer</li> <li>▪ Innovative transport options are available to supplement public transport</li> <li>▪ The economic contribution of volunteers is recognised and rewarded</li> </ul>
<b>Discrimination, security and dignity</b>	<ul style="list-style-type: none"> <li>▪ Positive attitudes to ageing are widely held and reinforced</li> <li>▪ Adequate services and technology are available to support ageing in place</li> <li>▪ Information about how to plan for later life is readily available and accessible</li> </ul>

This provided one input into considering where to direct the energy and resources of the Strategy.

FACS, in consultation with other agencies and the Minister’s Office, used a very pragmatic approach to selecting projects. Referring to the ‘types’ of ‘whole of Government’ structures outlined in Chapter 3, the Office was operating in a context where:

- There was ‘vertical’ support for an Ageing Strategy – an election commitment by the Government with the strong support of the Minister
- As the lead agency, FACS had authority to work with agencies but no levers to compel agencies to act (e.g. legislation)
- FACS had a small amount of money available to contribute to projects, but the funding was limited and finite (year to year, not guaranteed for multiple forward years, meaning that projects could typically be one-off).

Within this context, the Executive Director of FACS challenged the team repeatedly by saying ‘what are three things we could do, only one of which is a service?’ FACS was looking explicitly for points of leverage where small investments could generate larger returns. FACS consulted with other NSW Government agencies to look for opportunities where this was possible.

This developed into a working formula, where projects were generally selected on the basis of being:

- **A priority** – not necessarily the absolute highest priority, but nevertheless a priority for the target areas or issues.
- **An opportunity** – there was an opening to take action that meant that there was a reasonable chance of success.
- **A willing partner** – there was an agency with expertise and responsibility for the activity that could lead or substantially support the implementation. The expectation was that other agencies would lead key projects, with input from FACS or other agencies as required and that FACS would lead only a small number of the projects.

There were also a number of projects that were selected deliberately as a means of raising the profile of issues or keeping them on the agenda. In these cases, because of the limited time available to finalise the Strategy, it was not possible to develop ideas into projects with specific deliverables. Commitments around Transport and Housing are examples of this: for Transport, the commitments covered work that was largely already underway; for Housing, the commitment was very broad to 'improve information sharing' and 'monitor the impact of existing planning schemes'. These commitments were seen as 'hooks' to keep the issue on the agenda and ensure that the inter-agency processes paid attention to them. The Executive Director described the Strategy as a mix of 'immediate actions and hooks for future work'.

#### 4.1.2. Discussion

The framing for the Ageing Strategy was appropriate on several dimensions:

- **'Whole of government'** – it was appropriate to frame ageing as a 'whole of government' issue. The impacts of ageing affect multiple agencies and require joint and coordinated responses.
- **Right issues** – the Strategy address the right issues. Stakeholders, particularly the IDC, indicated that the Strategy covered the right set of issues and in interviews the most common issues raised were: housing; transport; health; and employment. These were all addressed in the Strategy in some way.
- **Cohorts** – the cohort approach was generally effective by marking out a difference between actions that were around providing an immediate service (for those aged 65+) and actions that were about encouraging people to plan for older age(targeted at 50 to 65 year olds). Two agencies, both larger Departments, indicated that the cohort approach was a good idea but came too late in the process to influence their own decision-making – these are agencies which, because of their size, require considerable time and internal consultation and the timing of the Strategy did not allow sufficient time for that consultation. One NGO stakeholder strongly rejected the cohorts on the basis that 'the middle years' do not exist and people generally think more in life stages - approaching retirement; about to retire; recently retired and still active; moving towards frail aged. This 'life stage' approach may be a useful development to consider in future strategies and was the approach taken for developing the targeted messages for the 'Get it in Black & White' campaign.
- **Pragmatism** – the pragmatic approach to selecting projects on the basis that they are more likely to succeed was generally successful. This can be contrasted with a project, for example, that may tackle the highest priority issue but have significant barriers, such as the need for major funding or the need to develop new legislation where there is not a mandate for change.
- **Including 'hooks'** – the decision to include some 'hooks' in the Strategy as a means of keeping issues on the agenda and using the profile of the Strategy to engage agencies and develop initiatives was appropriate. This is consistent with Keast's view that whole of Government activities do not (and potentially cannot) be fully defined before they are

publicly announced. The implementation of those projects is discussed further in Chapter 8 and in the Project Summaries (Appendix B).

- **Ageing well** – there was agreement by the IDC members that increasing the focus on ‘ageing well’ was appropriate, particularly given the limited role the State Government can play directly in some issues. There was less agreement about how effective this proved in that IDC members were not clear that ageing well actually had been the focus of some of the actions.

In one domain, it is possible that the Strategy was not appropriate – the scope of its ambition. Whilst the Strategy addressed all the right issues, some of the specific aspirations were relatively modest and reflected existing Government commitments. Equally at the outset there was no new money attached to the Strategy.<sup>3</sup> In subsequent years there was a specific budget allocation for the Strategy.

There is a difficult balance to weigh in this regard – ‘whole of Government’ strategies need to be aspirational, otherwise they are merely restating existing commitments. However, without specific agreements resolved with lead agencies, a Strategy is limited in what it can promise. The process of negotiating agency commitments can be a barrier to finalising a Strategy. More resources or clearer commitments from key portfolios on critical issues would have made it possible to increase the scope of the Ageing Strategy.

It is worth noting that the NSW approach is consistent with (and to some extent has had an influence on) the approaches taken in other states in developing an ageing strategy (see Appendix E for a summary of interstate approaches)

#### **4.1.3. Conclusion**

The approach to framing of the Ageing Strategy was appropriate. The strategy addressed the right issues, took an innovative approach to targeting cohorts with different needs and took a pragmatic approach to selecting highlight areas for focused action.

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<sup>3</sup> Funding for projects was initially sourced from money redirected from unspent staff costs.

## 4.2. Governance

### 4.2.1. Approach

FACS is responsible for the coordination of activity around the Ageing Strategy and in line with agency responsibilities is accountable to the Minister for Ageing. Major decisions are made through the Cabinet process.

The Strategy is overseen by an Interdepartmental Committee with members from relevant NSW Government Agencies and non-Government organisations (members are listed in Table 6 below). The IDC is supported by a range of sub-committees which focus on specific issues or projects. For its first 4 meetings up until April 2014, the IDC was chaired by the Deputy Director General of FACS or representative. The November 2014 meeting of the IDC was chaired by the Acting Director of Carers, Ageing and Disability Inclusion (two steps down in authority from the Deputy Director General). FACS provides secretariat support for the IDC.

In inviting agencies to participate in the Committee, FACS requested that the nominees for each agency be Deputy Directors-General or Deputy Secretaries. The IDC meets twice a year for two hours. This was a conscious decision by FACS to keep the number of meetings and their duration to a minimum, with a focus on substantive issues. There was a limited amount of time in each meeting allocated to 'accountability', to review progress on actions by particular agencies. The agendas for each meeting were intended to be supported by issues papers that would facilitate meaningful discussion.

**Table 6: Members of the Interdepartmental Committee on Ageing (by organisation)**

<b>Government Departments</b>	<b>Representative</b>
Premiers & Cabinet	Executive Director, Education, Family & Community Services Branch/ Deputy Secretary, Social Policy Group
NSW Treasury	Executive Director, Education, Family & Community Services Branch
Transport for NSW	General Manager, Efficiency & Effectiveness
Department of Planning and Environment	Executive Director, State Strategies
NSW Ministry of Health	Deputy Director General, Strategy & Resources
Finance & Services	Commissioner for Fair Trading
Trade and Investment, Regional Infrastructure & Services	Executive Director, Innovation & Industry Policy; Executive Director, Arts NSW
Education & Communities	Executive Director, Policy & Reform
Attorney General & Justice	Chief Executive Officer , NSW Trustee & Guardian
<b>Non-government</b>	<b>Representative</b>
Ministerial Advisory Committee on Ageing (MACA)	Kathryn Greiner (Chair)
NSW Council on the Aged (COTA)	Ian Day (CEO)
Local Government NSW	Noel Baum (Director, Policy)
Private sector representative	Kevin McCann (Chairman, Macquarie Bank)

The Minister for Ageing is also supported by the Ministerial Advisory Committee on Ageing (MACA). This is a standing committee that is charged with providing input and advice to the Minister on any ageing related issues. The Committee predates the present Government. MACA is currently chaired by Kathryn Greiner and has thirteen members. MACA members provided input into the development and implementation of the Ageing Strategy. Whilst they monitor progress of the Strategy, the Committee's remit is broader than just the Strategy itself. Kathryn Greiner, as Chair of MACA, sits on the Interdepartmental Committee and provides the linkage between the two bodies. MACA meets for half a day 6-8 times per year. FACS provides secretariat support for MACA.

Many of the highlight projects established Working Groups or Steering Committees (Table 7). The existence of these committees confirms the research which indicates that 'whole of government' initiatives take more work and more time than is anticipated. There were 17 committees or groups, each of which take time for meetings and require support. A few were only short term (e.g. for assessment of funding bids) but others have continued for the duration of the Strategy. This may have stretched the resources within FACS thinly as staff were occupied in many meetings and reviews. FACS has also chosen to dissolve and re-establish some groups as the role of the group has changed – the Steering Committees for Prevention of Abuse of Older People and for Participation and Ageing were both reconstituted in 2014.

**Table 7: Ageing Strategy - Working Groups or Steering Committees**

Committee/group	FACS Lead	FACS secretariat	FACS member <sup>4</sup>	MACA members
Prevention of Abuse of Older People Steering Committee	✓			
Tech Savvy Seniors Steering Committee	✓			
Tech Savvy Seniors Working Group	✓			
Participation and Ageing Steering Committee	✓			✓
Older Employment IDC Subcommittee	✓			
Securing Your Future Working Group	✓			
Planning for Later Life Forum (NSW Trustee and Guardian)		✓		
Age Friendly Local Government Grants Steering Committee (Local Government NSW)		✓		
My Life My Decisions Get it in Black & White Campaign Working Party (NSW Trustee and Guardian)			✓	
End of Life Implementation Advisory Committee (NSW Health)			✓	
End of Life and Law Resource Working Group (NSW Health)			✓	
Financial Abuse Working Party (Alzheimer's Association)			✓	
Mature Aged Worker Program – assessment of funding bids			✓	
Older Drivers Taskforce (NSW Transport)			✓	
Travelling Safely Working Group (NSW Transport)			✓	
GAP Taskforce Working Group			✓	✓
Guardianship Consultative Forum (NSW Civil and Administrative Tribunal)			✓	

#### 4.2.2. Discussion

The IDC members indicated that the IDC had been effective, with two members indicating it was ‘one of the better IDCs’. The factors that made it successful were: effective chairing; openness to discussion and challenge; and particularly the presence of the non-Government representatives (Kathryn Greiner was specifically mentioned by most of the IDC members).

The model of having a short meeting focused on high level issues was considered appropriate for the nature of the issues being discussed and the type of work that the IDC needed to do. However, there was a general concern that the time between meetings was too long and that issues lost momentum between meetings. Although members cautioned against meeting too frequently, the common ground appeared to be increasing meetings to three times a year.

<sup>4</sup> Working Groups or Steering Committees where FACS was represented but did not play a lead role

There was a sense from IDC and MACA members that there was potential to gain greater benefit from the process and that its potential had not been fully utilised. Several members indicated that ideas and proposals were raised in IDC discussions but appeared to not progress outside of the meetings.

Several members also indicated making use of sub-committees may have helped to progress issues between IDC meetings. However, as outlined above, there were already 17 sub-committees established and the limited staff resources in both FACS and in the other agencies were potentially overstretched by servicing the demands of the existing multiple committees.

Broadly, the representation on the IDC remained at the Executive level with the exception of the November 2014 meeting. This meeting had a smaller number of attendees and of those who attended, several were delegates of the IDC member. A possible explanation for this shift is that it occurred in response to FACS delegating the chairing of the meeting to a more junior manager. This may have signalled to member agencies that the IDC had become a lower priority for FACS. It is therefore important for FACS to send clear signals to member agencies about its own commitment to the IDC and the Ageing Strategy overall.

There are some other stakeholders in ageing issues who are not currently represented at the IDC whose involvement could be beneficial to the Committee. This would include NSW Police and potentially some representation from the Commonwealth Government (although it is noted that existing Ministerial Councils and supporting Committees are the primary forum for the consideration of State and Commonwealth interactions on ageing issues).

The 'private sector' was nominally represented on the IDC by one individual who has only played a minor role in the Committee. One stakeholder indicated that private sector involvement may be enhanced by inviting selected private sector representatives to attend IDC meetings to address specific issues and providing dedicated time in the agenda to that end e.g. a mini housing 'workshop' involving private sector invitees to discuss housing issues.

MACA members were mixed in their views about the effectiveness of their own Committee both in relation to the Ageing Strategy and their role more broadly. Some members were content that MACA is only advisory and so can only provide advice (not direction). Other members expressed frustration that their advice was either not considered or in some cases not requested and that better use could be made of MACA overall. There was also dissatisfaction in MACA around the secretariat provided by FACS – Committee members expected that there were more resources available in FACS to undertake work on behalf of MACA and so were frustrated that ideas and proposals did not progress as quickly as they hoped. It would be appropriate to have an explicit conversation within MACA about the available resources and how they can best be used to support MACAs aims and aspirations.

Apart from MACA representation on the IDC, MACA is only briefly mentioned in the Ageing Strategy. Once, in relation to involving the community in planning for population ageing where an action is to consult directly with older people including through the Ministerial Advisory Committee on Ageing. and once through the suggestion that better understanding of the views and perspectives of people in the middle of their lives about ageing could be achieved by appointing a younger member to MACA. This latter suggestion appears not to have been enacted.

### 4.2.3. Conclusion

The governance structures for the Ageing Strategy are broadly appropriate. The particular features that were effective were:

- a high level inter-departmental committee that included non-government members
- a small number of meetings each year, focused on strategic issues
- effective engagement from most of the participating agencies
- an approach to chairing the meetings that encouraged openness and genuine dialogue, reinforced by the presence of the non-Government members who encouraged frank and open conversations.

The recent delegation of the Chair of the IDC to Director level carries the risk of undermining the effectiveness of the IDC and changing it into a working group of Senior Officers. The poor attendance at the one meeting chaired at this level may have signalled to other agencies that the Ageing Strategy has become a lower priority for FACS. If the chair stays at this level and there is a similar level of attendance, the IDC will be significantly less effective in future.

The Ministerial Advisory Committee appears to have been broadly effective in itself but there was some frustration from the members that the Government had not made sufficient use of the Committee given the depth of expertise in the members. A closer alignment of MACA's activities and its principles with those of the Ageing Strategy will strengthen effectiveness going forward.

The implementation of the Ageing Strategy has involved the creation of multiple working groups and steering committees at the officer level. The existence of these committees confirms the research which indicates that 'whole of government' initiatives take more work and more time than is anticipated. Not only does allowance need to be made for these activities in planning the introduction of a 'whole of government' Strategy, they also need to be carefully managed. There is a risk that these working groups/ committees can absorb time without adding value to their projects and attention should be paid to ensure that they retain relevance and help to drive the intended outcomes.

## 4.3. Systems

### 4.3.1. Approach

As outlined earlier, it was expected that separate agencies would take the lead on highlight projects. They would then coordinate action involving FACS and other stakeholders with expertise or an interest in the particular issue.

FACS provided direct funding for a small number of projects. (This funding was mostly a redirection of existing funds.) Agencies also contributed resources from existing allocations (both money and people). Thus, there was no new funding provided for the highlight projects or related activities, although new things were funded and there was no 'pooled' funding in the sense of central agencies contributing to a pool of resources for the agencies to jointly allocate.

An Implementation Plan for the Strategy was developed in October 2013. This described major outputs, output milestones and anticipated milestone progress dates for the highlight strategies. The range of supporting actions being undertaken by individual agencies was listed, together with the lead agency and partners (where applicable), the key elements of the action and timeframes.

FACS maintained an update of progress on both the highlight projects and the supporting actions in the form of a spread sheet table. The status updates for the supporting actions were largely self-reported by agencies. FACS was involved in all the highlight projects so was able to monitor progress and identify issues through the project processes. There was a formal 'progress report' published in 2014, which reported on both highlight projects and supporting actions. The commitment in the Implementation Plan was to report annually to the Minister for Ageing and the Premier (meaning there would have been two reports to date). However, the first report was not completed until mid-2014 and the reporting process was drawn out and consumed a large amount of staff time.

There was also a suite of ageing related projects that were the sole responsibility of FACS, some of which were projects that had begun before the Ageing Strategy was released (e.g. the Workability Trial Project).

FACS was accountable to the Minister for Ageing for monitoring and reporting progress and this was managed in the conventional process (regular verbal and written reports to the Minister; briefing papers on specific issues; responses to Ministerial requests; briefing notes for house folders).

There was a commitment in the Strategy itself for a comprehensive evaluation of the Strategy (this document). Three of the highlight projects completed project reports and these reports have been an input into this evaluation. There was no specific requirement for each of the highlight projects to undertake any evaluation and it was not appropriate for all the projects. The three projects where reports were completed were:

- **Tech Savvy Seniors** – Telstra funded an evaluation of the project by the University of Melbourne, focusing on the social return on investment of the project.
- **Get it in Black & White** – NSW Trustee and Guardian commissioned a comprehensive evaluation of the project to assess the impact of the mass media campaign.

- **Age Friendly Local Government Grants** – Local Government NSW prepared a summary report of the activities of the funded projects.

#### **4.3.2. Discussion**

Key commitments in the Strategy have been delivered in that many projects have been implemented and have delivered outcomes. This broadly indicates that the approach was appropriate.

The systems also enabled the participants to respond flexibly to emerging issues. For example, the design of Tech Savvy Seniors was adapted to the changing circumstances and involvement of Telstra. (Had the systems and processes been more rigid, it is foreseeable that the approach from Telstra could have been rejected as being outside of the scope or intent of the Strategy.) Another example is the approach taken in the transport highlight project, where FACS has now funded a position within Transport to work on the travel needs of older people – this was not contemplated originally and has evolved from the interactions between Transport for NSW and FACS.

Overall, however, the IDC members indicated that there needed to be a greater focus on accountability across the board. One stakeholder commented that the reporting had ‘a bit too much of a FACS flavour’, which suggests that it did not sufficiently represent the work of other agencies.

Several IDC members noted that the Strategy did not include targets or any indicative performance framework. Specific targets could have been appropriate for some highlight projects and this may have helped guide or inform the implementation of those projects. For other projects, the targets would have needed to be aspirational or very broad in nature, given that the commitments were developmental (e.g. Housing Choices). An overall performance framework would have helped inform this evaluation and supported data collection from the commencement of the Strategy. FACS did commence the process of developing outcomes hierarchies for the Strategy and the highlight projects but this was not completed and was not used to track progress.

The 2014 progress report was an effective mechanism for reporting on interim outputs and outcomes of the projects. However, the process was reported to be overly time consuming and drawn out (for FACS, time in chasing agencies to provide input; for participating agencies, time in preparing the reports). It appeared that spending time and resources to compile the report in respect of , the ‘supporting actions’ component of the Strategy was unhelpful, in that it was reporting actions that were already underway (so adding no new value).

There has been only limited involvement by MACA in the ongoing monitoring of the Strategy and several MACA members indicated that they believed that MACA was not being used sufficiently. The evaluation team attended one MACA meeting and it was apparent that MACA was not aware of a wide range of activity that had been undertaken by Government that would have assisted the Committee in providing better advice and input. The MACA also noted that a stronger relationship with the IDC could help inform how best MACA could advise and support the Strategy.

#### **4.3.3. Conclusion**

The systems in place are broadly appropriate to ensure effective delivery of the Ageing Strategy. There were no mechanisms in place to generate additional collaboration such as shared performance indicators or shared budgets for specific projects with new funding.

The Strategy would have been better supported by clarity at the beginning of the Strategy around reporting arrangements and reporting frameworks. The reporting that existed appears to have emerged over time rather than being part of the design of the Strategy itself.

## **4.4. People and culture**

### **4.4.1. Approach**

As outlined in Chapter 2, the team in FACS that developed and implemented the Strategy was new. Team members had a range of backgrounds with many recruited from outside the State Government. Previous work experience included Local Government, non-government organisations and industry associations. The advantage of this was that as a new team it was open to new ideas and approaches; the disadvantage was that there was little corporate knowledge about past work on ageing in the team.

The FACS team was required to build effective relationships with their counterparts in other agencies. Within FACS, the new Executive Director (Michael Woodhouse) carried a significant load in setting a strategic direction for the team and building effective relationships across agencies.

Highlight projects relied on line agency staff who were the lead people for the project within their own agency. Characteristically, these were people with expertise and knowledge relevant to the project who had their own network of relationships within their own agency.

### **4.4.2. Discussion**

NSW Government stakeholders indicated that FACS brought both effective policy expertise and knowledge of ageing to their interactions. In contrast, however, one NGO stakeholder indicated that FACS staff were not sufficiently experienced in policy/ strategy development and had insufficient knowledge of ageing issues.

Stakeholders commonly indicated that two key named individuals had played a significant role in driving the development and implementation of the Strategy; Michael Woodhouse in building support at the agency level; and Kathryn Greiner, in liaising with Ministers, Members of Parliament and a range of non-Government participants. Stakeholders also noted that Ms Greiner had significant personal influence which she was able to bring to the ongoing discussion about ageing. The significant role that Minister Constance played in the development of the Strategy, was also mentioned; one stakeholder described him as a very 'hands on' Minister, which had contributed to the success of the Strategy in the early stages.

Stakeholders identified two potential weaknesses in FACS team:

- **Inexperience in project management** – there were concerns with the delivery of some projects (discussed further in implementation). It was indicated that more discipline around project management, particularly around management of external contractors, could have generated better outcomes.
- **Lack of experience in building relationships with the private sector** – whilst the FACS team were effective in working within Government, they seemed to be less experienced in

building relationships with the private sector. Despite a highlight project around ‘Public-private partnerships’, there was limited evidence of developing new relationships with the private sector or of knowing how to frame an issue or a project in a way that would effectively engage the private sector. A clear exception to this is the Tech Savvy Seniors partnership. However, this was a relationship which was built reactively as Telstra made the approach to FACS and there are clear lessons to be learnt from that process. There were opportunities for working with the private sector that have not been explored that could have been very fruitful (e.g. collaborating with insurance companies around lifestyle and fitness activities).

#### 4.4.3. Conclusion

Overall, the people engaged in developing and implementing the Strategy demonstrated skills in collaboration, building relationships and working collegiately, both in FACS and across the participating agencies.

The effectiveness of key individuals (Minister Constance, Kathryn Greiner, Michael Woodhouse) reinforces the importance of ‘champions’ to lead and drive change programs. These champions had a positive impact on the Strategy and the work undertaken around ageing. It is important therefore that their role and effectiveness is recognised in contributing to the overall process.

Recent changes in the team in FACS present a significant risk to the implementation of the Ageing Strategy. After a period of relative stability of around two years, a significant number of the staff have left the FACS team and not all positions have been replaced. From a base of 12 staff in September 2012, there are now seven staff in FACS, of whom two are new.

Significant change in the individuals in the direct line of management has also occurred, as part of a restructuring of the Strategy & Policy stream in FACS. This disruption has been further compounded by a change in several of the members of the IDC as a result of sector-wide restructuring of NSW Government agencies. All these changes have reduced the corporate memory and they raise several risks to the ongoing implementation of the Ageing Strategy:

- **Reduced capacity** – there are less people in FACS currently working on Ageing Strategy projects.
- **Temporary impact on understanding of the issues and relationships** – while policy staff are trained to be generalists and to be flexible to move across issues, where a significant proportion of a team is changed, there is a temporary loss of knowledge and a need to rebuild relationships.
- **Rebuilding** – as positions are refilled, it will take time to re-establish the understanding and culture. It is too early to draw conclusions about the nature of the culture that is emerging with the new team.
- **Commitment** – the new individuals may not have the same commitment to a Strategy and set of projects that they were not personally involved in developing. This is important in terms of the champions who will carry the issues forward in the next iteration.

Whilst these risks are present, it is too early to see the impact of these changes and how they will be managed.

## 4.5. *Leverage relationships*

### 4.5.1. **Approach**

There was a clear recognition and mandate that the staff of FACS needed to work effectively with other NSW Government agencies and stakeholders. Effective relationships were developed and nurtured on key projects, including Tech Savvy Seniors and Get it in Black & White. The factors that supported success were:

- **Shared goals** – stakeholders reported that the goals were clear and agreed within the context of each of the successful projects.
- **Openness and flexibility** – FACS staff were perceived to be open to ideas and suggestions and responsive to concerns from other participants. Telstra indicated that this was a particular strength of the relationship – that staff could suggest ideas which would be adopted and become part of the program.
- **Understanding of roles** – FACS and other participating agencies worked out effective and complementary roles. It is not apparent if this role delineation was made explicit as part of the early development of the projects (e.g. FACS to lead on policy development; partner agency to lead on implementation) but this was a contributing factor to the development of successful relationships.

With two projects that were focused on policy development and influence, namely Housing Choices and Travelling Safely, FACS staff developed a model for working with the agencies who were involved. The characteristics of the model were:

- look for common interest (e.g. for housing, issues around density and liveability)
- get to know the agency's industry, drivers and barriers
- use data to back up arguments
- be clear on roles (i.e. if working with junior staff, recognise that they are not decision makers)
- listen to other agencies' perspectives.

There was a small project developed jointly with the Urban Taskforce to produce a brochure targeting the development industry on issues around housing for older people. It was particularly focused on the opportunities and emerging approaches. This project was initiated by the Minister's Office with a small amount of input from agency staff in finalising the task.

There are some key areas where there has been limited success in leveraging relationships to make an impact:

- **Planning** – it was important for FACS to work with the Department of Planning and Environment around housing issues, although in retrospect it proved hard for FACS to be clear about what it was engaging with. The planning system was being reformed in this

period and any discussion about housing for older people was a small subset of much broader considerations. The economic reality of the Sydney property market is also outside the scope of influence of FACS. The context around housing worked against making an impact in this domain.

- **Transport** – as a very large agency focused on service delivery, it is a difficult and complex task to coordinate an integrated approach to ageing. Additionally, the process of planning in Transport for NSW is necessarily very long term so that the translation of awareness into action is a longer cycle than some other portfolios. Transport for NSW representatives indicated that the Ageing Strategy had not been very effective in raising awareness within the portfolio. (This has recently led to a changed approach -the funding of a temporary position within Transport for NSW to focus on older persons' mobility).
- **Living active lives** – the sphere of healthy living/ exercise is large, dynamic and fragmented, with activity in health promotion undertaken by multiple players, including the Commonwealth and State Government. There are significant challenges with no clear solutions. FACS was invited to participate in the 'Healthy Eating, Active Living' (HEAL) project being led by NSW Health and broadened the focus of the project from just children to including older people. FACS developed relationships with NSW Health, the Department of Sport & Recreation and a range of other stakeholders but has had limited success in turning these relationships into programs with demonstrable outcomes.

#### **4.5.2. Discussion**

Stakeholders confirmed that the FACS team had been effective in building relationships with their counterparts in other agencies. These were described as good working relationships, collegiate and focused on achieving a common outcome.

Several stakeholders mentioned key individuals as playing an important championing role in building relationships and networks – particularly Kathryn Greiner (in her relationship with Ministers and key stakeholders) and Michael Woodhouse (in building relationships with other agencies and key stakeholders).

#### **4.5.3. Conclusion**

The FACS team was effective in building relationships across government, particularly where there was a clear objective around particular projects. As a small team, it was harder for FACS to leverage relationships in large agencies where change invariably takes longer and relies on a greater number of individuals. There were some opportunities where relationships were not developed (e.g. work with NSW Fair Trading on financial literacy, or a range of possible partners around healthy living) which may have increased the reach and effectiveness of the FACS team.

## 5. Older people in NSW

### 5.1. Population data

This section presents a snap-shot of population level data about older people in NSW relating to the actions in the Strategy.

The intention is for the Ageing Strategy to lead to a long term improvement in the well-being of older people in NSW. Evidence for this achievement would be seen in population-level data in key indicators e.g. reported well-being; community involvement; workforce participation rates.

There is a significant time lag between action and the impact becoming visible. This is exacerbated by the lengthy periods between data collection at the population level e.g. four years for census data, longitudinal studies or occasional point in time studies by research organisations such as the Australian Institute of Health and Welfare. It is too early for the impacts of this Strategy to become visible in the regularly collected statistics about older people which would show trends over time and indicate whether the Strategy was having an impact at this scale.

This section is intended as a baseline for future comparison. Originally, the intention was for the 'Population Ageing Report Card' to collate this data for NSW and to provide a baseline for future years, however this has not been produced. This section covers a smaller range of data that is relevant specifically to the actions in the Ageing Strategy.

### 5.2. Well-being

We surveyed the well-being of 800 people (aged 50-64 and 65+) for this evaluation as part of the overall community survey (Section 1.2.6). One part of the questionnaire replicated questions that are asked as part of the national Personal Well-being Index<sup>5</sup> survey (PWI). This allowed for comparison of the survey data with the PWI normative data.

Overall, the average rating of well-being was 77.1% (where 100% equals fully satisfied'). Older people aged 65+ reported a slightly higher well-being than people aged 50-64. This is consistent with the national data.

**Table 8: Well-being**

<b>Well-being</b>			
<b>How satisfied are you with ... (100% = fully satisfied)</b>			
<b>NSW survey</b>	<b>50-64 yrs</b>	<b>65+</b>	<b>Whole sample</b>
... your life as a whole	75%	78.9%	77.1%
<b>PWI national (2010)</b>	<b>56-65 yrs</b>	<b>65+</b>	<b>All</b>
... your life as a whole	75.59%	76.98%	75.65% (NSW all, 75.33%)

<sup>5</sup>International Well-being Group (2013). Personal Well-being Index: 5th Edition. Melbourne: Australian Centre on Quality of Life, Deakin University <http://www.acqol.com.au/iwbg/wellbeing-index/pwi-a-english.pdf>

The majority of older people are satisfied with their well-being at the moment. In response to seven other questions, survey respondents indicated average well-being figures in the range from 71.8% (future security) to 79% (standard of living). People aged 65+ gave consistently higher responses (between two and five percentage points higher) than people aged 50-65 except for 'feeling safe', where the ratings for both groups were approximately the same.

**Table 9: Well-being (supplementary questions)**

<b>Well-being (supplementary questions)</b>			
<b>How satisfied are you with ... (100% = fully satisfied)</b>	<b>50-65 yrs</b>	<b>65+</b>	<b>Whole sample</b>
... your standard of living	77.0%	80.8%	79.0%
... your personal relationships	77.1%	80.0%	78.6%
... how safe you feel	77.6%	77.4%	77.5%
... feeling a part of your community	72.1%	74.3%	73.3%
... what you are currently achieving in life	70.6%	75.2%	73.1%
... your future security	69.1%	74.1%	71.8%
... your health	70.3%	72.1%	71.3%

The survey data also showed a correlation for older people between well-being and home ownership, and well-being and household status (who they live with). People who own their own home report a higher degree of well-being than people who are still paying off their home with a further gap to people who are renting (Table 11). People who are living with a spouse or partner also report a higher degree of well-being than people who are living alone or with relatives or friend (although not as much of a difference as home ownership – Table 12). The clear message is that people living in rental accommodation or rent free report the lowest rates of well-being. Whilst the nature of people's living circumstances is outside Government influence, the Government plays a significant role in the rules and structures around housing. The influence of housing on well-being of older people reinforces that housing is a critical issue and this will increase as the proportion of older people in the population increases.

**Table 10: Well-being and home ownership**

<b>Well-being and home ownership</b>			
<b>How satisfied are you with ... (100% = fully satisfied)</b>	<b>Fully own home</b>	<b>Paying a mortgage</b>	<b>Renting or living rent free</b>
... your life as a whole	79.4%	75.6%	65.4%
... your standard of living	81.8%	74.6%	68.5%
... your health	73.1%	70.9%	60.7%
... what you are currently achieving in life	76%	70.8%	59%
... your personal relationships	80.8%	78.1%	67.7%
... how safe you feel	79.1%	76.2%	70.2%
... feeling a part of your community	74.4%	73.8%	64.9%
... your future security	75%	66.8%	59.2%

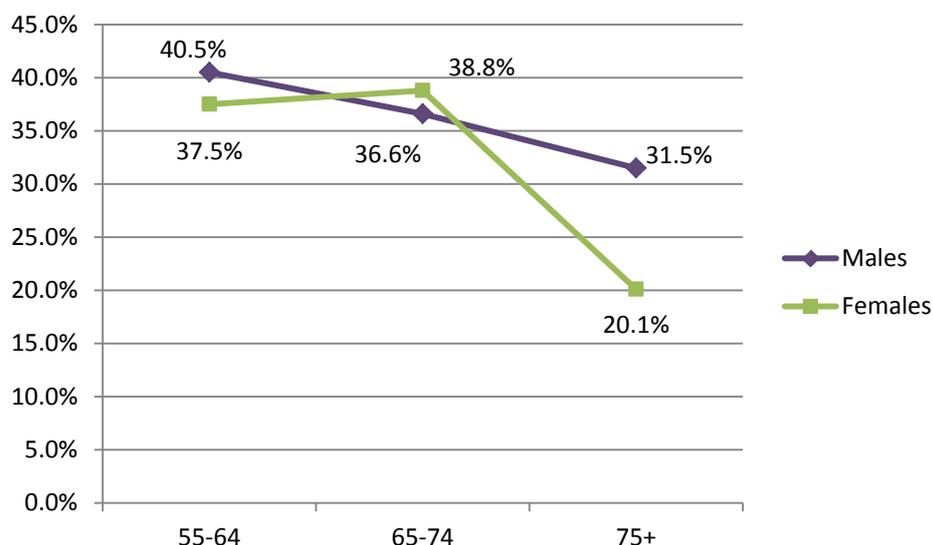
**Table 11: Well-being and household status**

Well-being and household status			
How satisfied are you with ... (100% = fully satisfied)	With your spouse/ partner	By yourself	With relative/ friend
... your life as a whole	79.5%	74.2%	70.7%
... your standard of living	80.8%	77.3%	74.4%
... your health	73.5%	68.6%	65.3%
... what you are currently achieving in life	75.1%	70.4%	67.9%
... your personal relationships	83.3%	70.8%	72.3%
... how safe you feel	78.7%	76.3%	77.2%
... feeling a part of your community	75.6%	69.1%	69.3%
... your future security	73.7%	69.2%	67.2%

### 5.3. Physical activity

The National Physical Activity Guidelines recommend at least 30 minutes of moderate intensity physical activity on most (preferably all) days. This has been converted into a measure of ‘sufficiently active for health’, being ‘150 minutes of physical activity over five or more sessions per week’. The ABS Australian Health Survey (2011-12) found that 43% of all adults met this goal. For older people, the figures were slightly lower (Figure 6). Although these are national figures, it is reasonable to assume that the NSW figures would be in line with these numbers.

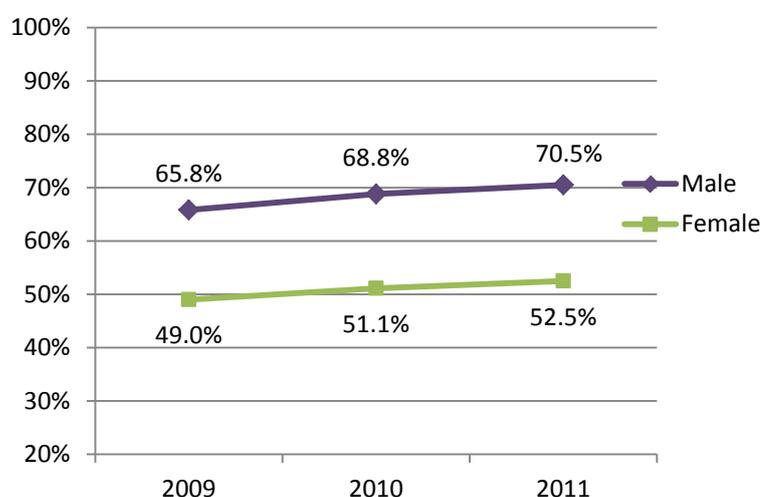
**Figure 6: Proportion of older adults meeting physical activity guidelines by age group**



## 5.4. Workforce participation

There has been a small but steady increase in workforce participation in NSW by people aged 55-64 from 2009 to 2011 (Figure 7). This is consistent with a range of demographic factors that have been widely discussed in other forums, including: longer life spans meaning that people both need to work longer to fund retirement plans, desire of older people to keep working because it is stimulating, challenging and brings social connections; and an ageing workforce consistent with an ageing population. The factors and policy initiatives impacting on these figures are complex and analysis of these is beyond the scope of this evaluation.

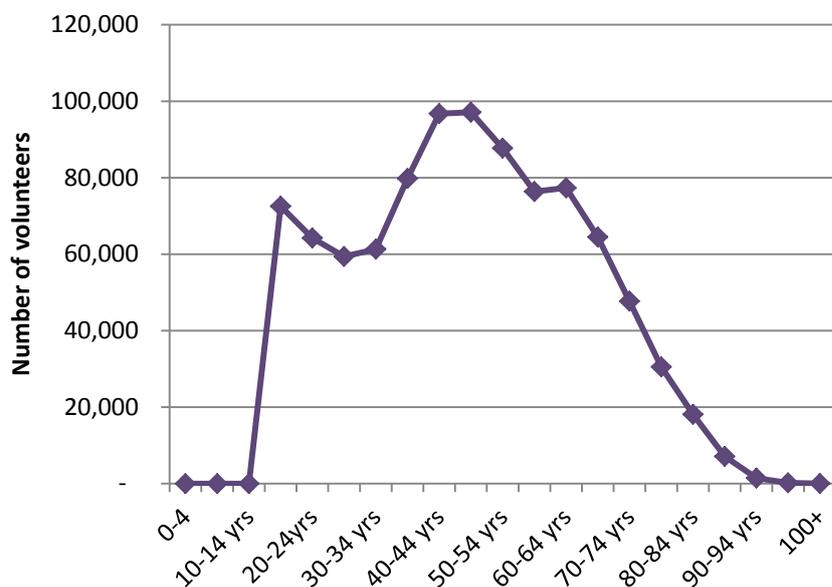
Figure 7: Workforce participation, 55-64 year olds in NSW (ABS Social Data)



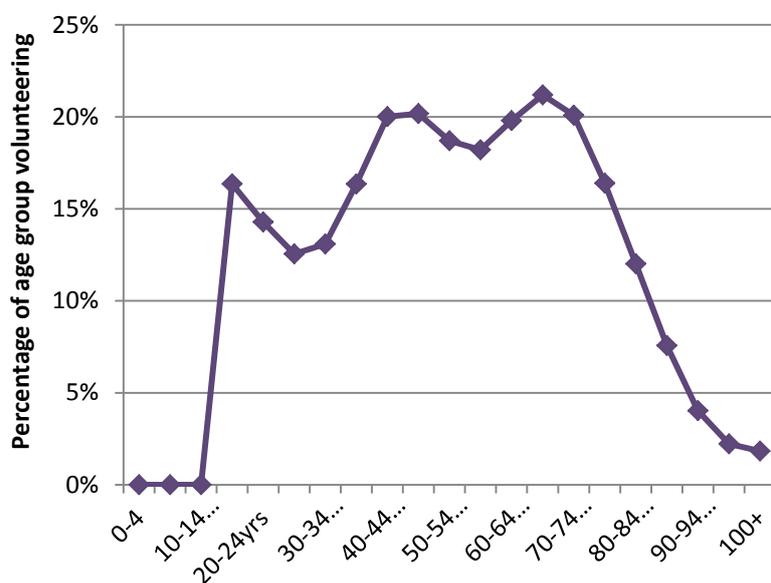
## 5.5. Volunteering

In 2011 (ABS Census), 942,084 people in NSW (14% of the population) indicated that they volunteered for a group or an organisation. Of all volunteers, the highest number came from the 40-49 year old age groups (97,110 volunteers were aged 40 – 49, Figure 8). For the age groups between 40 and 75, approximately 20% of all the people in each age group were volunteers (Figure 9). So while the numbers of people aged 60+ volunteering were less, the percentage of the population volunteering stayed similar until the age of 75+. In 2011, there were 1,019 people in NSW over 100 years old, and 20 of these people indicated that they had volunteered that year.

**Figure 8: Number of volunteers by 5 year age group (ABS Census, 2011)**



**Figure 9: % of age group volunteering (ABS Census, 2011)**



## 5.6. Travel

People drive less as they age and rely more on walking as their primary means of transport (Figure 10, NSW Household Travel Data, 2013). The Household Travel Data shows mode share by 10 year age group, and for older people in NSW (in bands 51-60, 61-70 and 70+) there has been a small increase in people driving over the last six years (Figures 11, 12 and 13).

Figure 10: Transport Mode Share

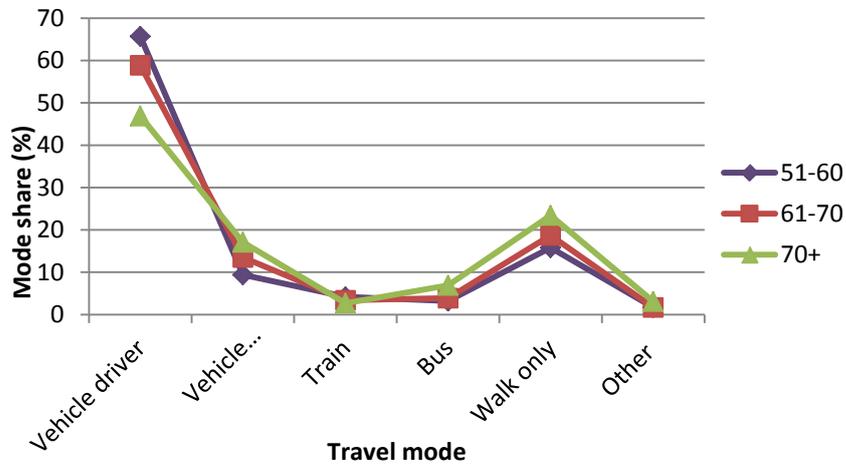


Figure 11: Mode share percentage, 51-60 year olds

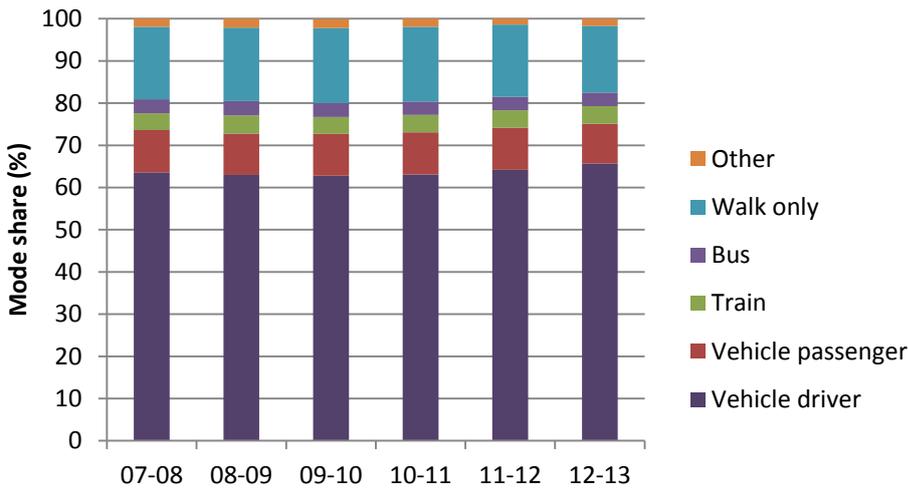


Figure 12: Mode share percentage, 61-70 year olds

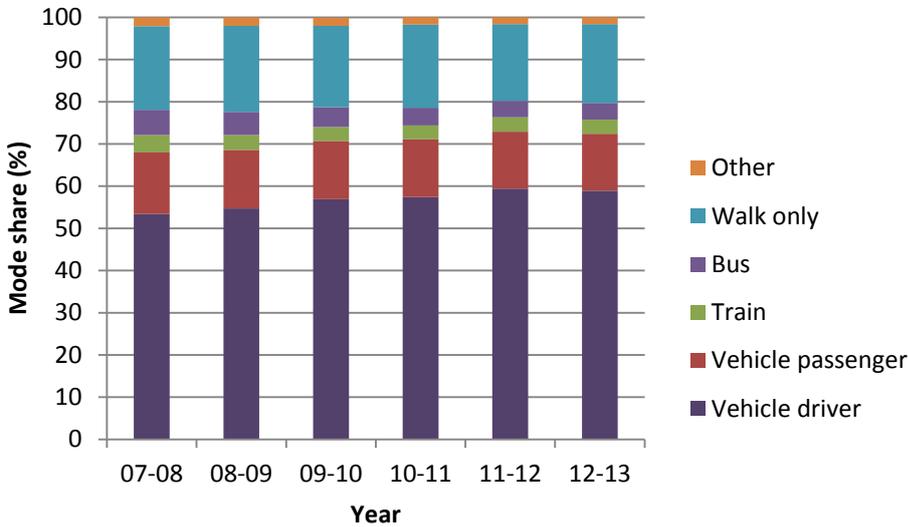
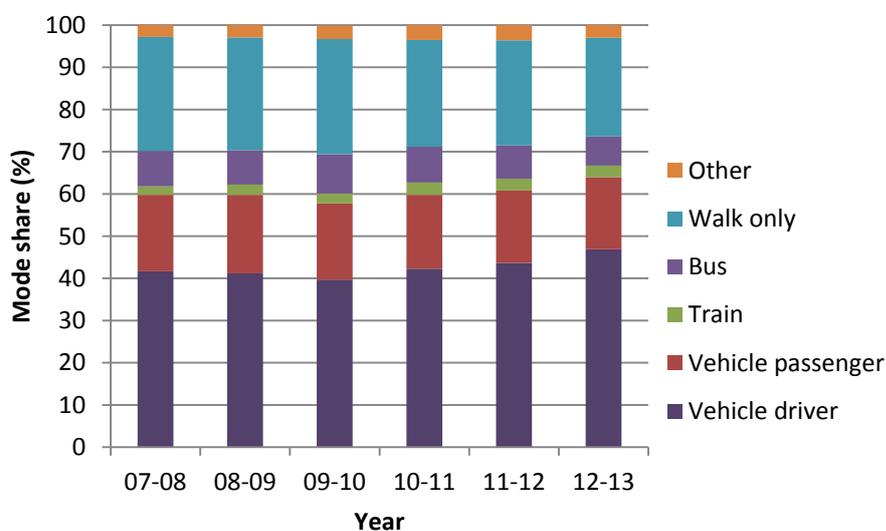


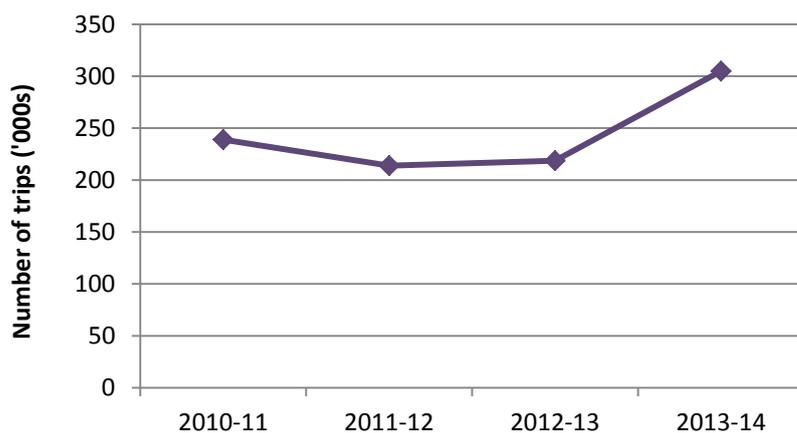
Figure 13: Mode share percentage, 70+



### 5.7. Community Transport and HACC

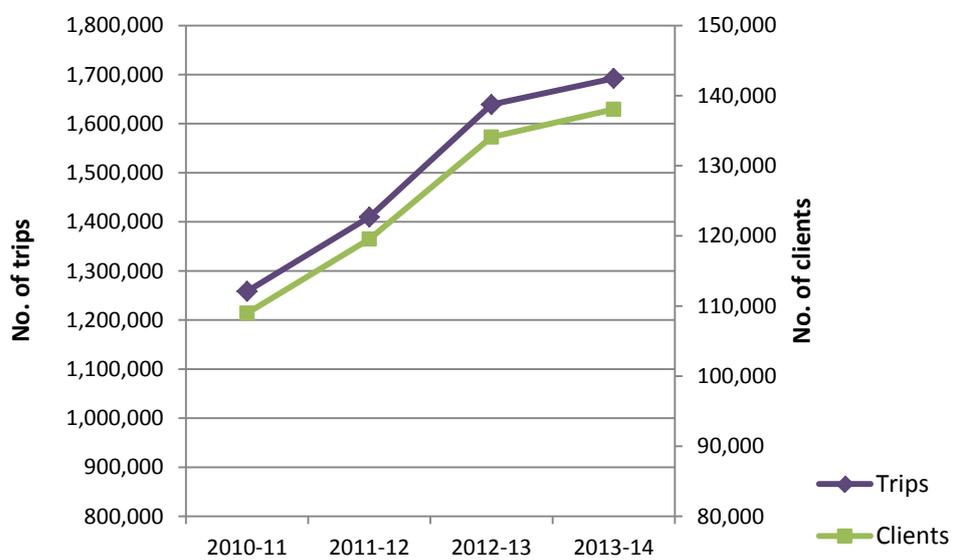
The total number of trips on community transport has increased from 238, 981 to 304,879 between 2010/11 and 2013/14, although there was a dip in usage in the intervening years (Figure 14). It is not known whether there was any change in funding or eligibility in this period. There is no data on the total number of clients or the number of trips per client, or on the ages of clients using community transport services.

Figure 14: Community transport - number of trips (NSW Household Travel Survey)



For transport supported by the Home and Community Care Program, the total number of trips has also increased in the same period but this is closely correlated with the number of clients. Thus, the total number of trips per client has remained broadly the same, increasing from 11.5 trips per client per year to 12.2 in 2013/14 (Figure 15). Eighty six percent of trips supported by HACC were for people aged over 60.

Figure 15: HACC transport in NSW, number of trips and clients (Transport for NSW)



## 6. Impacts on key groups

### 6.1. Individual behaviour change

One of the key evaluation questions asked: ‘What individual behaviour change occurred as a result of the Strategy?’ Actions to directly influence individual behaviour were implemented through the highlight projects. (The ‘Supporting Actions’ may also have an impact on individual behaviour change, but they fall beyond the scope of this evaluation as they are broadly actions that would have been undertaken by agencies without the Ageing Strategy.)

The highlight projects can be seen on a continuum from ‘Development’ to ‘Implementation’. Some of the projects were conceptually clear at the time of the release of the Strategy and so the focus of those projects is on their implementation. Some of the projects were at the ‘development’ end of the scale and focused on using leverage and influence to have an impact on existing and emerging policy processes. The ‘development’ projects were therefore not aiming to generate individual behaviour change and the effectiveness of these projects needs to be assessed against other criteria. However, it is a reasonable test for six of the highlight projects and their outcomes are summarised in Table 13. More detail about each of the projects is contained in the project summaries in Appendix B.

**Table 12: Individual behaviour change linked to highlight projects**

Highlight project	Behaviour change	Intended impact achieved
<b>Seniors</b>		
<b>Tackling abuse</b>	<p><b>Helpline</b></p> <ul style="list-style-type: none"> <li>100% of callers were ‘satisfied’ or ‘very satisfied’</li> <li>85% of callers had increased their ability to respond to abuse of an older person ‘a lot’</li> <li>44% of callers had increased their ability to identify elder abuse ‘a lot’ or ‘a little’</li> </ul> <p>(Note very small sample size – 28 respondents)</p> <p><b>Education program</b></p> <ul style="list-style-type: none"> <li>90% reported that the information was presented well</li> <li>88% reported that the information was relevant to their needs</li> <li>88% were satisfied or very satisfied with the presentation/facilitation of the session</li> <li>84% indicated that the information would assist them to review/improve their current work practices</li> </ul>	Yes
<b>Tech savvy seniors</b>	<p>Percentage of participants reporting that the training:</p> <ul style="list-style-type: none"> <li>Increased their confidence in using ICTs – 86%</li> <li>Helped them to use one specific ICT device – 88%</li> <li>Helped them to access information online – 77%</li> <li>Helped them to stay connected with family or close friends – 73%</li> <li>Helped to access services online – 50%</li> <li>Assisted in their involvement in community groups – 48%</li> </ul>	Yes
<b>Linking seniors to information</b>	<ul style="list-style-type: none"> <li>19,000 downloads of the new Seniors Card app</li> <li>36% increase in subscriptions to email newsletter</li> </ul>	Partially

Highlight project	Behaviour change	Intended impact achieved
Travelling safely	<ul style="list-style-type: none"> <li>Renewed commitment to the Older Drivers' Licensing Scheme (noting objections from one stakeholder group)</li> <li>852 new passenger trips between Young and Canberra or return</li> </ul>	Partially
<b>Middle years</b>		
My life, my decisions	<ul style="list-style-type: none"> <li>8% increase in people making a will (from 73% to 81%)</li> <li>6% increase in those considering making a will</li> <li>3% increase in knowledge of Power of Attorney</li> <li>3% increase in knowledge of Enduring Guardianship</li> </ul>	Yes
<b>Population ageing</b>		
Age-friendly local communities	<p>Of the 26 Councils that received a grant:</p> <ul style="list-style-type: none"> <li>50% indicated that their council was very likely or extremely likely to do more around ageing as a result of success in the grants scheme</li> <li>46% indicated that the project had raised the profile of ageing in Council 'a lot' or 'a little'</li> <li>42% made additional financial contributions to the project to supplement the funding from the program</li> <li>31% reported that they had undertaken additional actions or initiatives (e.g. one Council applied for recognition as an age-friendly community from the World Health Organisation)</li> </ul> <p>Seven Councils that were unsuccessful in their bid for a grant reported they had proceeded to implement some or all of the proposal that they submitted in the grant application.</p>	Yes

## 6.2. Factors impacting on behaviour change

For the four projects that achieved their intended impact (Tackling Abuse, Tech Savvy Seniors, My Life my decisions, Local Government Grants), the common factors behind their success in changing behaviour are the same factors that drove successful implementation:

- **A concrete commitment** – each of these commitments was clear and specific. There were clear goals and actions, and FACS staff and the other players understood their respective roles and what they were expected to be delivering.
- **Funding** – each of these projects had funding attached to it from FACS. There were four of the five commitments that had clear funding at the beginning of the Strategy (the fifth was the community transport projects under Travelling Safely). Two projects successfully attracted additional funding from the project partners. Funding makes it possible to deliver new programs or services and creates opportunities.
- **Willing partners** – in each case, the partners either led or made a significant contribution to the initiative. This reinforces the benefits of working with partners from the beginning of the project. Working with the partners meant that the collective team was able to achieve more than the individual agencies could, demonstrating that collaboration can be effective in the right context.

- **Strong stakeholder engagement** – for two of the projects (Tackling Abuse and Tech Savvy Seniors), the stakeholders were vocal and well-informed and were actively involved in the implementation of the projects.

There are also some specific learnings from each of the projects that contributed to the achievement of the outcomes:

#### *Tackling abuse*

- **Flexibility** - the service specification was very flexible to allow the delivery partner to develop the service approach in consultation with FACS. This has worked very well and has been a very productive relationship.
- **Branding** - the service has been branded as a NSW Government initiative and not as a Catholic Community Services initiative. Older people are generally more trusting of Government programs and this has been supported by other research. The branding may have helped with the profile of the service and the number of calls is still increasing as the service becomes more widely known. An updated website has yet to go live.
- **Steering Committee** - The partnership with the Steering Committee members has been effective in raising the profile of elder abuse and bringing about changes in some of the respective organisations. NSW Police now fund two equivalent full-time positions as 'Vulnerable Community Support Officers' to respond to referrals for welfare checks, which might arise from calls to the Helpline.

#### *Tech savvy seniors*

- **Identify the right issue** – one of the key factors in the success of the project was that the team had selected a key issue that was a concern for a large number of older people and where there was a clear, common goal (increase the digital literacy of older people). This was also a factor in attracting partnership funding and input from Telstra – there was significant alignment in goals and aspirations.
- **A good model** – the training program was designed to be low-key so that there were very few barriers to participation by the target audience. There was considerable flexibility in the implementation which allowed for local variation. There was also an element of using social connections to assist learning by making the training sessions social events. These were all factors that were important to the target group of older people.
- **Flexibility** – all the partners indicated that the flexibility of the approach and the willingness to adapt to changes was a critical factor in the project. This is particularly clear with the involvement of Telstra which was not contemplated at the beginning of the project yet brought substantial benefit and increased the reach and effectiveness of the project.
- **Corporate interest** – it was critical that Telstra's involvement was 'platform agnostic' and that it did not have a flavour of being a marketing exercise. Telstra brought additional resources and expertise to the project on terms that were consistent with the project overall.

### *My life, my decisions*

- **Clear and shared project aims** – the participants all understood the aims of the project and so were able to direct their collective effort to the delivery of the project.
- **Good project management** – the process of designing and delivering a mass market campaign was understood, including commissioning an agency to develop creative content, testing the content on focus groups ongoing monitoring to track whether the advertisements were reaching the target audience and evaluating the effectiveness of the campaign on its completion.

For the other projects, the factors that impacted on the project outcomes are:

- **Linking seniors to information** – this project did not have a specific goal of changing behaviour beyond improving access to information. The project has delivered some mechanical changes (downloads of an app; increase in email subscriptions) but these are only steps towards the higher goal of the Seniors Card being a ‘hub’ for a broad suite of information for seniors. The outcomes of the project to date have not delivered on this aspiration. This is a complex and dynamic area, where the scope of information that is available is rapidly increasing and the nature of the interests and needs of older people are both increasing and becoming more specialised. The project is heading in the right direction but remains challenged by the sophistication of the system that is required to meet these needs. Improved analytical and reporting capability would assist the Seniors Card team to know how its information sources are being used.
- **Travelling safely** – the specific actions in the highlight project are process related, for example, the review of the Older Drivers’ Licensing Scheme and so were not intended to change behaviour.

This highlight project was included as a ‘hook’ to maintain a focus on transport and ageing. TfNSW was already rolling out a significant investment in kneeling/low floor buses (nearly 80% of buses now comply) and building lifts at stations (close to half all stations). Further action on the broader goal of increasing the mobility of older people has not progressed so there is no additional outcome to report at this level. There are processes in place in Transport for NSW to develop a program but these will take some time to come to fruition.

As part of the development of the Travelling Safely project, FACS worked with Transport for NSW to find a way of raising the profile of ageing and the transport needs of older people within the agency. FACS provided \$613,000 funding to the Community Transport section of Transport for NSW for 6 key projects. The six projects were in regional NSW and were mostly focused on research around local knowledge and attitudes to transport, with some elements of travel training. One project funded a new service from Young to Canberra. These projects were mixed in their results.

### 6.3. Survey results re behaviour change

The evaluation included a survey of 800 people in NSW in two groups - 50-65 years old and 65+ (see Section 1.2.6 for the survey details). The survey included questions about recent behaviour changes across a range of domains. For people 65+, the survey asked questions about: using technology; getting out in the community; and using public transport (Table 14). For people aged 50-65, the questions covered: confidence in their ability to choose their work in the future; preparedness for ageing with wills and similar documents; and preparedness for ageing in relation to financial planning (Table 15). Whilst it is not possible to draw a direct causal link between the Ageing Strategy and these results, in two of the three domains for each age group, it is reasonable to infer that the Ageing Strategy initiatives had some impact and contributed to the overall change reported.

For people aged 65+:

- **New technology** – 20.3% of older people reported that their ability with using new technology had increased over the last two years, although their current ability on a scale of 0 (know nothing) to 10 (expert) was an average of 4.6. This indicates that older people are making more use of technology than previously but are conscious of how much they don't know. It is possible that the Tech Savvy Seniors project made some contribution to this change.
- **Use of public transport** – current use is an average of 2.64 (0 = never use; 10 = regularly use). Whilst 7% of people have increased their usage over the last two years, 8.4% have decreased their usage, which is a net decline overall (mostly in people over 80 years old).

For people aged 50-65:

- **Completing legal documents** – 20.4% indicated that they had increased their completion of documents over the last two years. The Get it in Black & White Campaign may have contributed to this increase.
- **Financial planning** – 24.3% indicated that they had increased their financial preparedness for ageing over the last two years. As this is the age-group that is close to retiring, financial planning should be a critical issue. The average score of preparedness was 7.25/10 (0 = not at all prepared; 10 = all sorted).

**Table 13: Knowledge, experience or activity level, 65+**

Knowledge, experience or activity level (65+)				
	Now (average)	Over the last two years		
		Increased	The same	Decreased
Level of ability using newer technology such as smart phones, tablets and computers (0 = know nothing; 10 = expert)	4.6/10	20.3%	74.3%	5.4%
The extent to which you get out and connect in the community (0 = stay at home; 10 = get out a lot)	7.1/10	9.8%	77.3%	12.9%
Frequency of use of public transport (0 = never use; 10 = regularly use)	2.64/10	7%	84.6%	8.4%

**Table 14: Knowledge, experience or activity level (50 - 65)**

<b>Knowledge, experience or activity level (50 - 65)</b>				
	<b>Now (average)</b>	<b>Over the last two years</b>		
		<b>Increased</b>	<b>The same</b>	<b>Decreased</b>
Your confidence that your current level of qualifications and training gives you the ability to choose where and how long you will work for in the future (0 = not at all confident; 10 = highly confident)	6.46/10	15.1%	67.2%	17.1%
Your preparedness for ageing with having completed critical legal documents such as wills, powers of attorney, enduring guardianship (0 = not prepared at all; 10 = all sorted)	7.02/10	20.4%	76.1%	3.5%
Your preparedness for ageing with financial planning such as super, investments, owning your own home or having somewhere to live going forward (0 = not prepared at all; 10 = all sorted)	7.25/10	24.3%	67.5%	8.1%

## **6.4. Conclusion**

The changes in behaviour that can be directly attributed to the Ageing Strategy to date are positive but modest.

Unsurprisingly, the strongest results have been achieved by initiatives that were clearly defined, were specifically funded, involved willing partners and where stakeholders were actively engaged.

Some initiatives were developmental in nature. It is reasonable that those projects have not resulted in behavioural change: for some, because the time from development to implementation is longer than the time that has elapsed so far; for others because the development process has not been effective (discussed further in Chapter 8).

## 7. Awareness

One basic test of the Ageing Strategy was the extent of awareness of the Strategy and of the specific highlight projects. The community survey (Section 1.2.6) included questions of the target groups related to their awareness of the ageing strategy and specific projects. This section presents the results of the awareness questions.

### 7.1. *Promotion of the Strategy and projects*

The Strategy was foreshadowed by an election commitment before the last election, so a proportion of older people would have expected to see a release from the Government. The preparatory work (Roundtable, public consultation sessions, consultations with the NGO sector) also raised some awareness of a forthcoming commitment.

The Ageing Strategy was announced by the Minister for Ageing while visiting a computer class for seniors at the City East Community College in Bondi Junction on 9 July 2012 and received modest press coverage. The Strategy was available on the FACS website and was linked to a number of related pages. The progress report was also released publicly by placing the document on the website in mid-2014.<sup>6</sup>

Some of the individual projects involved more targeted and specific promotion:

- **Tech Savvy Seniors** – launch by the Minister for Ageing at Parliament House plus active promotion in relevant media (e.g. local newspapers); promotion by community colleges and libraries of available courses and resultant word of mouth promotion by participants; Seniors Hub at the Easter Show
- **Elder Abuse** – media announcement by the Minister on the launch of the NSW Elder Abuse Helpline, plus promotion of a visit by the Minister to the Helpline office at the time of the 1,000<sup>th</sup> call (14<sup>th</sup> February 2014)
- **Get it in Black & White** – a mass market campaign with a broad penetration into the target market
- **Living active lives** – Seniors Hub at the Royal Easter show; some local one-off promotional events (e.g. North Coast Seniors Expo); local promotion of activities at Sport & Recreation venues during Seniors Week
- **Age friendly local government grants** – the grants program was widely advertised through the LGNSW weekly bulletin, promotion on the LGNSW website, emails to networks and letters sent directly to councils with details of the grants process. Local Government NSW also organised a one-day workshop on positive ageing, including promotion of the grants program (This was held 12<sup>th</sup> October 2012 and representatives from 56 Councils attended.

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<sup>6</sup> [http://www.ageing.nsw.gov.au/data/assets/pdf\\_file/0013/301216/FINAL-AND-APPROVED-Progress-report.pdf](http://www.ageing.nsw.gov.au/data/assets/pdf_file/0013/301216/FINAL-AND-APPROVED-Progress-report.pdf)

- **Seniors Card** – ongoing promotion of the Seniors Card and continuous upgrading of the website.

## 7.2. Strategy overall

In the survey conducted for this evaluation, when prompted by the statement: “the NSW Ageing Strategy is designed to help seniors and adults in their middle years live healthy, active, and socially connected lives” 14.4% of respondents indicated that they either ‘know a fair bit’ or ‘know a little’ about the Strategy. (Respondents were asked whether they ‘know a fair bit’, ‘know a little’, ‘have heard about it but know nothing’ or ‘have never heard about it’). The awareness was slightly higher for people over 65 and higher for women than men. One NGO stakeholder in comments on the preliminary findings has indicated that these figures are higher than they expected.

**Table 15: Awareness of the Ageing Strategy**

Awareness of the Ageing Strategy			
Age group	‘Know a fair bit’	‘Know a little’	Total ‘know about it’
50 – 65	3.0%	7.8%	10.8%
65+	3.5%	14.0%	17.5%
Whole sample	3.3%	11.1%	14.4%

## 7.3. Awareness of highlight projects

Awareness of specific highlight projects targeting people 65+ was at a level similar to the overall awareness of the Strategy (around 14%), except for Tech Savvy Seniors which was slightly lower at 11.2% (Table 17).

**Table 16: Seniors - awareness of highlight projects**

Seniors (65+) – awareness of highlight projects			
Topic	‘Know a fair bit’	‘Know a little’	Total ‘know about it’
Local government grants	3.0%	11.7%	14.7%
Elder abuse	3.3%	11.0%	14.3%
Encourage seniors to use public transport more often	6.8%	7.2%	14.0%
Tech savvy seniors	4.0%	7.2%	11.2%

For people in their middle years, the levels of awareness of the highlight projects were slightly lower than overall awareness of the Strategy, ranging from 8.6% to 13.4% (Table 18).

Some specific comments:

- **Subsidised work training** – it is possible that this awareness figure was inflated by some people identifying a Commonwealth Government program to provide subsidies for small businesses to employ older people.

- **Get it in Black & White** – the slightly lower awareness figure may be a result of the time interval between when the campaign was delivered and the time of the survey. This survey was administered in late September 2014, and the campaign finished in February 2014 (7 months earlier). Notwithstanding this, the trend towards higher awareness amongst older people was sustained. In this case, it was reflected in the older bracket of the 50-65 age group (i.e. 60-64 year olds).

**Table 17: Middle years - awareness of highlight projects**

<b>Middle years (50-65) – awareness of highlight projects</b>			
<b>Topic</b>	<b>‘Know a fair bit’</b>	<b>‘Know a little’</b>	<b>Total ‘know about it’</b>
Subsidised work training	1.3%	12.1%	13.4%
Planning ahead	2.2%	7.0%	9.1%
Completing wills and other documents, including ‘Get it in Black & White’	2.4%	6.2%	8.6%

#### **7.4. Discussion**

The promotional activities for the Strategy itself were consistent with approaches taken for other Government announcements. In contrast, Tech Savvy Seniors has involved more promotion than a Government program would typically undertake, partly because of the involvement of a corporate partner. Similarly, the mass media campaign for *Get it in Black & White* was based on established methods for running similar community campaigns. Each project has undertaken promotional activities that are relevant to the nature of the project.

Before they can participate in a targeted activity, people need to be aware of it, so the broadest possible awareness is desirable. However, this needs to be balanced against the risk of creating too much demand for a service or program, leading to the activity being over-subscribed and the participants having a poorer quality experience.

#### **7.5. Conclusion**

The Ageing Strategy has achieved a reasonable penetration in terms of the awareness of the target audience and the extent of promotional activity that was undertaken. However, in the absence of available benchmarks for similar strategies it is unclear whether this degree of awareness is high or low (and partly these figures are included here to provide a benchmark for future strategies and Government announcements). As indicated above, one NGO stakeholder expressed a view that these figures were higher than they expected. Additionally, some confusion for some respondents between Commonwealth and State initiatives for specific projects suggests a need for caution in interpreting the overall awareness results.

## 8. Implementation

This section explores the effectiveness of the implementation of the highlight projects. More detail about each individual project is included in the Project Summaries in Appendix B.

### 8.1. Summary

Of the twelve highlight projects, in terms of the effectiveness of their implementation:

- four are rated as high
- four are rated as moderate
- four are rated as low (Table 19).

The criteria for the ratings are:

- the extent to which the commitments in the Strategy were delivered
- the extent to which the project delivered clear outputs
- the extent to which the project has been influential - for those projects that were ‘hooks’ that aimed to influence other agencies or decision-making processes.

**Table 18: Implementation of highlight projects and outputs**

Highlight project	Rating	Outputs
<b>Seniors</b>		
<b>Tackling abuse</b>	High	<ul style="list-style-type: none"> <li>▪ NSW Elder Abuse Helpline established</li> <li>▪ Education/awareness sessions delivered</li> </ul>
<b>Tech savvy seniors</b>	High	<ul style="list-style-type: none"> <li>▪ 17,000 training spots</li> <li>▪ 11,000 unique attendees</li> <li>▪ Good state-wide coverage</li> </ul>
<b>Linking seniors to information</b>	Med	<ul style="list-style-type: none"> <li>▪ New Seniors Card app developed</li> <li>▪ Marketing and promotion of the Seniors Card and monthly newsletters</li> <li>▪ Developing vision for next stages</li> </ul>
<b>Living active lives</b>	Low	<ul style="list-style-type: none"> <li>▪ Seniors Hub at the Royal Easter Show</li> <li>▪ North Coast Seniors Expo</li> <li>▪ Creative Ageing grants</li> <li>▪ Sponsorship of Creative Ageing and Health conference</li> <li>▪ Revamped Steering Committee</li> </ul>
<b>Travelling safely</b>	Med	<ul style="list-style-type: none"> <li>▪ Review of older driver requirements complete (note: some stakeholders unsatisfied with outcome of the review)</li> <li>▪ Position funded in Transport to review older people’s transport needs and patterns</li> <li>▪ Partial implementation of Community Transport projects</li> </ul>
<b>Middle years</b>		
<b>Work skills, workplace value</b>	Med	<ul style="list-style-type: none"> <li>▪ GAP Taskforce convened</li> <li>▪ Project on managing injuries and work scoped</li> <li>▪ IDC sub-committee convened</li> </ul>

<b>My life, my decisions</b>	High	<ul style="list-style-type: none"> <li>Public awareness campaign, 'Get it in Black &amp; White'</li> <li>Revamped website and information tools</li> </ul>
<b>Securing your future</b>	Low	<ul style="list-style-type: none"> <li>Literature review completed</li> <li>Creative proposal developed</li> </ul>
<b>Population ageing</b>		
<b>Public-private partnerships for population ageing</b>	Low	<ul style="list-style-type: none"> <li>1 day forum at Parliament House</li> <li>Telstra partnership in Tech Savvy Seniors</li> <li>GAP Taskforce for Work Skills</li> <li>Joint publication with the Urban Taskforce on Seniors Housing (one off)</li> </ul>
<b>Age-friendly local communities</b>	High	<ul style="list-style-type: none"> <li>26 grants covering: ageing strategies (10); access (9); recreation (6); and pedestrian access and mobility plan (1)</li> </ul>
<b>Housing choices</b>	Low	<ul style="list-style-type: none"> <li>Input into policy discussions</li> <li>Raised stakeholder awareness, particularly property developers</li> </ul>
<b>Population ageing in the NSW Government</b>	Med	<ul style="list-style-type: none"> <li>Age-related expenditure report</li> <li>Identified data points and sources</li> <li>Template for ageing report</li> </ul>

## 8.2. Factors in implementation

### 8.2.1. High effectiveness

The four projects that are rated as 'high' in the implementation are: Tackling Abuse; Tech Savvy Seniors; My life, My decisions (Get it in Black & White); and Age-friendly Local Communities. The basis for the 'high' rating is:

- There have been clear and demonstrable outputs
- The projects have delivered on the commitments in the Ageing Strategy

Whilst each project is different, there are some common elements that have contributed to their effectiveness:

- A concrete commitment** – each of these commitments was clear and specific. There was a clear goal and action articulated, and FACS staff and the other players understood their respective roles and what they were expected to be delivering.
- Funding** – each of these also had funding attached to it from FACS. There were four of the five commitments that had clear funding at the beginning of the Strategy (the fifth was the community transport projects under Travelling Safely). Two projects successfully attracted additional funding from the project partners. Funding makes it possible to deliver new programs or services and creates opportunities.

- **Willing partners** – in each case, the partners either led or made a significant contribution to the initiative. This reinforces the benefits of working with partners from the beginning of the project. Working with the partners meant that the collective team was able to achieve more than the individual agencies could, demonstrating that collaboration can be effective in the right context.
- **Strong stakeholder engagement** – for two of the projects (Tackling Abuse and Tech Savvy Seniors), the stakeholders were vocal and well-informed and were actively involved in the implementation of the projects.

### 8.2.2. Moderate effectiveness

Four of the projects were rated as ‘moderate’ in the effectiveness of their implementation: Linking seniors to information; Travelling Safely; Work skills, Workplace value; Population Ageing in the NSW Government. The basis for these ratings is:

- Some of the commitments in the Strategy were delivered
- There are some specific outputs from the project
- Some higher level goals and actions were not addressed by the project.

The factors influencing the implementation of these projects were:

- **Developmental stage** – just as for the projects that were rated ‘low’, some of commitments in the Strategy for these moderately rated projects were ‘hooks’ for further work e.g. Work Skills. For the Work Skills initiative, the complex and contested policy environment created difficulties for the FACS project team with determining how to shape the project and identify a clear role for the State Government. Ultimately, this was partly solved by focusing on a more narrow area of activity with the support of external partners. For Travelling Safely, an alternative approach has emerged with FACS funding a position in Transport for NSW to raise awareness of ageing from within the agency.
- **Modest goals** – whilst these projects achieved goals, those goals were relatively modest and based on business-as-usual activities (Linking seniors to information; Travelling Safely). The attempts to drive greater leverage from these projects were less successful e.g. demonstrating influence on the transport portfolio by raising awareness of ageing and the needs of older people
- **Involvement of partners** – again the presence or absence of partners had a direct impact on the success of the project. Treasury’s involvement in the Population Ageing project in commissioning the report on age related expenditure in the NSW Government report was extremely valuable. For Linking Seniors to Information, the relationship with the Department of Finance and Services facilitated the development of the Seniors Card app. However the redesign of the website has slowed and would benefit from some external input and support. The GAP Taskforce has assisted in progressing the shaping of issues and driving towards an outcome for the Work Skills project.

- **Champions** – there are no champions for these projects to energise the project teams or create opportunities in new ways. The presence of champions for these projects may have increased the effectiveness of the implementation.

### 8.2.3. Low effectiveness

Four projects were rated as low in the effectiveness of their implementation: Living Active Lives; Securing Your Future; Public-Private Partnerships and Housing Choices. The basis for the ‘low’ rating is:

- limited outputs from the project
- actions that were unfocused or fragmented, with limited connection to an overall outcome
- the projects did not deliver on the commitments in the Strategy.

There are different reasons for these results from these four projects. The primary common reason is that these four projects were undeveloped at the time of the Strategy. As discussed earlier, the full suite of projects was a mix of immediate actions and ‘hooks’, and several of these projects fall into the ‘hook’ category. They are also ambitious in what they are trying to tackle: large, complex problems which Governments have struggled with for some time (e.g. how to get the general population to be more active).

There is a risk of concluding that these projects were not worth doing because there are few tangible outputs. However, particularly for those projects that are trying to exert influence on other agencies (e.g. Housing Choices), that may be a simplistic conclusion. It is difficult to separate the issue of whether it was not implemented well from whether the approach to tackling the issue in the first place was at fault (i.e. ‘was it the wrong thing to do?’).

The common elements about these projects were:

- **Undeveloped concepts** – the ideas or concepts behind the initiatives were not well-developed at the time they were announced.
- **Limited engagement by potential partners** – FACS ended up being the lead for areas where they did not have responsibility (health, housing). Without strong partners, FACS was not able to generate the leverage that would drive change.
- **Developmental stage** – each of these projects was developmental, with the aim that making it part of the Ageing Strategy would use some of the ‘vertical’ authority to engage partners and generate momentum. FACS was not able to capitalise on this. In some cases this was because the context was not favourable (e.g. planning reforms and their impact on housing).
- **Broad focus** – these projects were very broad (e.g. improve housing choices) compared to the projects that were more successful in their implementation. A smaller, clearer target will always be easier to achieve but at the cost of limiting the ambition of a program. It is important for strategies to be both aspirational and to balance that aspiration with the pragmatism of what can reasonably be achieved in the context of the time available.
- **Limited additional funding** – by contrast with the projects rated as ‘high’, these initiatives had very limited amounts of additional funding so needed to be funded from within existing

resources. This meant that a compelling argument needed to be made to redirect resources from existing commitments and it is possible that the argument was not sufficiently compelling.

### **8.3. Conclusion**

In summary, a project with a clear change mechanism is likely to be more successful, but the scale and complexity for some of these issues meant it was not possible to have a clear change mechanism designed as part of the Strategy. As noted by Keast (op cit), it is reasonable for 'whole of government' actions to be incomplete when they commence (and may in fact be a necessary requirement for some which are complex and interconnected) so that a solution can be emergent rather than directed. It is therefore important when selecting activities or projects to include a mix of approaches – some that have tangible change mechanisms and some that aim to develop new approaches or exploit emerging opportunities.

## 9. Expenditure

### 9.1. FACS expenditure

The results reported in this evaluation relate to \$6.375m worth of expenditure from July 2012 to December 2014. FACS's actual expenditure on these line items was \$7.995m in that period. The difference is project expenditure for forward years or for projects that have not yet been able to report (see notes).

**Table 19 - FACS expenditure, July 12 to December 14**

Highlight project	FACS expenditure linked to the reported results (July 12 to December 14)
Tackling abuse	\$1,396,760
Tech savvy seniors	\$500,000
Linking seniors to information	\$350,000
Living active lives	\$1,055,880 <sup>2</sup>
Travelling safely	\$971,000
Work skills, workplace value	\$56,400
My life, my decisions	\$598,182
Securing your future	\$243,100
Public-private partnerships	-
Age-friendly local communities	\$749,151
Housing choices	\$5,000
Population ageing in the NSW Government	\$249,284
<b>Total</b>	<b>\$6,375,320</b>

#### Notes:

1. Tech savvy seniors - \$500,000 is for programs that were rolled out in 2014 and results are not yet available so not recorded in this report.
2. Living active lives - \$1,000,000 was provided for Grandparents Day over 4 years, which was committed before the Ageing Strategy was developed. \$817,000 was expended from 2011/12 to 2013/14.
3. My life, my decisions - \$500,000 is for a campaign that will be rolled out in 2015, so results are not available and not recorded in this report.

## 9.2. Investment by partners

For three projects, the partner organisations contributed a total of \$1.03m. The Trustee and Guardian has also committed funding for an additional public education campaign in 2015.

**Table 20 - Expenditure by partner organisations**

Highlight project	Partner	\$
<i>Tech savvy seniors</i>	Telstra	\$240,000
<i>My life, my decisions</i>	Trustee and Guardian	\$500,000 (Phase 1)
<i>Population ageing in the NSW Government</i>	Treasury	\$299,448
<b>Total</b>		\$1,039,448

Partners also provided in-kind support by dedicating staffing resources to specific project. The partners involved were:

**Table 21: In kind support**

Highlight project	
Tech savvy seniors	Department of Education & Communities – Project Officer to manage roll out; membership of Steering Committee Telstra – support for marketing (e.g. provide tech experts at the Seniors Hub at the Easter Show)
Linking seniors to information	Department of Finance and Services – facilitation of process for Seniors Card app
Living active lives	Sport & Recreation – roll out of ‘Give it a go’
Travelling safely	Transport for NSW– oversight of community transport projects; oversight of funded position on older persons’ mobility; work on accessible transport and the surrounding pedestrian area, older people’s safety as drivers, pedestrians and in using public transport, the development of a state wide travel training program, reform to community transport sector, the development a Sydney Walking Strategy, work with local councils to develop local pedestrian and mobility plans and work on ageing population issues in the Regional Transport Plans.
Work skills, workplace value	Global Access Partners (GAP) – secretariat for Taskforce; input and attendance at Taskforce meetings
My life, my decisions	NSW Trustee & Guardian – management of roll out; membership of Steering Committee
Age-friendly local communities	Local Government NSW – ½ x 1 Senior Program Officer
Population ageing in the NSW Government	NSW Treasury – oversight of age-related expenditure report

Each of the Working Groups and Steering Committees also involved members from a range of agencies and non-government organisations, which was a significant commitment of time and resources.

## 10. The ‘Influencer’ model

This section tests the ‘Influencer’ model as a method of assessing the effectiveness of change mechanisms using housing and transport as subject areas for the test. These are working examples only and do not represent a commitment by the NSW Government to any of these actions.

### 10.1. About the model

The ‘Influencer’ model (*Influencer*; Patterson, Grenny, Maxfield, McMillan and Switzler; McGraw Hill; New York, 2008) uses a six-source matrix as a benchmark for assessing the effectiveness of any Strategy or proposed change. There are six frames of potential influence (Table 22). The columns are ‘motivation’ (intrinsic desire to do the particular thing) and ‘ability’ (skills and knowledge to be able to make the change). These are then worked through at three scales – personal, social and structural.

According to the model, to be most successful, a Strategy will need to be effective in at least four of these six domains. To use the model, a particular desired behaviour is tested through these six frames to see if there is something in place that will encourage, support or facilitate that particular behaviour.

**Table 22: The Six Sources of Influence**

	Motivation	Ability
Personal	1. Help them love what they hate	2. Help them do what they can’t
Social	3. Provide encouragement	4. Provide assistance
Structural	5. Change the economy	6. Change their environment

### 10.2. Housing

The Housing Choices project in the Ageing Strategy did not target a specific behaviour to change, but was seeking to exert some structural influence on the housing system. However, a common theme in discussions with stakeholders was downsizing and the need to find ways to help older people move from larger, underutilised dwellings to smaller, more appropriate housing. The benefits of this are that older people move to housing that is better suited to their needs and stock of larger buildings is freed up for other users (e.g. young families).

For the purpose of this exercise, the target behaviour is framed as ‘Older people move to sustainable housing and free up their capital and the housing stock’. With this behaviour in mind, Table 23 outlines what might be needed to make it possible for older people to downsize.

**Table 23: Attributes that would support downsizing**

	Motivation	Ability
<b>Personal</b>	<ul style="list-style-type: none"> <li>▪ Get access to capital</li> <li>▪ Not lose money (e.g. stamp duty and transaction costs)</li> <li>▪ Value stability, security and connections</li> <li>▪ Value a 'liveable community'</li> </ul>	<ul style="list-style-type: none"> <li>▪ Able to negotiate system</li> <li>▪ Able to manage the costs to 'me' – both financial and emotional</li> </ul>
<b>Social</b>	<ul style="list-style-type: none"> <li>▪ Peers doing it</li> </ul>	<ul style="list-style-type: none"> <li>▪ Credible advisors available to help negotiate the system</li> <li>▪ Good information available to consumers</li> </ul>
<b>Structural</b>	<ul style="list-style-type: none"> <li>▪ Financial incentives (e.g. discount on stamp duty)</li> <li>▪ Development incentives (e.g. floor space ratio bonuses for universal design)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Alternate stock available</li> <li>▪ Planning rules that promote appropriate development</li> <li>▪ Good information</li> </ul>

Table 24 shows what is currently in place of these possible

**Table 24: Assessment of current actions to support downsizing**

	Motivation	Ability
<b>Personal</b>	<ul style="list-style-type: none"> <li>▪ Stamp duty discount for purchase of new dwellings</li> <li>▪ No guarantee that new housing is substantially cheaper than existing housing (no freeing up of capital)</li> <li>▪ Alternative housing not available in many communities</li> </ul>	<ul style="list-style-type: none"> <li>▪ Lots of uncertainty</li> </ul>
<b>Social</b>	<ul style="list-style-type: none"> <li>▪ A small number of people are doing this where there are options available</li> </ul>	<ul style="list-style-type: none"> <li>▪ Poor information and no widely recognised source of information</li> </ul>
<b>Structural</b>	<ul style="list-style-type: none"> <li>▪ Stamp duty discount in some cases</li> <li>▪ Some development incentives (CW &amp; State), although these keep changing</li> </ul>	<ul style="list-style-type: none"> <li>▪ Lack of stock</li> <li>▪ Uncertain planning rules</li> </ul>

This analysis would indicate that there is currently very little incentive for older people to downsize, although there are some actions in place that would support it. Options for addressing this might include:

- promote liveable communities and benefits of maintaining social connections in later life (personal motivation)
- online training modules for older people about the process of downsizing (personal ability)
- promote case studies of successful downsizing (social motivation)
- develop clear information on downsizing pathways and training modules for financial planners on managing downsizing (social ability)
- clearer development incentives; broader application of stamp duty discounts; tax incentives (structural motivation).

### 10.3. Travel

This second worked example is around travel. One of the key issues around travel is helping older people use public transport, particularly as they get to a point in their lives where they stop driving. For this exercise, the target behaviour could be simply for older people to use public transport. Table 25 outlines the attributes in all six sectors that could support older people.

**Table 25: Attributes that would support older people using public transport**

	Motivation	Ability
<b>Personal</b>	<ul style="list-style-type: none"> <li>Want to get out and stay socially connected</li> <li>Accept that travelling by public transport takes 'longer'</li> <li>Feel safe</li> </ul>	<ul style="list-style-type: none"> <li>Know how to use the network e.g. Opal Cards</li> <li>Know routes and timetables and how to use transport apps</li> <li>Know how to recover if things go wrong (e.g. bus cancelled; catch wrong train)</li> </ul>
<b>Social</b>	<ul style="list-style-type: none"> <li>Peers doing it</li> <li>'Normal' for people to use public transport</li> </ul>	<ul style="list-style-type: none"> <li>Travel training e.g. Lane Cove Council course on 'how to use an Opal Card'</li> <li>Free information services e.g. 1300 number for older people</li> </ul>
<b>Structural</b>	<ul style="list-style-type: none"> <li>Subsidised or free transport</li> </ul>	<ul style="list-style-type: none"> <li>Seamless network (bus, rail, community transport)</li> <li>Apps/web sites/information user friendly for older people</li> <li>Clear wayfinding</li> <li>Clear and reliable timetabling</li> <li>Accessible services</li> <li>Transport to all major hubs (e.g. hospital)</li> </ul>

Table 26 shows an assessment of the current actions in NSW that encourage the use of public transport by older people.

**Table 26: Assessment of current actions to support older people using public transport**

	Motivation	Ability
<b>Personal</b>	<ul style="list-style-type: none"> <li>People generally motivated to travel</li> <li>Need to attend appointments</li> <li>Some hesitation around how long it takes and safety</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge likely to be mixed</li> <li>Sydney network sometimes difficult to negotiate (changing modes)</li> </ul>
<b>Social</b>	<ul style="list-style-type: none"> <li>Some older people using public transport</li> </ul>	<ul style="list-style-type: none"> <li>Information services available (may not be optimised for older people)</li> <li>Transport for NSW developing Travel Training approach – particularly targeting older people as they approach an age where they will stop driving</li> </ul>
<b>Structural</b>	<ul style="list-style-type: none"> <li>\$2.50 all day fares for pensioners and Seniors Card holders</li> </ul>	<ul style="list-style-type: none"> <li>Connections improving</li> <li>Wayfinding (direction signs at stations) currently being upgraded</li> </ul>

	Motivation	Ability
	<ul style="list-style-type: none"> <li>▪ Gold Opal card</li> </ul>	<ul style="list-style-type: none"> <li>▪ Access gradually improving – good for Sydney buses and further upgrades in low floor buses underway; lifts being installed at stations</li> <li>▪ Transport options outside Sydney are limited (some services in Newcastle and Wollongong) – A long term plan for regional rail is underway and Regional Transport Plans are being developed which include initiatives targeting older people</li> </ul>

Initiatives are in place that address all of the six ‘Influencer’ domains and TfNSW is currently undertaking research to support the development of an Older Persons Transport Plan.

Working through all six dimensions could identify other options, such as:

- Personal motivation - subsidised travel in Seniors Week – the behavioural insights work has indicated that trial periods can be effective in helping people learn new behaviours
- Personal ability - travel companions – ‘buddies’ to travel with older people to help them learn useful routes
- Social motivation - Promoting the use of public transport specifically by older people – another insight from behavioural insights is that it is powerful to change social norms. The purpose of this promotional activity would be to make using public transport a normal part of life
- Structural ability - all major activity hubs to have travel plans for older people including regular and frequent shuttle buses.

These options have not been tested with TfNSW and do not represent any proposed approach by the NSW Government – they are included here to represent the potential usefulness of the Influencer model in developing future strategies.

## 10.4. Conclusion

The *Influencer* model is a useful analytical tool for identifying why a change strategy may not be having the desired effect. The key steps in using the tool are:

- Identifying a target behaviour – for some of the Ageing Strategy projects, there was not a target behaviour as part of the design
- Identifying the attributes of an effective system for that behaviour – a preferred ‘end state’ and current barriers
- Identifying current actions in each of the six influencer domains and assessing the effectiveness of those actions
- Identifying options for further work and comparing costs and benefits of those approaches.

For the two worked examples, the using the model shows that:

- There is currently little incentive for older people to downsize– a small percentage of more wealthy older people will be in a financial position to do so, but there are multiple barriers to this being a solution to housing issues in the current context
- The transport system is broadly well placed to encourage older people to use public transport and current initiatives in Transport for NSW around older people and transport will support further progress.

For the projects that have not progressed beyond the development phase in the Ageing Strategy, one of the barriers has been failing to identify a target behaviour (i.e. what do you want people to do differently?). Once such a behaviour is identified, it would provide a focus for any activity. We suggest that this is taken into consideration when refreshing the Ageing Strategy (see Recommendation 1).

## 11. Other ageing related decisions and activity

There has been significant change in policy settings for ageing in the time of the Strategy. One of the most significant was the decision by the Commonwealth Government to stop paying rebates and concessions on council rates, utilities and transport for people receiving the aged pension, which was announced in the 2014/15 budget. The State Government chose to maintain the rebates for one year and to lobby the Commonwealth during that period. The State Government estimated that it would spend an extra \$107m in 2014/15 to cover those rebates.

The NSW Treasurer's Budget Speech provides no comment on the basis for this decision and it is not possible to identify whether the Ageing Strategy was one of the influencers. It is notable however that the Treasurer at the time of the announcement was Andrew Constance, former Minister for Ageing who was responsible for the release of the Ageing Strategy and was familiar with ageing issues.

The *Gold Opal Card* was introduced in September 2014. The Opal Card is an electronic card for use in the Greater Sydney Metropolitan Area on trains, buses and ferries. Pensioners and Seniors Card holders are eligible for subsidised transport in the Greater Sydney Metropolitan Area and pay \$2.50 for unlimited all day travel. The Gold Opal Card replicates the discounted travel so that older people do not need to rely on a paper ticket (although the paper tickets are still in use). This announcement was not a major policy shift but was a popular action. Stakeholder groups had been critical of the Opal Card because older people had been excluded from its use prior to the Gold Opal Card.

It is probable that the Ageing Strategy had no bearing on this issue as it was within the control of a single agency (Transport for NSW) and stakeholders engaged directly with the Department and the Minister (i.e. there was no 'whole of government' consideration involved).

Over the life of the Ageing Strategy, at least one stakeholder was concerned that there have been policy announcements in NSW which do not specifically articulate consideration or a position in relation to older people. Two of the more significant include:

- *Rural Health Plan* – the Rural Health Plan, released in November 2014, does not specifically address the needs of older people, although older people are a significant and growing proportion of the population in rural areas. Older people will benefit from the general thrust of the Strategy and specific targets such as improving patient transport, reducing waiting times, improving access and improving continuity of care. Some population groups are targeted in the plan, such as Aboriginal people and young children and families, but there is no specific consideration of older people in the plan. One of the sub-plans that is mentioned is the 'Healthy Eating and Active Living Strategy' and the ageing component of that plan is in effect delegated to FACS to lead. The Ageing Strategy does not appear to have had a material impact on the development of the Rural Health plan.
- *Social Housing* – the Discussion Paper on social housing released in November 2014 outlines three broad goals for social housing system: provides opportunity and pathways for client independence; is fair; and is sustainable. A key message of the Discussion Paper is the need to make better use of underutilised housing stock and to provide pathways out of social housing to living without government support. These messages are potentially threatening

to older people who are less able to move out of social housing being reliant on fixed incomes and not at a stage in their life when seeking employment is appropriate and who want to keep their connections to their local community and may generally be suspicious of any policy change. The Discussion Paper is likely to generate concern (in particular from the peak groups) about the impact on older people and that older people have not been sufficiently considered in the development of the paper.

## 12. Conclusion

### *Overall finding*

The Ageing Strategy has had a positive impact in promoting awareness of ageing in NSW and in improving the life circumstances of a proportion of older people. The NSW Government should renew the Strategy with a focus on a smaller number of key issues built on the learnings from the current Strategy.

### *Strategic direction*

The broad strategic direction for the NSW Ageing Strategy was appropriate, in term of:

- **Framing** – the Strategy tackled the right issues; targeted different age groups in cohorts and focused on both immediate actions and helping people to plan better for later life. It was also appropriate to tackle ageing as a ‘whole of government’ issue. More resources would have enabled the Strategy to have been more ambitious.

A particular feature of the Ageing Strategy was the selection of projects on the basis of:

- *a priority* – not necessarily the absolute highest priority, but nevertheless a priority for the target areas or issues
- *an opportunity* – there was an opening to take action that meant that there was a reasonable chance of success
- *a willing partner* – there was an agency with expertise and responsibility for the activity that could lead or substantially support the implementation. The expectation was that other agencies would lead key projects, with input from FACS or other agencies as required and that FACS would lead only a small number of the projects.

The suite of projects was a mix of initiatives that provided immediate services to older people (NSW Elder Abuse Helpline, Tech Savvy Seniors, Community Transport trial projects) and ‘hooks’ that kept the issue on the agenda with an expectation that the shape of the initiative would emerge from the work by FACS and partners (Housing Choices, Work skills).

This very pragmatic approach to project selection is important and is also supported by research, which indicates that ‘whole of government’ initiatives may need to be incomplete when they are first launched.

- **Governance** – the governance arrangements, with a high level IDC supported by officer level working groups was broadly effective. There may have been too many officer level committees and working groups for a small team to support. The Ministerial Advisory Committee on Ageing while working well was less aligned to the Strategy than it could have been and members of MACA indicated that there was still potential in the committee that was underutilised.
- **Systems** – the systems for managing the implementation of the Ageing Strategy were broadly adequate. Progress was monitored and reported. There was also enough flexibility to respond effectively to emerging circumstances and opportunities. The Strategy would

have been improved with the inclusion of performance targets and an evaluation framework.

- **People** – the team in FACS demonstrated an ability to build relationships and work towards shared goals. The contributing agencies were mixed in their ability to resource the highlight projects with appropriate staff – some actively engaged with the projects and provided dedicated staff and some were not able to provide resources. Government stakeholders mostly indicated that FACS staff were a valuable resource and complemented the skills and experience of their own teams. There has however been substantial change in the structure and personnel in FACS recently which is a risk to sustaining the momentum of the existing projects.
- **Leverage relationships** – all the government stakeholders reported relationships were collegiate and appropriate. The FACS team used their relationships to help drive outcomes in several projects. The FACS team was not able to successfully influence two larger agencies and was limited in its ability to build effective relationships with the private sector.

#### *Role of the peak bodies*

The peak bodies played a valuable role in the development of the NSW Ageing Strategy and conversely, the NSW Ageing Strategy guided the work of the peak bodies. Each of them responded appropriately to reshaping their work programs in line with the intentions of the Ageing Strategy. This included undertaking considerable research in both the areas of housing and transport need.

#### *Individual behaviour*

The individual changes in behaviour that can be attributed to the Strategy are modest. The key outcomes are:

- 11,000 older people increased skills and knowledge relating to new technology.
- 2,133 people called the NSW Elder Abuse Helpline. 100% of callers were ‘satisfied’ or ‘very satisfied’; 85% of callers had increased their ability to respond to abuse of an older person ‘a lot’; and 44% of callers had increased their ability to identify elder abuse ‘a lot’ or ‘a little’.
- 322 people attended education sessions on elder abuse. 90% of attendees reported that the information was presented well; 88% reported that the information was relevant to their needs; 88% were satisfied or very satisfied with the presentation/facilitation of the session; and 84% indicated that the information would assist them to review/improve their current work practices.
- 8% increase in people writing wills and small increases in knowledge of other legal instruments such as Power of Attorney and Enduring Guardianships.
- As a result of grants to local councils, 50% of the 26 grant recipients indicated that their council was very likely or extremely likely to do more around ageing as a result of success in the grants scheme; 46% indicated that the project had raised the profile of ageing in council ‘a lot’ or ‘a little’; 42% made additional financial contributions to the project to supplement the funding from the program; and 31% reported that they had undertaken additional

actions or initiatives (e.g. one Council applied for recognition as an age-friendly community from the World Health Organisation). Seven councils that were unsuccessful in their bid for a grant proceeded to implement some or all of the proposals that they submitted in the grant application.

- 19,000 downloads of the Seniors App and a 36% increase in subscriptions to the email newsletters.
- 852 passenger trips provided by a new community transport service between Young and Canberra between October 2012 and October 2013.
- Renewed commitment to the Older Drivers' Licensing Scheme (noting objections from one stakeholder group).

### Implementation

The effectiveness of implementation of the Ageing Strategy was mixed – four of the projects were ranked as 'high', four as 'moderate' and four as 'low'. Effectiveness of implementation was a function of six components (Table 27). The 'high' projects had most or all of these attributes.

**Table 27: Factors in effectiveness of implementation**

Factors in effectiveness of implementation		
	High	Low
Goal	Clear and specific	Undeveloped
Funding	Funding provided	No new funding
Partners	Willing partners who are actively engaged	No partners
Stakeholders	Actively engaged	Disengaged or not included
Concept	Well developed	Undeveloped
Focus	Targeted and specific	Broad and unspecific

There is a conundrum however, in that it is reasonable (and sometimes necessary) for 'whole of government' initiatives to be incomplete or undeveloped when they are commenced (and probably announced). The skill and expertise then lies in turning a sketch or an idea into a tangible project. Within the Ageing Strategy, the projects that were well-defined at the beginning were generally implemented effectively. It was more difficult to use the systems and processes around the Ageing Strategy to develop its new or speculative ideas into tangible and effective projects. The *Influencer* model indicates that identifying a target behaviour of the population (e.g. downsizing, using public transport) provides a focus for activity and some clarity about where effort could usefully be directed.

### Awareness

The NSW Ageing Strategy and highlight projects achieved a reasonable degree of penetration given the nature of the promotion of the Strategy and actions. Fourteen point four percent of people aged 50+ indicated that they 'know a lot' or 'know a bit' about the NSW Ageing Strategy. Awareness of the six highlight projects directly targeting individuals ranged from 8% to 14%.

However, in the absence of available benchmarks for similar strategies it is unclear whether this degree of awareness is particularly high or low. One NGO stakeholder has indicated that these figures appear to be relatively high.

#### *Major policy announcements*

There have been several major policy announcements that relate to older people in NSW in the life of the Strategy to date, including: the NSW Government decision to cover rebates on utilities and other bills for pensioners that were removed by the Commonwealth Government for one year at an estimated cost of \$107m; the Rural Health Policy, which did not target older people as a specific population group; and the Social Housing Discussion paper which also did not directly address the potential concerns of older people. The impact of the Strategy on all three announcements is unclear in terms of whether agencies and Ministers were more or less aware of the concerns of older people. However the latter two items indicate that NSW agencies have not yet made consideration of the needs of older people an explicit part of all their work.

## 13. Recommendations

The NSW population is getting older and the NSW Government needs to continue to pay attention to the impact of these changing demographics. The Ageing Strategy has demonstrated that is valuable to address these issues through a ‘whole of government’ approach.

This section makes a number of recommendations about the Ageing Strategy. It begins with a number of general recommendations. This is followed by a series of recommendations specific to each of the elements identified in this report which are important for an effective ‘whole of government’ Strategy (framing and agenda setting, governance, systems, people and culture and leveraging relationships).

### General recommendations

1. We recommend that the NSW Ageing Strategy be refreshed and strengthened in the following ways:
  - Focusing on a smaller number of key issues, and within those issues targeting specific behaviours.
  - Suggestions for focus areas are:
    - *Housing* – downsizing and actions that the Government can take to support older people who wish to downsize; creating more seniors housing
    - *Transport* – helping older people use public transport as they approach an age when they stop driving
    - *Health* – all older people undertaking at least 150 minutes of exercise per week
    - *Employment* – work with employer bodies to identify possible incentives to encourage the employment of older people
    - *Local Government*- work with Local Government NSW to roll-out a program of mentoring and support for local Councils to develop ageing strategies and link with Councils who have already developed strategies
2. Removing the ‘supporting strategies’ which tend to be announcements of work that is already underway.
3. Completing the existing commitments, specifically:
  - Continued roll-out of Tech Savvy Seniors
  - Continued funding for the NSW Elder Abuse Helpline and Resource Unit
  - Additional campaign for ‘Get it in Black & White’ in 2015
  - Support for the completion of the GAP Taskforce report and consideration of recommendations
  - Older Person’s Transport and Mobility project in Transport for NSW, including 6 monthly progress reports to the IDC
  - Round 2 of the local government grants.
4. Using the Age Related Expenditure Across NSW Government report as a foundation and other possible data sources (e.g. Intergenerational Report) develop forward projections of the impact of ageing and associated costs of intervention and non-intervention.

### **Framing and agenda setting**

5. Dedicating a meeting of the IDC to a facilitated workshop on future priorities for action in light of the learnings from this evaluation, including possibly developing proposals for new funding for Cabinet consideration.

### **Governance**

6. Increasing the number of meetings of the IDC to three per year and suggesting that the IDC consider how to better use and direct the working groups that report to it.
7. Develop and implement a system for the IDC for the ongoing monitoring and review of highlight projects through lead agencies.

### **Systems**

8. Finalising the initial Population Ageing Report Card within 12 months to provide a summary of the position of older people in NSW with an update every 3 years.
9. Preparing a report on NSW action for older people every 3 years, which would capture key actions by each portfolio for older people. This could be linked to the Population Ageing Report Card.

### **People and culture**

10. Ensure there are Champions promoting ageing across four domains- political, governmental, and non-governmental and business.

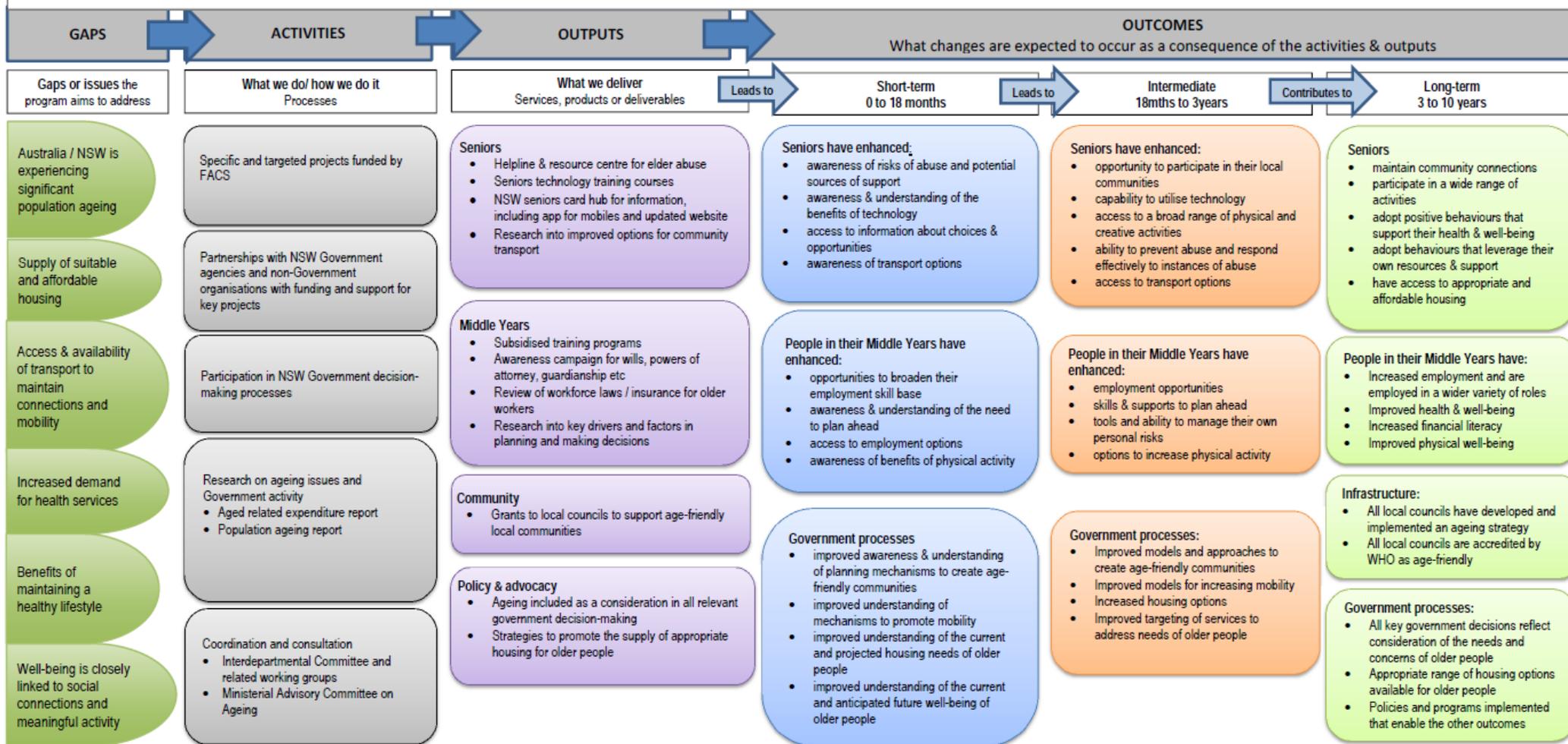
### **Leveraging relationships**

11. Design, recognise and recruit specifically for skills in leveraging relationships as part of any implementation team (FACS and partner agencies).

**Appendix A - Outcome Logic for the NSW Ageing Strategy**

Suggested Outcome Logic Map – NSW Ageing Strategy

Overarching Objective: NSW responds effectively to the challenges & opportunities of population ageing so that people in NSW experience the benefits of living longer



**Program Assumptions**

- Increasing proportion of the population will be older based on demographic projections
- Current taxation/superannuation/pension rules are maintained
- No change in Commonwealth/State responsibilities

**Key Stakeholders**

- NSW Government agencies
- Local Government NSW; Peak bodies (COTA, CPSA, TARS, OWN)

**Outcome indicators:**

- Personal Wellbeing Index score for people over 50
- % of older people satisfied with their life as a whole
- % of older people satisfied with their health
- % of older people reporting feeling safe
- Workforce participation rates for people over 50
- % of older people reporting regular social connection (e.g. volunteering; membership of a social group)
- % of people in their middle years with wills and plans
- % of local councils accredited as 'age-friendly'
- % of older people in housing stress
- % of older people getting sufficient physical activity

## Appendix B – Project Summaries

This section provides a summary of each of the twelve highlight projects undertaken as part of the Ageing Strategy.

### Tackling abuse

#### **Highlight project in the Ageing Strategy**

*The Government will establish a helpline and resource centre to reduce the abuse of older people, for example, financial and psychological abuse experienced by older people living in their own homes. This new service will provide practical assistance to older people, family members and frontline workers, on ways to reduce abuse. The service will also conduct community education and collect data. Responses to the abuse of older people in NSW will be overseen by a government committee.*

#### **Purpose**

It is estimated that around 5% of older people suffer emotional, financial or physical abuse, including psychological abuse and neglect. The project established an Elder Abuse Helpline and Resource Unit (EAHRU) through an open tender process. Catholic Community Services was awarded the contract and the service began in February 2013. The helpline was designed to assist older people themselves, concerned family and community members and frontline service and support staff. The Resource Unit function of the service includes training to frontline services (including the police), development and distribution of resources and increasing community awareness about elder abuse.

In addition to the EAHRU, the NSW framework for addressing and preventing abuse was developed. Titled “Preventing and responding to abuse of older people NSW interagency policy 2014”, this interagency policy updates an earlier 2007 protocol. It is designed to underpin state-wide interagency cooperation in responding to different forms of abuse. It sets out principles for action to guide the work of the EAHRU and the development of local/ regional protocols and practices at agency level within government and non-government and community organisations across NSW.

#### **Description**

The Helpline is available Monday to Friday 8:30 AM to 5 PM with an after-hours 1800 number.

Resource Unit staff can be booked for presentations across NSW on request.

An initial website has been established and work is underway to create a comprehensive new website with separate sections: ‘for everyone’, ‘for professionals’ and ‘about us’. Content will include:

- policy and toolkit
- education sections - What is Elder Abuse? Who is at risk? How do I help an older person?
- role of the Helpline
- events and education calendar with registration capabilities
- video links
- resources and publications
- Collaborative agency information

FACS developed a service specification for the Helpline and Resource Unit that was put out to tender. Catholic Community Services was selected via a competitive selection process ahead of 8 other applicants. FACS established a Steering Committee to oversee the implementation of the Helpline, guide future state-wide policy direction and provide expert interagency advice.

The Steering Committee has monitored the performance of the Helpline by tracking the nature of the calls and provided guidance on where the unit could best undertake its education activities.

The Steering Committee was restructured in late 2014 as by then the service was well established and required less oversight and the NSW Interagency protocol had been completed and released. The Steering Committee is now focused on the broader issues of Elder Abuse and the implementation of the protocol.

The Minister announced that there would be an Elder Abuse Helpline before the Ageing Strategy was finalised and released (but when there was already a public commitment to having an Ageing Strategy).

### **Target group**

Older people, family and community members, frontline service and support staff. Research suggests that the group most vulnerable to abuse are older women aged 75+.

### **Partners**

- The Helpline is managed by Catholic Community Services (a division of Catholic HealthCare) under contract. Catholic Community Services was selected via a competitive selection process ahead of 8 other applicants.
- The project has been managed by a Steering Committee chaired by FACS including representatives from NSW Health, Office of the Trustee and Guardian, Police (Domestic Violence Unit), Aboriginal Affairs, the Helpline providers, Aged Care Services, Commonwealth Department of Human Services (Centrelink), COTA and an academic with deep knowledge of issues relating to elder abuse.

### **Cost**

FACS provided funding of \$309,000 in 2012/2013 for the service then \$618,060 in 2013/2014 and \$633,450 for 2014/2015. Year 1 was for a half year of funding.

In-kind support included staff costs for Steering Committee members for establishment and oversight of the Helpline.

### **Outcomes**

A comprehensive descriptive overview of the NSW Elder Abuse Helpline and Resource Unit (EAHRU) can be found in the individual project summaries at Appendix A.

Additional quantitative data relating to calls to the helpline from its inception until the end of December 2014 can be found in figure X below.

Overall, the helpline has received 2,133 calls in this period, with 85% (1812) relating to the helpline and 15% (308) for the resource unit (e.g. booking information sessions).

Of those calls where the caller's relationship to the older person was known, the biggest group of callers were family members (41%), followed by service providers (29%). 17% or 280 calls were from an older person suffering harm.

The data shows that the top two categories of alleged abuse are psychological and financial and that most commonly the abused person is an older woman (75 years of age or older). Alleged perpetrators are most commonly adult sons, followed by adult daughters, most commonly aged between 45 and 64 years.

#### *Helpline*

- 100% of callers 'satisfied' or 'very satisfied'
- 85% of callers had increased their ability to respond to abuse of an older person 'a lot'
- 44% of callers had increased their ability to identify elder abuse 'a lot' or 'a little'.

#### *Education program*

- 88% reported that the information was relevant to their needs
- 90% reported that the information was presented well
- 84% indicated that the information would assist them to review/ improve their current work practices
- 88% were satisfied or very satisfied with the presentation/ facilitation of the session.

#### **What worked**

- **Tendering for the service:** FACS successfully developed a specification and engaged a contractor to deliver the service. Catholic Community Services has established a viable service that is meeting the specifications.
- **Use of a Steering Committee to strengthen partnerships:** The partnership with the Steering Committee members has been effective in raising the profile of elder abuse and bringing about changes in some of the respective organisations. NSW Police now fund two equivalent full-time positions as 'Vulnerable Community Support Officers' to respond to referrals for welfare checks, which might arise from calls to the Helpline.
- **Flexible specifications:** Flexible specifications allowed the delivery partner to develop the service approach in consultation with FACS. This has worked very well and has been a very productive relationship.
- **Branding as a government service:** The service has been branded as a NSW Government initiative and not as a Catholic Community Services initiative. Older people are generally more trusting of Government programs and this has been supported by other research. The branding may have helped with the profile of the service and the number of calls is still increasing as the service becomes more widely known. An updated website has yet to go live.

### **Lessons learnt**

- **It takes time to establish a helpline:** The service is relatively expensive for the support provided based on the cost per call (approximately \$500 per call currently). This is partly explained by the high fixed cost of the service irrespective of call volume. As services interstate have found, it takes time to build awareness of the service. Call volumes are increasing every six months. July to December 2014 call numbers were double the rate of the first 6 months of operation of the service.

### **Potential use of the model**

- This service was one of more recent services developed nationally and built on the experience of other states, especially Queensland. There is a new helpline in WA which has sought advice based on the NSW experience. A key feature of both the Queensland and NSW services is that anyone can call to seek support or information. Some of the other interstate models (Victoria, South Australia) require that the older person calls directly, thus limiting the scope of these services to empower advocates.

## Tech savvy seniors

### **Highlight project in the Ageing Strategy**

*The Government will provide low-cost training for older people so they can learn to use smartphones, tablets and computers. The training will help older people access information and make contact with family and friends, and will target people in their sixties who have not had the opportunity to develop these skills in the workforce. This program will be developed in partnership with existing providers of low-cost training such as community colleges and libraries and will reach across NSW. Partnership with philanthropic and industry bodies will also be explored.*

### **Purpose**

FACS identified that the 'digital divide' meant that older people were not using technology and were falling behind in their access to information. Technology was a priority issue for older people in NSW and the existence of the digital divide had been well documented in research. The purpose of this project was to provide free or low-cost training to older people around NSW with an interest in learning about how to use different devices and software programs.

### **Description**

The project evolved in two stages. The first stage was developed between FACS and NSW Education and Communities (DEC) and was a program of training for older people to be delivered by community colleges. The aim was to provide free or low cost training for beginners as a means of overcoming practical barriers to using new technology – e.g. smartphones, tablets, internet and email. The aim was for the training to be available broadly across NSW. Community Colleges were chosen as the vehicle as they had existing infrastructure and systems and already delivered courses for older people so understood how to engage and work with older people.

As the training was not an 'accredited' training course leading to a certification, the colleges had flexibility to choose what they delivered. Specific content was not mandated – colleges were asked to deliver training on a range of subjects, but they could choose the content to meet their local demand. The course was low cost or no cost to the participants – colleges were able to charge a small 'administration' fee and could also waive the fee at their discretion (e.g. hardship; person enrolling in five modules but only charge admin fee once).

There was no restriction on how the training would be delivered e.g. one short session, or five sessions over five weeks. The Steering Committee believed that 'short and sharp' was better (e.g. no whole day training) as this was more appropriate for older people and their learning style.

There was a minimum class size of 10 and the program had a notional funding level of \$50 per head, which colleges could supplement with other support e.g. access to their computer lab; provision of follow up support.

FACS and DEC initially undertook a trial in 2012 to test the approach. A review of the trial confirmed that it was worth proceeding and funding was rolled out in 2013. DEC developed program funding

guidelines, application forms and a range of information documents for colleges to support the funding round.

The broad roll-out was launched at Parliament House by the Minister with a similar launch event at a community college. Staff at Telstra saw the press coverage of the launch and realised that there was an overlap with their own 'digital literacy' program. This led to an approach to FACS to see whether there was any opportunity to work together. Telstra brought potential funding for more training plus existing resources (training videos) that could be used for the courses. The Steering Committee reviewed the offer and decided that the program could be expanded by using the Telstra funding to deliver courses at community libraries. This became the second component of the project. The materials from Telstra were made available for both the colleges and libraries but were not mandated.

FACS signed a Memorandum of Understanding (MOU) with Telstra covering commitments of both parties. An important feature was that Tech Savvy Seniors was not to be used as a vehicle for marketing of Telstra products e.g. data plans or phone plans. There was some co-branding of materials but the training was intended to be 'platform agnostic'. Stakeholders indicated that this was an important feature of the Telstra involvement and Telstra staff indicated that they were very supportive of this – they appreciated that the training would have been undermined if it had become a marketing exercise. Nevertheless, there had been some internal pressure from other parts of Telstra to involve some more explicit marketing, which the Digital Literacy team had to resist.

The State Library played a key role in engaging with community libraries and increasing the reach of the program. Libraries generally are playing a role in increasing the reach of digital information and there are some requirements to this end under the State Libraries Act. The State Library also has a position that is funded part-time to focus on older people and information. The State Library was an effective coordination point as the Library has contact details with key community library staff and details of available resources (e.g. computer labs).

The Tech Savvy Seniors program was able to effectively combine the resources available to develop modules which could be used by community libraries to deliver to their communities. The program was flexible in that libraries could determine whether to engage an external trainer or use their existing librarians (or, for example, use the funding to engage a casual librarian to cover the librarian's time) and to choose their own venues (some in-house computer labs, some off-site). The public libraries were required to deliver their training free of charge.

Training courses were rolled out in 2013 and 2014. FACS provided funding for the 2013/14 financial year and then additional funding in the 2014/15 financial year. In total, from January 2013 to June 2014, there were:

- 17,000 training spots
- 11,000 unique participants (some participants attended multiple courses)
- 36 community colleges and 64 community libraries which delivered training.

### **Target group**

Older people (60+) with an interest in using technology but no previous experience (beginners).

## **Partners**

- NSW Education & Communities
- NSW State Library
- Telstra
- Community Colleges Australia (peak body for community colleges)
- Australian Seniors Computer Clubs Association.

## **Delivery partners**

- Community Education Colleges
- Community Libraries

## **Outcomes**

Participants reported that attending a course with Tech Savvy Seniors had:

- increased their confidence in using information and communication technologies (ICTs) – 86%
- helped them to use one specific ICT device – 88%
- helped them to access information online – 77%
- helped them to stay connected with family or close friends – 73%
- helped them to access services online – 50%
- assisted in their involvement in community groups – 48%.

(Survey of 148 participants followed up after completion of the course.)

An evaluation of Tech Savvy Seniors undertaken by the University of Melbourne (funded by Telstra) found that the total project investment of \$1.55m generated social returns of \$17m (noting that the FACS investment was only \$588,000 so the return for FACS is higher) and the social return on investment ratio was 11 to 1 i.e. (\$11 value generated for every \$1 invested). There is some potential overestimating of some of the returns in that report, however it indicates a significant social return for the participants.

## Cost (\$ and in-kind)

**Table C1: Tech Savvy Seniors - Expenditure**

2012/13	
<i>Direct expenditure</i>	
<b>FACS (FACS)</b>	<ul style="list-style-type: none"> <li>▪ \$500,000 (funding to community colleges)</li> <li>▪ \$88,000 (administrative expenses)</li> </ul>
<b>Telstra</b>	<ul style="list-style-type: none"> <li>▪ \$200,000 (grants to public libraries)</li> <li>▪ \$240,000 (training for the trainers; DVD; training resources for the trainees)</li> </ul>
<i>In kind support</i>	
<b>Education &amp; Communities</b>	<ul style="list-style-type: none"> <li>▪ Part of 1 position, plus oversight</li> <li>▪ Membership of Steering Committee</li> </ul>
<b>State Library</b>	<ul style="list-style-type: none"> <li>▪ Part of 1 position, plus oversight</li> <li>▪ Membership of Steering Committee</li> </ul>
<b>Community colleges</b>	<ul style="list-style-type: none"> <li>▪ Membership of Steering Committee</li> <li>▪ Marketing, purchase of equipment, catering, room hire (estimated to be \$165,000)</li> </ul>
<b>Community libraries</b>	<ul style="list-style-type: none"> <li>▪ Marketing, trainers expenses, purchase of equipment, room hire (estimated to be \$120,000)</li> </ul>

### What worked

- **Identify the right issue** – one of the key factors in the success of the project was that the team had selected a key issue that was a concern for a large number of older people. Furthermore, there was a clear, common goal (increase the digital literacy of older people). This was also a factor in attracting partnership funding and input from Telstra – there was significant alignment in goals and aspirations.
- **A good model** – the training program was designed to be low-key so that there were very few barriers to participation by the target audience. There was considerable flexibility in the implementation allowing for local variation. There was also an element of assisting learning through social connections by making the training sessions social events. These were all factors that were important to the target group.
- **Willing partners** - the participants in the project were all willing and actively engaged. This in part came from the clear, common goal but also demonstrated that FACS could effectively build relationships with the partner organisations in a collegiate fashion. The participants reported that the relationships were positive and there was ‘give and take’ on both sides.
- **Flexibility** – all the partners indicated that the flexibility of the approach and the willingness to adapt to changes was a critical factor in the project. This was particularly clear with the involvement of Telstra which was not contemplated at the beginning of the project, yet brought substantial benefit and increased the reach and effectiveness to the project.
- **Corporate interest** – as indicated earlier, it was critical that Telstra’s involvement be platform agnostic and that it not have a flavour of being a marketing exercise. Telstra

brought additional resources and expertise to the project but on terms that were consistent with the project overall.

### Lessons learnt

- **Private sector relationships** – one of the key lessons for Government is that corporate entities sometimes have (maybe small) units with some funding in areas that directly overlap with Government interests. Telstra had a ‘digital literacy program’ managed by a small team and the aims and objectives of that team aligned with Government objectives. Similar (albeit small) teams are likely to exist in other large corporate entities e.g. healthy living/health promotion teams in private health insurance companies and life insurance companies. These are potential avenues for the development of potential partnerships.
- **Careful use of Government branding** – older people in particular, report that they have more confidence in programs that are supported by the Government (State or Commonwealth). Thus a program that combined resources under a government banner was able to achieve more than any one of the participants could have achieved alone. However, this trust is a valuable commodity and could be easily eroded so careful use of Government branding is critical.
- **Administrative complexity** – the community colleges reported that the administrative requirements for this project were higher than for other similarly sized projects, particularly around reporting of student numbers and outcomes. They also noted that the evaluation forms given to trainees on the completion of the courses were too complex. In the event, these were subsequently simplified. Notwithstanding this, the data collected by these processes has been useful in understanding the impact and reach of the project.
- **Funding for related support** - Initially the project provided funding for related support (e.g. a teacher’s aide in the classroom to increase the teaching ratio). This was scaled back so that the later rounds of funding were solely for course delivery. Colleges and libraries were free to add any extra support that they believed was required in their context.
- **Different levels of expertise** – colleges reported some issues with the classes attracting people of different levels of experience, or a very wide age range with different learning speeds. Some colleges were able to filter participants into streams of absolute beginners and people with a little experience, but not all colleges had this capacity.

### Potential use of the model

- **Targeted low cost training for older people** – older people are still actively engaged in life-long learning and will participate in training that is appropriately tailored to their needs. This suggests applied **courses** are likely to be effective if they include some common features: low cost; easily accessible; low key; modular; short sessions; and maybe a social element (e.g. morning tea) which enables the cohort of fellow students to become a new set of connections that helps reinforce the learning.
- **Model MoU** – the agreement between the NSW Government and Telstra is relatively simple and could be used as a model for other agreements for relationships between Government

and private sector partners. It provides for a clear agreement about the focus on program outcomes and prohibits a marketing exercise for the corporate entity.

## Linking seniors to information

### **Highlight project in the Ageing Strategy**

*The Government will expand the NSW Seniors Card program to provide access to government and local community information and involve seniors in developing policy and programs. These measures will respond to the growing number of Seniors Card members who have access to and are able to use the internet. Online communication will be complemented by telephone services. Specific initiatives may include a Seniors Card app for mobile devices, an improved Seniors Card website incorporating local social activities and targeted consultation with seniors in specific locations*

### **Purpose**

This highlight project recognised the shift to engaging with older people via the internet and other emerging communication channels. An active and healthy population of older people wants access to more and better information about their interests. Government is also developing different ways of engaging with the community and this highlight project flagged an intention to explore using the Seniors Card as a means of the Government and older people connecting. The aim is to extend this to create a network for members to also connect to each other in meaningful ways.

### **Description**

The Seniors Card is for people over 60 who work less than 20 hours per week on average per annum. It is free to join and there is no asset or income test. The card gives cardholders discounts from suppliers of goods and services for older people and its primary purpose has historically been as a discount and transport concessions card (concession funded by Transport for NSW). The program to manage the Seniors Card costs approximately \$2.2m per year and it aims to be self-funding by generating revenue from sponsors and suppliers. There are 1.3m cardholders, 700,000 of which get sent the hard copy (note, readership is greater as we limit it to one per household) directory of offers each October. Of the 1.3m members, 250,000 receive a monthly email newsletter, 300,000 have opted in to receive special offers by email and 900,000 by mail.

The first step in this project was the development of an app for mobile devices. The NSW Government ran a competition for app developers with the aim of getting small players to use government information in the public domain to feed into relevant apps. The Seniors Card was one of the options and the competition came with a \$15,000 prize. One of the pitches for a Seniors Card app won and the app has been developed and rolled out. Its primary purpose is to tell the user what Seniors Card offers are available in a local area – e.g. type in a postcode and it will show what offers are available in that area. Another function lists community events by locations. There have been over 19,000 downloads of the app (<2% of members). It has increased the functionality of the Seniors Card service but has not yet had a major uptake. FACS provided an additional \$100,000 to support the development of the app.

There has been a steady increase in the number of members signed up to the monthly e-newsletter from 164,000 in December 2012 to 224,000 in July 2014 and on average 46% of the email newsletters are opened by the recipients per month.

As a step towards building an on-line community, as well as connecting members with each other, there was a story telling competition where members were invited to submit stories. Sixty of the best stories were selected from over 1000 entries.

The other sub-projects that are in development are:

- More promotion via events and work with the private sector – Seniors Card is already a feature of some events like the Seniors Hub at the Royal Easter Show and the team is exploring options to increase the marketing impact.
- Links to key NSW Government agencies (health, transport, galleries and museums) so that the Seniors Card becomes a ‘hub’ for all information.
- Updated web design – ongoing improvement in the look and feel of the website. An external expert (Squiz) has been engaged and is working with the team on the upgrade.
- Improved data gathering – using Google analytics to track how, where and when data is being used and what is more effective.
- Linking data from Fair Trading about ratings of individual businesses (e.g. excluding businesses that have been the subject of multiple complaints).
- Developing online community discussion forums that could include content generated by the cardholders (e.g. local events and information; to be launched as part of the new website).
- Moving to all online so that there is no annual hard copy directory (saving in printing and distribution costs).
- Increased partnerships with the private sector (e.g. travel companies for travel related items, Utility providers, automotive companies, supermarket chains). An early trial of this was an agreement in 2013 with Woolworths where Woolworths offered a discount to cardholders during Seniors Week and paid for the promotion of the offer via the Seniors Card.
- Increased revenues from third parties including private and public sector.

The Seniors Card project is not very visible to the IDC or MACA as it is still under development. This meant that there was little comment from stakeholders about this activity. One NGO stakeholder noted that the Seniors Card is only perceived as being a discount card and it was potentially confusing to try to use it as the avenue for other information or activities.

FACS had formerly funded a standalone ‘Seniors Information Service’ which has been migrated to Services NSW as the first point of contact for inquiries about NSW Government services. The Seniors Card team is working with Services NSW on providing a coordinated information service..

### **Target group**

Seniors Card cardholders (people over 60) (85% of people aged 60 and over in NSW have the card).

## Outcomes

There is no available data indicating increased usage of suppliers or increased knowledge of cardholders.

## What worked

- **Increasing online subscriptions** – the steady growth in subscriptions to the email newsletter indicate that older people are engaging more and more with digital information.

## Lessons learnt

- **More targeting** – older people are not a homogenous group. The needs and interests of a 60 year old are very different to the needs and interests of an 80 year old and there is no 'typical' 60 year old or 80 year old. It is a consistent theme throughout the highlight projects that 'life stages' are a useful frame for thinking through what is helpful and relevant to older people: planning for retirement; transition to retirement; living well in retirement; planning for later life.
- **Needs are changing rapidly** – the profile of users will change rapidly over the next ten years as younger people more familiar with technology reach older age groups e.g. the use of the internet by 75 year olds will increase both in terms of how often they use it and activities they use it for. The Strategy for the future of an online information hub will need to adapt to these rapid changes.

## Potential use of the model

- There is no specific model developed as yet in this project. The team is still developing an approach for how the NSW Government can provide an efficient and comprehensive information service which targets older people.

## Living active lives

### **Highlight project in the Ageing Strategy**

*The Government will target people aged 65 and over as part of its commitment to increase participation in sport and recreation by 10 per cent. Partnerships with peak organisations, health promotion agencies and government will provide opportunities for joint planning to address the physical and recreational, social and volunteering needs of older people. Local communities will be able to improve and develop sporting and recreational facilities and projects through an existing grants program administered by the Department of Sport & Recreation.*

### **Purpose**

The project was an enhancement of the NSW government's wider community commitment to a 10% goal ('increase overall community participation in sport, recreational, arts and cultural activities in both Sydney and rural and regional New South Wales from 2010 to 2016 by 10%' - Goal 27) as part of the New South Wales 2021 Plan.

Overall, the Living Active Lives highlight was seen as contributing to three goals of the NSW 2021 Plan - Goal 11 (Keep people healthy and out of hospital), Goal 25 (Increase opportunities for seniors in NSW to fully participate in community life) and Goal 27 (above).

It was envisaged that partnerships with peak organisations, health promotional agencies and government would provide opportunities for joint planning to increase the number of older people participating in physical, creative and social activities and volunteering. An existing grants program administered by the Department of Sport and Recreation would be used to assist local communities to improve and develop sporting and recreational facilities and projects.

Active living was seen as an important part of assisting people to maintain good health and well-being as they grow older. In particular, regular physical exercise was recognised for the role that it plays in increasing well-being, the chance of a healthy life expectancy, lowering risks for falls and for other chronic health issues such as heart disease, diabetes and obesity.

In the supporting strategies, under the goal 'enhance cultural, creative, sporting and recreational opportunities for seniors' a number of additional actions beyond sport and recreation were included:

- support creative activities and access to cultural opportunities for older people, including existing Arts NSW programs
- identify collaborative opportunities with industry and peak organisations to increase access and participation for seniors
- promote lifelong learning for seniors, through organisations such as libraries, community colleges and community groups
- promote intergenerational activities where younger people in the community can get to know members of the older generation and vice versa
- encourage local initiatives that make better use of local infrastructure and facilities to benefit seniors.

These broader actions were reflected in some of the initiatives which were undertaken as part of the Living Active Lives highlight project which moved it beyond a focus on just physical activity.

## Description

### Seniors Week

Seniors Week included a symposium as an opportunity to progress conversations about active ageing. The first symposium was in 2013 and the chosen policy topic for the week was technology. This included conversations about demographic changes and what older people want included physical activity. This resulted in the chosen theme for 2014 Seniors' Week being physical activity: '*Doing 60 in a 40 zone*' and the 2015 theme being creative activity.

FACS also took the opportunity to interview and video people attending the Seniors Week concert about their views on exercise and physical activity and explored reasons why older people might not engage in physical activity. There was however, a general sense that they were talking to the converted (people who were active enough to get to the concert).

There was a view that there needs to be more visibility of older people talking about their involvement in physical activity. The best motivation is showing real people doing real things and that there is a shortage of this sort of imagery.

### Physical activity

Three programs were run in partnership with other agencies:

- **Give it a Go** (NSW Government Office of Sport- Sport and Recreation)

This was a one-week program run in sports and recreation centres across New South Wales (there are 11 centres across NSW), for those of middle age (under 60) and then repeated for those over the age of 60. The idea of the week was to give people an opportunity to try a sporting activity which they may not have previously attempted. Run initially in Seniors Week in 2013, it was repeated in October/ November 2013.

FACS assisted with promotion through both Seniors Card and peak bodies ie: COTA NSW, OWN .

*Give it a Go* has now become a regular feature on the Seniors Week program and will be repeated again during NSW Seniors Week 2015.

- A pilot project at 13 sites (e.g. local council pools) offering land and water based activities, including a social component, was developed with the Aquatic and Recreation Institute
- **North Coast Seniors Expo** – FACS co-sponsored an information stand at the 2013 Expo with Exercise and Sports Science Australia

### Creative activity

FACS was keen to foster the linkage between arts and healthy ageing and sponsored one day of an arts and health conference held in Sydney in November 2013. From the opportunity created by having these 'experts' in town, a Creative Ageing Policy Forum was also held. This was moderated

by Kathryn Greiner (chair of MACA). From this emerged a 'creative ageing funding program'. This involved:

- **An exemplar project** – \$50,000 grant to Arts NSW for a storytelling program to involve creative ageing
- **Regional Arts NSW** – \$50,000 grant to enable the funding of up to 3 projects
- **Local Government grants** - \$100,000 in grants of up to \$4,000 per local government (e.g. Lane Cove older people's band).

A storytelling event was run through the Seniors Card under the title of 'Who am I?' Over 1,000 entries were received and 50 of those were chosen to be published in a book.

### **Refreshed approach**

A new steering committee 'The Participation and Ageing Committee' has now been established which creates an opportunity to reflect on what has been done and determine future directions. Members include Sport and Recreation, Exercise and Sports Science Australia (ESSA), Arts NSW MACA, NSW Health and Local Government NSW. The terms of reference are broad and use the umbrella of increased social participation to encompass both physical activity and creative ageing. It is anticipated that the committee will oversee the development of partnership projects to increase the number of older people participating in activity (sport, arts, recreational and cultural activities). It meets quarterly.

### **Target group**

Although Living Active Lives was a highlight initiative for the senior years, activities were offered for people both below and above 60 years of age.

### **Partners**

- NSW Government Office of Sport - Sport and Recreation
- Local Government
- Exercise and Sports Science Australia
- Fitness Australia
- COTA
- Arts NSW

### **Outcomes**

- **Raised awareness** – the impacts have not been measured, but the promotional activities and pilot programs will have had a small impact in raising awareness about ageing and physical activity and ageing and creative activity.

### **Lessons learnt**

- This is an area in which there are a large number of players and interests. FACS team reported difficulty over the past 18 months in working out who to involve and what activities to undertake.
- The breadth of potential activities meant that the Living Active Lives highlight did not have a clear focus. This also meant that creative ageing became part of living active lives. A number of different things have been tried, but without an overall strategic intent.
- There is a need for appropriate physical activity opportunities for older people run by skilled individuals – it may be possible for example to work jointly with Fitness Australia (responsible for overseeing fitness instructors linked to gyms), local teachers of classes (e.g. Zumba) and the academics who are responsible for training people working in both the fitness industry and the health system to develop modules specifically around physical activity and ageing. For example, in *'Give it a go'*, some of the activities were pitched at younger people and were not sufficiently adapted to an older participant group; staff were also not adequately trained or experienced in working with older people.
- Much of the activity undertaken as part of this highlight represented a 'drift' from its original narrower focus on physical activity to broader creative and cultural pursuits as described in the supporting strategies. This has been cemented in the terms of reference of the recently formed 'Participation and Ageing Steering Committee'.

### **Potential use of the model**

- There was no specific model developed by this highlight project.

## Travelling safely

### **Highlight project in the Ageing Strategy**

*The Government will promote the independence and safety of older drivers, and the safety of passengers and pedestrians, by investigating programs that encourage older drivers to drive safer vehicles; supporting local councils to deliver pedestrian access and mobility plans; reviewing the NSW Older Driver Licensing Scheme; and developing programs to help older people transition from driving to using other forms of transport.*

### **Purpose**

Transport is a high priority issue for older people and is closely linked to overall well-being, in that older people without access to transport can become disconnected from their communities and families, become less active and have difficulty accessing needed services.

The Travelling Safely highlight project was tackling a small number of specific issues, and also included as a 'hook' in the Strategy as a means of continuing the discussion about transport for older people and keeping a focus on ageing and transport.

### **Description**

Action on some of the key deliverables was already underway at the launch of the Strategy. Specific actions that have been completed are:

- The Older Drivers Taskforce (including Roads & Maritime Services, expert advisors and stakeholders) completed the review of the Older Driver Licensing Scheme and recommended that the licensing system be maintained. The recommendations included rolling out an education campaign about safer driving which has been implemented ('On the Road – 65Plus'). One stakeholder group was unhappy with the review process however and resigned from the Taskforce.
- One local council was funded to develop a pedestrian access and mobility plan through the Age Friendly Grants project

As part of the development of the Travelling Safely project, FACS worked with TfNSW to find a way of raising the profile of ageing and the transport needs of older people within the agency. FACS provided \$613,000 funding to the Community Transport section of Transport for NSW for 6 key projects:

- **Young to Canberra Community Transport Trial** – same day return service from Young to Canberra, three days per week for 12 months. Total of 1,549 passenger trips, 55% of which were for people over 50. TfNSW continued to fund the service on completion of the trial for two days per week.
- **Yass Valley Mobility Officer and Travel Training Project** – employment of a Project Officer at Yass Council for two days a week to focus on travel options and travel training. Limited activity because of difficulties in recruiting to the position; local transport information has been collated and is available on the Council website and the Project Officer met with local groups to explore travel needs.

- **Albury Link Social Inclusion Project** – Project Officer in a non-Government organisation to undertake travel research. The research findings identified: the target group lacked knowledge about local transport options; a desire for public transport on weekends and on weeknights (especially Thursdays); uncertainty about travel concessions; and a lack of knowledge about taxi discounts and concessions.
- **Moving Forward** – employment of a Project Officer on the Mid North Coast to undertake an action research project trialling different transport solutions for older people covering eight local government areas. Clear finding that older people rely on driving their own car, and when they can no longer drive, expect to rely on community transport. Travel training trial not successful. TfNSW advises that the project identified a range of cultural drivers and views on the use of public and community transport and contributed to research on the use of public transport in rural areas.
- **Travel patterns of older Aboriginal people** – consultancy to gain a better understanding and knowledge of the travel patterns and experiences of older Aboriginal people living in NSW. The report indicated that there was potential to provide better transport services for Aboriginal people and made seven broad recommendations, including better utilisation of community transport and HACC services and working with local bus operators.
- **Travel training** – travel training project for older Aboriginal people based on the outcomes of the previous project. Project did not proceed and TfNSW advises that the funding has been directed to other projects.

At a broader level, the NSW Government released the NSW Long Term Transport Master Plan for Sydney in December 2012. The Master Plan is a comprehensive articulation of the transport aspirations for NSW for 20 years and is intended to be a framework to guide major investment decisions and ensure that transport and land use planning are effectively integrated. The Master Plan includes a range of commitments that had implications for older people, including improving access to transport services (e.g. lifts at stations) and reducing transport inequality. There are also commitments to working to improve the effectiveness of community transport, which is heavily used by older people (particularly by people who receive support through the Home and Community Care Program (Home Support Program from 1 July 2015)).

The Master Plan indicated that the NSW Government would develop a Social Access Framework that would deal with the needs of a range of specific groups, including older people. The Social Access Framework is now expected to be developed later in 2015. Representatives from Transport for NSW indicated that the Ageing Strategy had not increased the profile of ageing in the context of developing the Long Term Transport Master Plan in as much as ageing was already an issue under consideration.

FACS liaised with Transport for NSW to identify how to have more influence over planning for transport for older people. The result of these interagency discussions is that FACS has funded a position in Transport for two years to undertake further research on older people's travel needs and to develop a long term Strategy so that the system can support older people to stay active. A Steering Committee was established in late 2014 to guide the development work. A particular focus is on managing the transition from being a driver to being a non-driver and teaching people to use

public transport gradually so there is not a sudden loss of mobility when they are no longer able to drive.

### **Target group**

People 65+; particularly older people getting to the end of their driving careers.

### **Partners**

Transport for NSW.

### **Outcomes**

- Five out of six Community Transport projects completed. Of those, four were research projects so do not have an outcome beyond the delivery of the report. The Young to Canberra Transport Corridor project has attracted additional funding from TfNSW and Young Shire Council so the service has continued and expanded to Wagga Wagga. TfNSW advises that the projects have acted as a catalyst for further activities aimed at improving community transport and have generated data for the development of methods for assessing unmet community transport needs.

### **What worked**

- The funding of a position in Transport has been a success in that it creates an opportunity to generate influence and leverage within the agency. This has been the result of developing sufficient relationships between FACS and Transport for NSW to enable the development of a project with shared goals and commitment.

### **Lessons learned**

- **Raised profile** – whilst including Transport as a highlight project was intended also as a ‘hook’ to raise the profile of ageing in transport, this approach appears to have been limited in its effectiveness. The planning processes within Transport were well progressed at the time the Ageing Strategy was developed and there appears to have been limited scope to increase the consideration of ageing.
- **Timing** – given the relatively short time frame to both develop and finalise the Ageing Strategy, there was insufficient time available to explore issues in detail with Transport for NSW. The commitments around Transport in the Ageing Strategy are therefore relatively modest, with the result that the more meaningful dialogue between FACS and Transport for NSW occurred after the Strategy was released. This is partly because the cycles of planning in Transport are necessarily long and so change is relatively gradual.
- **Expertise** – one stakeholder indicated that FACS did not have sufficient expertise or understanding of ageing and transport to be able to provide the right level of advice or input in the policy discussions that have taken place over the last two years.

- **Management of joint projects** – the funded Community Transport projects have produced limited results and demonstrate that joint project development and management is an area in need of improvement. The key issues are:
  - *Agree expectations* – participants need to establish mutual expectations at the beginning of the projects tied to the overall strategic goals
  - *Ongoing monitoring* – clear mechanisms need to be agreed for regularly reporting progress and for intervening when projects may not be delivering as intended
  - *Reporting* – the process for reporting progress to the funding organisation (in this case FACS) and to the overseeing body (the IDC) needs to be clear with specific timeframes and commitments.

#### **Potential use of the model**

- **Funded position** – funding a position in Transport may be an effective way of driving change within the agency and is an approach that has been used in other contexts. This provides resources for new information and ideas and may enable change to occur from within the organisation (which can be effective where there are internal obstacles or resistance). This can be a good approach when a small unit is trying to influence or generate change in a large agency. Being within the agency provides the opportunity to build relationships and frame issues in a way that can align with the agency's own objectives and ways of doing business. As the position only commenced in late 2014, it is too early to indicate whether it has achieved the intended outcomes.

## Work skills, workplace value

### **Highlight project in the Ageing Strategy**

*The Government will target people in their forties and early fifties who do not have formal qualifications to give them access to subsidised training programs. This will give people an opportunity to improve their long-term position in the labour market and exercise greater choice over where and how long they work. The Government will also review the impact of current laws and insurance regimes, including workers compensation, on workforce participation by older people.*

### **Purpose**

The consultation process for the Strategy identified a need to support people in their middle years to remain in the work force or return to it after a life event. Research has demonstrated that if people remain working there are benefits at both an individual level (health and well-being) and at a systemic level. The Strategy was developed during the time that the Australian Law Reform Commission was reviewing workers compensation legislation, including how this may impact on people remaining and/or returning to the work force.

### **Description**

This project was initially slow to get going as some of the other highlight projects needed to be implemented immediately. There was also uncertainty around what was the role of the State Government in this domain when so many of the rules and programs around employment are the responsibility of the Commonwealth Government.

The key activities were:

- **Mature Aged Worker Program** – the Adult and Community Education Unit in the Department of Education and Communities established a funding program for Community Colleges to work with stakeholders and identify what skills needed for older people in their areas. This developed into a targeted program with modules rather than Certificates. Community Colleges submitted applications for funding. FACS sat on the assessment panel for the bids. Funding was provided to those who would be able to meet the needs of the cohort at the local/regional level. This was a precursor to ‘Smart & Skilled’.
- **IDC Subgroup** – the subgroup was convened after IDC meeting in 2013 to discuss current activities by each agency and collectively how the NSW government could increase the productivity and participation of mature age people into the workforce. The subgroup met on three occasions (Aug, Sept and Dec 2014). Stakeholders are DPC, Treasury, COTA, Trade & Investment, DEC and FACS.
- **Smart & Skilled** – *Smart and Skilled* is a reform of the NSW vocational education and training system. This is a broader program of support for post-school training, which provides subsidised training for anybody over 15 if they have left school. Whilst older people are not specifically targeted, they are eligible for support. Welfare recipients (e.g. age pension or

Newstart allowance) receive additional support. Training covers courses up to Certificate IV or Diploma levels. The program commenced on 1 January 2015<sup>7</sup>. One of the key differences is that an individual pays for a qualification, not for an individual subject or set of subjects, so students know what their total cost will be at the beginning of a course. DEC staff have indicated that the Ageing Strategy has raised the awareness of ageing within their agency and that older people were taken into account in the design of the program.

- **Smart Work Hubs (Trade & Investment)** – NSW Trade and Investment is currently trialling five work smart hubs located in Western Sydney and the NSW Central Coast. The hub offers workers an alternative to either working in their normal place of work or working from home. For example, a person may work in the hub for two to three days per week, commuting to the office on other days. The model is very suitable for tele-parenting, an older person with caring responsibilities, and an older person who doesn't want to commute anymore/ deal with the Sydney traffic. Recently opened, trial will explore whether hubs are attractive and viable enough to attract investment from the private sector. This model has potential for older workers and the transition to retirement period.
- **Global Access Partners Taskforce** – GAP is a privately funded think tank which approached FACS proposing to cooperate on a project. GAP's expertise is in facilitating conversations – their method is to pull key people together and focus on dealing with specific issues (further detail below).
- **Workability study** – FACS was also overseeing the completion of the 'Workability' study, which had been funded through the Ageing Grants Program prior to the development of the Ageing Strategy. The final report was submitted to FACS in June 2014. The aim of the study was to test the 'workability' assessment instrument and to review the impact of interventions at six case study sites in NSW. The main findings of the study were that the instrument is a useful tool and that a champion and organisational support from the top level of management are required in order for a work place to have a positive impact on an employee's work ability. This report was not directly linked to the commitments in the Ageing Strategy and to date has not resulted in any further activity.

### **Global Access Partners Taskforce**

Global Access Partners (GAP) organised a 'Future Without Age' conference in May 2013 with the Australian Centre for Health Research (ACHR) held at NSW Parliament house, which was also supported by MACA. Following the conference, the CEO (Peter Fritz) approached FACS and MACA to assist in setting up a Taskforce to focus on mature aged employment.

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<sup>7</sup> From 1 January 2015, Smart and Skilled provides eligible students with:

- an entitlement to government-subsidised training up to and including Certificate III
- government funding for higher-level courses (Certificate IV and above) in targeted priority areas.

The Taskforce has chosen to focus on the large number of individuals aged 45 to 64 who are not working due to poor health arising from conditions that can be successfully prevented, delayed or treated. The Taskforce recognised that there were currently a number of pilots and programs underway, including health interventions designed to minimise the time people are out of the workforce or intervene before they leave. Key researchers involved in some of these activities have been invited onto the taskforce.

The task force has met three times in 2014 and is scheduled to meet twice in 2015 (March and June).

A discussion paper 'Work is Part of the Solution' was prepared following the initial meeting. This paper recognised that there were two distinct cohorts affected by work health issues:

- people already disconnected from the workforce through a health issue
- employees who have recently left the workforce or at risk of leaving the workforce due to pain and health related problems.

The focus of the discussion paper was on the latter group of individuals. Key objectives/principles suggested by the document were:

- minimising the economic and social effects of health-related workforce disconnection
- developing an effective and responsive insurance system
- early identification and intervention to keep people in work
- improved understanding of what flexible work arrangements mean for a maturing workforce.

Task force members agreed to advance a number of project ideas including: developing a relevant insurance product; encouraging self-employment options for older workers; a scalable workplace pilot initiative with a private employer for an expansion of the early return to work project in the public hospital system; and measures of success and impact on productivity.

At the December 2014 meeting, it was reported that a proposal had been offered to Woolworths for a trial of an early return to work intervention, involving both an intervention and control group over three years. It was estimated that the cost of the trial would be fully recouped within two years.

Costings and other project proposals will be considered at the March 2015 GAP meeting.

### **Target group**

People aged in their forties and early fifties who do not have formal qualifications, and mature workers who are already in the workforce.

### **Partners**

- Department of Education and Communities (Adult & Community Education)
- Community colleges
- Global Access Partners (GAP) and Taskforce Members.

## Outcomes

To date there is no available data to indicate increased workforce participation or continued engagement as a result of the efforts under this highlight Strategy. The *Smart and Skilled* program commenced on 1 January 2015 and the GAP task force projects are still under development.

## What worked

- The GAP Taskforce has brought together senior cross government, industry and academic leaders to focus on developing sustainable policy approaches to improve productivity and health outcomes for older workers. The involvement of GAP as the primary driving partner provided momentum, key contacts and member commitment to action. Number of potential projects have been discussed and progressed but have yet to be delivered.
- Trade and Investment stakeholders were clear that ageing is now seen as a mainstream economic issue, not just the preserve of health and social agencies.

## Lessons learnt

- There are many barriers to older people being in the workplace – ageism, cultural, structural, work place discrimination, flexible work arrangements, tax issues, physical ability to do work, injuries/ illnesses.
- The target age for this highlight is 45-65 which is huge – it captures a lot of life stages for people (e.g. people re-entering the work force after children through to those in the last stages of their careers).
- The State Government's role in this area is unclear. As employment is primarily a federal issue, it has been a challenge identifying what role the State Government should play and what influence it should have at a national level.

## Potential use of the model

- This work of the GAP Taskforce models a mechanism which has been able to draw together diverse stakeholders to develop proposals for projects to work on areas of common interest.

## My life, my decisions

### **Highlight project in the Ageing Strategy**

*The Government will fund community education activities to increase the number of people completing Wills, Power of Attorney, Enduring Guardianship and Advance Care Directives. This will build on the successful Planning Ahead Tools website ([www.planningaheadtools.com.au](http://www.planningaheadtools.com.au)). Education activities may focus on major transition points such as the birth of a child, marriage and buying a home. Activities will target people in the middle of their lives and will include strategies to specifically target groups with very low rates of completing these documents.*

### **Purpose**

This project aimed to increase the number of people completing planning ahead documents – Wills, Power of Attorney, Enduring Guardianship and Advance Care Directives and to enhance the existing Planning Ahead Tools (PAT) website. The target was people in the middle of their lives and the project included strategies to reach groups with very low rates of completing these documents.

The benefits of increasing the uptake of these documents are:

- reduced reliance on the Government as Trustee for people who die intestate
- clearer guidance to families about managing estates
- reduced reliance on NSW Trustee and Guardian (TAG) for frail aged people who are no longer able to make their own decisions if these individuals have earlier nominated their own guardians and provided some guidance for the decisions that are to be made on their behalf
- individuals are able to give clearer guidance to their families and medical support teams.

This is particularly important because with increases in the number of older people, there will be an increasing demand on Government services.

### **Description**

FACS provided funding and worked with the NSW Trustee and Guardian to develop a mass media campaign titled 'Get It In Black & White'. The campaign objectives were:

- to raise awareness and educate the community about Wills, Powers of Attorney, Enduring Guardianship and Advanced Care Plan documents
- to dispel superstitious beliefs on will making and myths relating to the cost and complexity of planning for later life documents including Wills, Power of Attorney, Enduring Guardianship and Advanced Care Plans.
- to inform the community of the benefits of completing Wills, Power of Attorney, Enduring Guardianship and Advanced Care Plans.
- to increase awareness of the planning ahead tools website [www.planningaheadtools.com.au](http://www.planningaheadtools.com.au)

The NSW Trustee and Guardian provided additional funding and the campaign was rolled out with the assistance of the Public Guardian and Law Access.

### Key components of the project:

- **Research** – a survey on Australian attitudes towards planning for later life (Longerman), a pre and post campaign survey (Seniors Card holders) and regular Newspoll survey of general attitudes and behaviours (e.g. having a will).
- **Creative content** – engaged an advertising firm to develop creative content and test the content with focus groups.
- **Mass media campaign** – radio, TV and print advertisements promoting the need for wills and other documents. The campaign was delivered at end of October/ November 2013 and January/ February 2014. The campaign consisted of five creative messages designed to start conversations around the important questions of what happens to a person and their assets when they die or lose capacity. It targeted five life stages: a growing family; getting married; buying a house; intending to retire; and ‘not in good health’
- **Updated PAT website** - to link to the campaign, having the same look and themes. Additionally a 1300 enquiry line, supported by LawAccess NSW, allowed people to call and ask further questions relating to the completion of planning ahead tools.
- **Launch event** - organised stakeholder and media *Get It in Black & White* launch event at Parliament House. The launch included a celebrity spokesperson (Tracey Spicer) who was the ambassador for the campaign.
- **Case studies** - Video of carer’s case studies aired at launch event and featured on PAT website. Two carers shared their experience caring for loved ones who could no longer make decisions for themselves and discussed the importance of planning for later life.
- **Ethnic media** - worked with key opinion leaders to tailor ethnic media releases to Greek, Italian, Arabic, Chinese and Vietnamese communities and distributed to relevant media outlets.
- **Stakeholders** - provided information for newsletters for key stakeholders e.g. seniors, carers and medical professionals. Also drafted letters for a stakeholder pack to send to financial planners, libraries, clubs, seniors, solicitors, child care professionals, local councils, clubs and libraries.
- **Media packs** - distributed media packs to regional print media with localised research about how many adults with ageing parents had discussed later life decisions with their parents. Bags included a *Get it in Black & White* branded teddy bear. Also distributed packs to lifestyle, parenting and money media (print and online). All media material was followed-up with a phone call.
- **Interviews** - pitched Planning for Later Life to TV and radio programs in Sydney Metro and regions.
- **Medical press release** - wrote Planning for Later Life press release for medical professionals and distributed via email.

The immediate impact of the campaign was:

- approximately 60% of people in Sydney and regional NSW aged 35 years or older saw the 'Get it in Black & White' TV commercial and 1.8 million people saw a 'Get it in Black & White' press ad in the Sunday Telegraph
- there were 78 media pieces following the launch - 34 print articles, 29 radio pieces and 15 online pieces – which reached an estimated 5.37m people
- there was an increase in total visitors to the PAT site - from November 2013 to March 2014, there were 63,754 visitors, or an average of 12,750 visitors per month, compared to an average of 1600 visitors monthly prior to the campaign. 80% of visitors were first time users
- 10,300 'Get it in Black & White' information kits sent to key stakeholder groups and the community
- increase in traffic to the Public Guardian website with a 400% increase of hits to the Enduring Guardianship page
- 165 hours of video viewed via YouTube hosted on the site.

NSW Trustee and Guardian and NSW Health are developing a microsite (as part of the PAT website) for clinical and healthcare workers focused on end of life decisions, aimed at educating both those working in hospitals and the general healthcare community about the options available to consumers and the benefits of pre-planning for their end of life choices.

A second phase of the campaign is scheduled for April 2015 to continue to increase public awareness of planning ahead tools, as well as creating an active response to completing the planning ahead documents. In addition, a pre-planning resource for Aboriginal people will be completed and the importance of Advance Care Planning will be included in some of the targeted advertising.

### **Target group**

People 45 years and over. The campaign also included a component for culturally and linguistically diverse (CALD) communities.

### **Partners**

- NSW Trustee and Guardian
- NSW Health
- Law Access
- The Law Society

## Outcomes

**Table C2: Outcomes – Get it in Black and White**

Objective	Outcome <sup>8</sup>	Data source
Increased number of people making a Will	1111% increase in people making a Will (from 73% to 81%)	Newspoll
	6% increase in those considering making a Will with a solicitor	Newspoll
Increased awareness of the existence of all planning ahead documents including Wills, Powers of Attorney, Enduring Guardianship	3% increase in knowledge of Power of Attorney (105,900 people aged 35+)	Loneragan
	3% increase in knowledge of Enduring Guardianship (132,800 people aged 35+)	Loneragan
	4% of people who had not made an Enduring Guardianship were now open to making one (151,200 people aged 35+)	Loneragan
	4% increase in knowledge of Enduring Guardianship for people aged 60+	Seniors Card survey
Increased awareness of where to get further information on how to complete a Will, Power of Attorney and Enduring Guardianship	3% increase in the proportion of people who are aware of the PAT website	Loneragan
	7% increase of people who had heard messages in the media regarding planning ahead with Wills, Powers of Attorney and Enduring Guardianship	Seniors Card survey

### What worked

- **Partnership** – for FACS, the partnership with NSW Trustee and Guardian was very productive as the staff of the Trustee and Guardian brought expertise in designing and managing a mass media campaign; for NSW Trustee and Guardian, the funding from FACS enabled the delivery of a campaign that it could not have funded itself. The team developed effective relationships and worked well together.
- **Clear and shared project aims** – the participants all understood the aims of the project and so were able to direct their collective effort to the delivery of the project.
- **Good project management** – the process of designing and delivering a mass market campaign was understood, including commissioning an agency to develop creative content, testing the content on focus groups and ongoing monitoring to track whether the advertisements were reaching the target audience.
- The campaign trialled an ‘all of life’ focus on planning that included health and lifestyle, not just finances. This was found to be successful so has been adopted for future work by NSW Trustee & Guardian.

<sup>8</sup> *Planning Ahead Stakeholder Report, Get It In Black & White Campaign, Phase 1 November 2013 – April 2014, NSW TG*

- A good relationship between TAG and the Law Society - the Law Society plays an important role in getting the message about planning ahead tools to the broader community including the legal fraternity.

### **Key learnings**

- Tracking the proportion of people who have taken up the three legal documents (wills, Power of Attorney and Enduring Guardianship) is unlikely to show much change in the short-term. Affecting behaviour change in this area is difficult as the subject matter is sensitive and difficult to initiate.
- Capturing statistical results that show increases in the uptake of Wills, POA and Enduring Guardianship is difficult as there is no centralised system that records this data.
- The initial TV spot buy was impacted by the late availability of the spot list by the agent with no time for feedback and changes. This resulted in some of the campaign commercials being aired around TV shows for demographics that were not part of the target audience.
- The 30 second TV ads included all three planning ahead documents. Phase 2 of the campaign will use 15 second TV ads to explain in more detail each of the documents and to give a definition – this will work to educate the community on the purpose of each document.
- Sites that have a clear link to life stages need to be targeted, for example, Yahoo!, which targets NSW parents and children. Better associating target audiences will potentially provide a stronger engagement.
- There is scope to build on the strong results of using editorial content online as well as Electronic Direct Marketing (EDM) where such sensitive issue(s) or detailed topics can be brought to life via real life case studies and generate community discussion.
- Evolving the campaign to shift from awareness to increasing awareness with intention to act may provide increased traction, especially when combined with access to easily downloadable template documents.
- Community education is critical to cement the advertising campaign into tangible action
- Build on research that helps understand what motivates people to plan ahead (impact on their family and sense of control [emotional and practical reasons])
- There is scope to link more effectively with legal community to see if planning ahead appointments have increased in private sector.
- Focus groups identified that Advance Care Directives are not well understood and will be a focus at a later date

### **Potential use of the model**

- Targeted campaigns on specific issues can raise awareness and so are a useful tool in the set of approaches Government can use in changing attitudes. This is most effective when complemented with other tools to convert awareness into changed behaviour.

## Securing your future

### **Highlight project in the Ageing Strategy**

*The Government will develop a community education strategy targeted at people in the middle of their lives regarding the critical decisions they may make that will affect their wellbeing in later life. This will include decisions about work, housing, finance, social connections, health and lifestyle. Key decisions will be mapped against each stage of people's lives. The community education strategy will identify opportunities to influence these decisions, including the best ways to reach people at each point in their lives. The underlying message of the strategy will be that 'ageing well' starts with better planning in the middle of your life.*

### **Purpose**

This highlight project adapted the thinking about 'early intervention' to the domain of ageing. The intention was to find ways of increasing awareness of how ageing is affected by decisions made earlier in life. Better planning would ensure that people lived the best lives that they could and avoided potentially preventable impairments to their well-being.

### **Description**

This project was highly aspirational and did not have a specific change mechanism or target behaviour in mind. Whilst the commitment was to a community education strategy, there was no agreement on the content of that strategy.

The first stages of the project were to clarify what the strategy should target. Staff from FACS consulted with a range of stakeholders, involving two 'peak' groups for each topic, including: ASIC, NSW Fair Trading, NSW Health, Alzheimer's Association, Australian Housing and Urban Research Institute (AHURI), the Commonwealth Department of Employment and Adage Employment (an online employment agency). Based on the consultations, FACS concluded that all these bodies were interested in the kind of work being discussed but nobody had a clear idea about how to target 45-60 year olds. The issue seemed to be that this age reflected a stage of life that was relatively settled, people were generally paying off mortgages and accumulating superannuation and were mostly healthy so were not challenged by health issues. This meant that there were no clear 'hooks' to catch the attention of this group.

FACS then commissioned National Seniors Australia to undertake a literature review to look at issues around decision-making by 45-60 year olds in housing, finance, employment and health. While the literature review (December 2013) suggested possible areas for action, many of these overlapped with existing Government activity (e.g. prevention of Alzheimer's).

In the next stage, COTA was commissioned to undertake a round of focus groups canvassing the same issues. The focus groups found that people generally think more in terms of 'life stages' (e.g. planning for retirement) rather than their specific age group. The focus groups identified four broad sets of people ('mindfuls', 'pragmatists', 'positives', and 'defeatists') and mapped them against two axes – optimistic to pessimistic, and proactive to reactive. The focus groups also helped identify triggers for people to think differently about ageing: health (e.g. a health-related incident); change in work circumstances; change in social connections (e.g. loss of a partner); finances; and housing.

This information was provided to an advertising agency (LOUD), to develop a creative proposal. The proposal submitted by LOUD did not match the directions provided by FACS and so did not proceed. The general approach was to 'drip feed' a series of key messages, rather than a consolidated awareness campaign.

After a lot of activity, it was still not clear (a) who was the target audience, and (b) what it was that the communication Strategy might say. The project has not progressed as at the end of 2014 and will need to be reinvigorated if this remains a priority.

### **Target group**

People aged 50+.

### **Partners**

A wide range of stakeholders provided input, but no specific partner organisation.

### **Outcomes**

No specific outcome achieved.

### **What worked**

- **Better understanding drivers and motivations** – as a result of the research, FACS has some useful evidence about the drivers and motivations of people aged 45 to 60 and of opinions of the broader population as they think about ageing.

### **Lessons learnt**

There are three potential factors which can drive a lack of momentum and all three of these factors were at play in this highlight project:

- **The wrong issue** – whilst the notion of 'better planning' is intrinsically attractive, the project was very broad brush and outlined a scope that was many things to all people. In terms of how it was framed or conceived, it was an idea that was just a sketch that needed to be developed. There were multiple overlapping interests and without a clear focus it was difficult to identify where this project could make a difference.
- **The wrong time** – it is possible that there was not an available window to promote this issue. Circumstances and context often determine what is possible e.g. a natural crisis (bushfire or flood) can lead to major changes in emergency response management. There was nothing during this period that highlighted the need for people in their middle years to improve their planning for later life and there were some potential barriers (e.g. complexity of superannuation rules).
- **Not implemented appropriately** – this was just one of 12 highlight projects, and of those 12, six had immediate demands to get activity up and running (e.g. establish the NSW Elder Abuse Helpline; roll-out Tech Savvy Seniors Training). To some degree, this project may have been put on the backburner and so did not receive the attention that it needed to give it shape and momentum. This was a difficult but important issue to tackle and it is possible

that FACS could have approached this project with a different frame and delivered a better result.

Other lessons arising from this project:

- **Potential partners** – some targeting of partnerships would have been possible e.g. NSW Fair Trading has a community outreach program targeting financial literacy and related issues, particularly for low income earners such as residents in residential parks (formerly caravan parks).

**Potential use of the model**

- There is no specific model or mechanism developed as part of this project.

## Public-private partnerships for population ageing

### **Highlight project in the Ageing Strategy**

*The Government will establish an open dialogue with the private sector to maximise the commercial opportunities resulting from an ageing population. The work will commence with a private sector and social investment partnership forum to identify areas of action in key industry segments, which will in turn inform the development of specific industry action plans. This initiative will also explore opportunities for social investment, using the expertise of the private and non-government sectors to improve social outcomes.*

### **Purpose**

This was included in the NSW Ageing Strategy for two reasons:

- there are genuine opportunities that arise from the change in demographics that are occurring and these could be harnessed in beneficial ways
- the private sector could be an effective partner and increase the leverage of Government investment.

### **Description**

FACS convened a one-day forum at Parliament House in October 2012 called *'Business, Boomers and Beyond: the economic opportunities of population ageing'*. There were sixty attendees from a range of businesses, peak bodies and other industry experts. The agenda included a presentation from Bernard Salt, a demographer and partner at KPMG plus facilitated group discussion focused on different industry sectors. The outputs of the forum were fed into the review of NSW Industry Development Plans which are facilitated by the Department of Trade and Investment. The forum did not generate any specific partnerships.

Following the forum, exploration of opportunities to collaborate with the private sector was limited to consideration in the context of the other highlight projects. As outlined in the summaries of other highlight projects, three private sector collaborations emerged:

- Partnership with Telstra on Tech Savvy Seniors
- Partnership with the GAP Taskforce on approaches to employment for older people
- Publication of an industry magazine jointly with the Urban Taskforce on population ageing and housing developments.

The NSW Ageing Strategy Interdepartmental Committee included a representative from the private sector (the current chair of Macquarie Bank). He attended a limited number of meetings and did not contribute to any of the project steering committees or working groups with the result that his nomination to the Committee has not fostered any additional links.

It is worth noting that, in parallel with this highlight commitment, the NSW Premier established the *'Innovation Initiative'* announced in August 2014. This is an open invitation to the private and non-Government sectors to submit innovative approaches in four areas: social housing; open data; congestion and 'open ideas', identifying both the policy challenge and proposed solution. Proposals for three of the four areas were due in late 2014 (with proposals for social housing initiatives due in

January 2015). It is not apparent if the *Innovation Initiative* had any bearing on this commitment in the Ageing Strategy other than that with its release, the carriage of developing private sector relationships may have passed to the Department of Premier's and Cabinet.

### **Target group**

No specific target group of service users.

### **Partners**

- NSW Trade & Investment
- Telstra
- GAP
- Urban Taskforce

### **Outcomes**

The openness to collaboration (and promotion of collaboration by the Minister) may have been a factor in enabling the partnerships with Telstra and GAP. This created a context where it was possible for public sector agencies to respond positively to approaches from the private sector that may have otherwise been rejected.

The outcomes of the Telstra partnership are outlined under Tech Savvy Seniors. The GAP Taskforce is still in the development phase.

There is no evidence that a new partnership developed as a result of an approach from Government to the private sector, although relationships have been developed that could lead to some form of partnership in the future (e.g. in housing).

### **What worked**

- **Openness to partnerships** – the inclusion of a focus on partnerships with the private sector effectively created 'permission' for these relationships to develop. As noted, this may have made it possible for FACS to be more open to the approach from Telstra than may otherwise have been the case. This strengthened the culture and approach of FACS in dealing with the private sector.

### **Key lessons**

- **Target partners** – corporate entities have some common interests and shared goals with government e.g. improving people's lifestyles by encouraging people to move more and eat well is a common goal of governments, life insurers, private medical insurers, the fitness industry and some parts of the food industry. Identifying these overlaps and potential partners and actively targeting activities where those interests intersect is an important step.
- **Learning to ask/making the first contact** – Kathryn Greiner, MACA Chair, played a valuable role in championing links between Government and the private sector and indicated that it was important for Government to be willing to ask the private sector what it could do. There may not be an immediate opportunity at the first approach, but seeding a range of

potential projects could lead to a small number of actual projects. This 'entrepreneurial' spirit is not typically in the skill set of public sector agencies, nor may it be valued. This suggests that there may need to be a cultural shift to enable this to occur.

- **Different types of relationships** – the nature of partnerships with the private sector requires an approach that may not be well practiced within Government and raises potential risks around influence and exploitation that need to be carefully managed.

#### **Potential use of the model**

- There is no particular model that was developed as part of this highlight project, rather it produced a cultural shift in a willingness to say 'yes' to approaches from the private sector.

## Age-friendly local communities

### **Highlight project in the Ageing Strategy**

*The Government will establish a grants program to help councils meet the needs of an ageing population. These grants will help councils identify local solutions to issues such as the accessibility of town centres, meeting rooms and facilities and maintaining social connectedness. Councils will be required to do this work in partnership with local seniors, businesses and community organisations, and will be encouraged to incorporate this work into their requirements under the Integrated Planning and Reporting Framework.*

### **Purpose**

The NSW Ageing Strategy committed to a grants program to help Local Government to meet the needs of an ageing population. This became the Age Friendly Community Local Government Grants Scheme (AFCLGGS).

The objectives of the Grant Scheme were to help local councils:

- plan for population ageing
- incorporate ageing objectives into their Community Strategic Plans, Resourcing Strategies, Delivery Programs and Operational Plans
- identify and implement local solutions to create age friendly local places including: contributing towards the installation of ramps, signage, seating, footpaths, accessible toilets, lighting, and age friendly exercise equipment
- improve the accessibility of community facilities so as to increase their utilisation by older people
- develop a whole of council approach to population ageing
- work in partnership with local stakeholders to achieve these objectives
- lever support from other funding sources.

The inclusion of the grants scheme as a highlight project recognised the role of Local Government as a key partner in ageing with responsibilities for many activities that impact on older people (provision of local services, land use planning, community programs). Whilst the immediate activity was providing grants, the higher level aim was to raise Councils' awareness of ageing so that Councils would be better placed to manage ageing issues into the future.

### **Description**

A Steering Committee was set up by Local Government NSW (LGNSW) to develop the framework for the Scheme, the development of the application process, project aims and objectives, selection criteria, as well as to review applications and identify successful applicants.

LGNSW wrote a letter to all councils in NSW to inform them of the Scheme, emailed networks and advertised it on the LGNSW website. A workshop open to all council staff was held in October 2012. Eighty people attended from 56 councils. Financial support for air travel was provided from the grants funding.

Applications opened on 10 September 2012 and closed on 16 November 2012. The Steering Committee formed an Assessment Team – two representatives from FACS, one from Office of Local Government and two from LGNSW. 84 applications were received - 55 from rural areas and 29 from metro areas. Six of them were joint applications from two councils. The majority of applications were for projects to develop ageing plans or implement specific ageing projects:

- Planning: Strategy, Pedestrian Access Mobility Plans (PAMPS), access audits
- Implementation: Access, recreation equipment, information.

A total of 26 grants were allocated, 20 to rural councils (one joint project) and nine to metropolitan councils (two joint projects). Due to the large number of applications, the assessment team decided to reduce the amount for each project from the maximum amount of \$25,000 to \$21,500 (or the amount requested if less) for individual council projects. All but one applicant offered the funding accepted the reduced amount. For joint projects the maximum was reduced from \$60,000 to \$42,000. Two councils that had applied for a joint amount of \$60,000 were offered and declined the lesser amount of \$42,000. This funding was subsequently accepted by another joint project.

### **Integrated Age-Friendly Toolkit for Local Government in NSW**

The COTA Liveable Communities steering group identified the need to provide some specific resources for councils to facilitate their planning for an ageing population. In particular, to ensure alignment with the Integrated Planning and Reporting processes of councils.

The Toolkit was established following the ideas of a group of interested stakeholders -COTA NSW, University of NSW, FACS, and Ryde Council. The intention was for the Toolkit to be a common resource tool that could be used by councils and fit into broader guidelines.

### **Target group**

The Grants Scheme was targeted at local governments in metropolitan, regional, and rural NSW.

### **Partners**

- Local Government NSW
- Office for Local Government

### **Outcomes**

The 26 projects were funded and delivered. The funded projects were in four broad groups: ageing strategies (10), access (9), recreation (6) and pedestrian plans (1).

For the councils that received funding, the objectives of the Grants Scheme were met within the scope of each individual project:

**Table C3: Local Government Age Friendly Community Grants - Outcomes**

Objective	Result
Plan for population ageing	<ul style="list-style-type: none"> <li>All projects funded responded to the needs of ageing populations in their areas.</li> </ul>
Incorporate ageing objectives into local council's Community Strategic Plans, Resourcing Strategies, Delivery Programs and Operational Plans	<ul style="list-style-type: none"> <li>10 councils developed Ageing Strategies, some of which may have been integrated in to their broader planning framework such as Community Strategic Plans.</li> </ul>
Identify and implement local solutions to create age friendly local places	<ul style="list-style-type: none"> <li>The projects incorporated a high level of consultation with older residents and local stakeholders to produce outcomes that increased the age-friendly nature of Local Government areas.</li> </ul>
Improve the accessibility of community facilities so as to increase their utilisation by older people	<ul style="list-style-type: none"> <li>For those projects that were aimed at increasing access to community facilities by older people, the councils reported a resulting increase in the use of parks, community centres and shopping precincts.</li> <li>It is anticipated that older people's access to community facilities will increase in the future in those councils that developed an ageing Strategy.</li> </ul>
Develop a whole of council approach to population ageing	<ul style="list-style-type: none"> <li>Many projects involved staff from a range of council departments working together to deliver projects. A regional approach to ageing was demonstrated in those areas where two councils joined together on a project.</li> </ul>
Work in partnership with local stakeholders to achieve the objectives	<ul style="list-style-type: none"> <li>Project acquittal reports demonstrated that local stakeholders played an integral role in delivering positive outcomes. This included:                             <ul style="list-style-type: none"> <li>consultation with Residential Age Care providers</li> <li>consultation with Home and Community Care services</li> <li>membership on Steering Committees</li> <li>provision of expert health advice from; an exercise physiologist; a public health student; Local Health District representatives.</li> </ul> </li> </ul>
Lever support from other funding sources	<ul style="list-style-type: none"> <li>Councils accessed a range of in-kind support from local stakeholders, consumer groups and residents, such as tradespeople offering discounted rates, council supplementing funding, and donations.</li> </ul>

Forty-one local councils responded to a survey for this evaluation (27% response rate). Twenty-four of the 41 had applied for an Age Friendly Community Grant and 15 of those had been successful.

The key findings of the survey were:

- 69% rated the importance of ageing as 7 or higher on a scale of 1 (least important) to 10 (most important)

Of the 26 Councils that received a grant:

- 13 (50%) respondents indicated that their council was very likely or extremely likely to do more around ageing as a result of success in the grants scheme

- 12 (46%) indicated that the project had raised the profile of ageing in Council ‘a lot’ or ‘a little’
- 11 (42%) made additional financial contributions to the project to supplement the funding from the program
- 8 (31%) reported that they had undertaken additional actions or initiatives (e.g. one Council applied for recognition as an age-friendly community from the World Health Organisation)

Seven Councils that were unsuccessful in their bid for a grant proceeded to implement some or all of the proposal that they submitted in the grant application.

### Cost (\$ and in-kind)

AFCLGGS was funded by FACS. The funds were administered by LGNSW.

The funding for the grants consisted of two components:

- \$603,000 for distribution to councils in NSW; and
- \$47,000 to be used by LGNSW for expenses including, but not limited to, salaries, promotional and administrative costs - the initial workshop (\$12,000), development of the Toolkit for Councils (\$15,000), administration costs (\$5,000). \$8,000 was subsequently transferred to a Creative Ageing grants program in 2014.

### What worked

- **Partnership with LG NSW** – FACS and LG NSW worked very effectively together in designing a program and rolling it out. This was partly helped by the FACS team member having previously worked in local government so they understood the needs and drivers of local councils.
- **Workshop** – LG NSW organised a workshop on ageing issues, including a presentation on the grants program, which was attended by 80 people from a range of organisations including 56 councils. This workshop probably contributed to a high application rate for the grants.
- **Leverage** – some Councils report having contributed additional resources to the grants project

### Lessons learned

- **Acquittal** - Councils were asked to prepare an acquittal report at the end of the project. There was no prescribed template for the report, resulting in varying in degrees of quality and depth in the reporting of the projects. Any such grants scheme in the future should provide more direction to successful applicants, preferably at the commencement of their project so they are aware of what criteria they need to report on.
- **Evaluation** - Grant recipients should be asked to provide evidence of their evaluation process and its outcomes in final report.
- **Example projects** – the aspiration of the project was to encourage Councils to innovate. However the grant application form included examples of projects with the unintended

consequence that applications largely followed the example projects and did not propose anything new i.e. the examples became de facto guidelines.

- **Barriers to applying** - Some councils may not have applied for the funding for various reasons, including: the amount available per project was relatively small; councils did not have the resources available to write an application or manage the implementation of the project; or the councils did not prioritise ageing.
- **Overall impact** – it is difficult to measure the long-term impact of the grants scheme in raising the overall awareness and prioritising of ageing issues in a local community, although grant recipients surveyed have reported an increase in awareness both within Council and their local communities.

#### **Potential use of the model**

- Grants programs can be very effective in the right context or when targeting the right issue. Local councils are willing to engage in new areas of work where there is funding available and may be willing to supplement that funding with existing resources if the issue is sufficiently important to the Council.

## Housing choices

### **Highlight project in the Ageing Strategy**

*The Government will support greater housing choices for the next generation of older people by improving information sharing on the future housing needs of an ageing population, and monitoring the impact of existing planning schemes. This will include monitoring the supply of specific housing option such as retirement villages and other living options for seniors; affordable housing; well-located housing close to town centres and transport; and the uptake of a universal housing design that improves the safety of housing for older people.*

### **Purpose**

Housing is a critical issue for older people. Physical and financial well-being are linked closely to access to housing. Within the greater Sydney region, the lack of affordable housing is already a significant concern and the number of older people in housing stress is forecast to increase.

The focus of the highlight project was to improve information sharing on future housing needs and monitor the impact of planning systems, including the uptake of a 'universal' housing design to support the ability of older people to stay in their homes as they age (e.g. doors that are wide enough for wheelchairs; bathrooms that can be easily modified).

### **Description**

The commitments around Housing Choices in the Strategy are relatively modest, reflecting that this was included as another 'hook' as a means of raising the profile of the issue.

The context is important for any discussion about housing. Local economic conditions mean that housing in Sydney (and to some extent other parts of NSW) is becoming less affordable. There are multiple factors driving this in a complex interrelated web of Government and personal decisions.

The NSW Government had also proposed significant reform of the planning system, which included changes to major planning instruments (e.g. State Environmental Planning Policy 5, which relates to housing for older people). The new Sydney Metro Strategy was framed around the revised planning system. The proposed reforms were considered by Parliament but did not pass the Legislative Council.

Within this process, FACS played a role in raising awareness of ageing within the broad conversation of planning reform. FACS staff described their role as 'agitating' for change. This involved undertaking research on options and approaches and building relationships with key partners.

Much of FACS's work in this process is not outcome-based, in that it involved attending meetings, providing information and commenting on proposals or issues papers. It is also difficult to demonstrate where that input has been influential – staff of the Department of Planning report that they regarded FACS as both experts and partners and a useful conduit to a key constituency in housing. However, there is no material output to be able to show where the influence resulted in changes or different policy settings.

With regard to liveable communities and universal design, FACS was to promote these principles in the policy discussions and work with different sectors to raise awareness.

This was actioned, for example, by FACS organising a site tour (a one day bus tour) with property developers to show examples of universal design and affordable housing to demonstrate how these principles could be turned into live projects.

Stakeholders in the housing sector indicated that they supported the Ageing Strategy in that the Strategy was setting out a positive direction for housing, but that the implementation of the Strategy had not lived up to those initial expectations.

### **Target group**

Older people – the initiative was not specifically targeted, and was included under the heading of ‘population ageing’.

### **Partners**

- NSW Planning – as the lead agency for the Metro Strategy, the Department of Planning has carriage many of the levers that relate to housing supply
- NSW Housing – Housing plays a lead role in promoting affordable housing.

### **Outcomes**

As discussed, the tangible outcomes of this project are limited, largely because proposed reforms to the NSW planning system and the Sydney Metro Strategy have not progressed through Parliament.

Two small changes have occurred:

- Older people qualify for a \$5,000 grant if buying new property
- Older people are not required to pay stamp duty on the purchase of a newly constructed property if they are downsizing.

The stimulus for these policy changes is unclear and is unlikely to be linked to the Ageing Strategy or the work of FACS.

### **What worked**

- **Developing relationships** - FACS staff successfully developed relationships with key partners. The approach to working with key agencies (Planning and Housing) was characterised as:
  - look for common interest (e.g. for housing, issues around density and liveability)
  - get to know your industry drivers and barriers
  - use data to back up arguments
  - be clear on roles (i.e. if working with junior staff, recognise that they are not decision makers)
  - listen to other agencies’ perspectives.

### **Lessons learnt**

- **Buy in of lead agencies** – it was not possible for FACS to be the lead for this highlight project as the major levers and controls are the responsibility of other agencies. However, there

was no clear lead for this project and given the limited time available in the development of the Strategy, it was not possible to negotiate a specific commitment and generate the buy-in of those agencies. Without that clear direction, this project became a 'hook' with FACS's role to try to influence those agencies to take action. This reinforces the learning that without the buy-in of the lead players at the beginning, the task becomes one of influence and raising awareness in order to generate change. The effectiveness of this highlight project needs to be considered within that context.

- **Clearer focus** – this highlight project did not have a clear target or objective (reflecting the context as discussed above). Recent reports indicate that the most vulnerable older people are those who are: living alone; renting in the private rental market; or are on fixed incomes (e.g. pensions) and those who meet all three of those characteristics are the most vulnerable. Given the complexity of the housing debate, this project would have been assisted by a clearer focus on providing support for these target groups. For example, a research project which identified the number of older people now in NSW that match those criteria and the forecast number over the next 25 years could be used to inform the policy discussions around older people and housing. This is not to detract from messages about liveable communities and universal design, but to complement them with concrete issues to focus the debate.
- **Complexity of policy processes** – policy development often involves long and complex processes with multiple stakeholders and multiple decision points. Any policy outcome is also heavily influenced by history, existing legislation, existing organisational roles and the changing context of the time (e.g. economic conditions, complex social factors). It is important for Strategies to be both aspirational and set goals but also to balance this with the realities of what can be achieved within the current context.

## Population ageing in the NSW Government

### **Highlight project in the Ageing Strategy**

*The Government will incorporate into its Cabinet processes consideration of the impact of these new policy decisions on the long-term fiscal position of NSW. The Government will develop a population ageing report card incorporating key indicators of the state's progress in responding to population ageing to inform the development of future actions as the NSW Ageing Strategy is refreshed.*

### **Purpose**

The purpose of this highlight project was to focus attention on processes within the NSW Government and how they could be considered from the perspective of older people.

### **Description**

The activity under this highlight project focused on two major areas: understanding the current spending on older people in NSW; and developing a baseline picture of the NSW population.

- **Understanding Age-Related Expenditure across NSW Government**– NSW Treasury commissioned Price Waterhouse Coopers to compile a summary of the NSW Government's expenditure on people 45 and over. The objective was to provide a baseline estimation of the NSW Government age related expenses for the financial years of 10/11, 11/12 and 12/13. The review developed a detailed breakdown of expenses by five year age groupings.

The key findings were that in 2012/13, age related expenses accounted for approximately 30% (\$18.4bn) of NSW's total government expenses. Age related expenses grew by 8.8% from 10/11, mostly due to increases in Health and Transport. The agency clusters with the highest proportion of age related expenses were Health (52%), Transport (19%), Attorney Generals (12%) and Family & Community Services (7%).

The review method broke expenditure into three funding groups: age specific, direct mainstream and indirect mainstream. The majority of expenditure was in the 'direct mainstream' category, e.g. health expenditure, where mainstream funding programs deliver services to older people.

The age-related expenditure report was not anticipated at the time of the Ageing Strategy and emerged from discussions at the IDC. The report is a positive output of the involvement of NSW Treasury in the IDC and the FACS team indicated it was a result of a good relationship between FACS and Treasury and a shared awareness of the importance of the issue of ageing.

- **Population Ageing Report Card** – FACS engaged an external consultant to develop a baseline report on the state of ageing people in NSW. The output of the project was a comprehensive list of the data that could be used to populate the report card – it was a directory of data sources, rather than a first report of the data which had been expected by FACS as the output of the project. Nevertheless, it provides the basis for preparing a report on population ageing as all key data sources are identified. The output does not fulfil the

commitment made in the Ageing Strategy. After the completion of the data 'directory' in early 2014, the project stalled as it was not clear how to progress the project to the next step. FACS subsequently approached FACSAR (the research unit within FACS) who did not have the resources to complete the task. As of late 2014, the Demography Unit in the Department of Planning agreed to populate the data sets and a project plan was being developed.

### Target group

- No specific target group of service users

### Partners

- Treasury (*Understanding Age Related Expenditure across NSW Government*)

### Outcomes

This commitment was related to government process and improvements in the inputs into government decision making: as a result, it did not involve delivering outcomes directly to older people. It has partly achieved the aim of improving awareness and information sharing within the NSW Government.

- ***Understanding Age-related expenditure across NSW Government report*** - Stakeholders indicated that the report was extremely valuable, particularly for NSW Government agencies and raised their awareness of their own agency commitment to ageing. Stakeholders also noted that the largest expenditure areas were in health (particularly in the last years of life) and in transport concessions. One NGO stakeholder disputed the methodology and suggested that the transport concession figures were an economic construct and not reflective of a real expenditure. There is significant interest amongst all stakeholders around end-of-life issues and developing more appropriate approaches to providing end-of-life care.
- **Population Ageing Report Card** – no outcome from the project. The output goes part way to fulfilling the commitment but is incomplete.

### Potential use of the model

- The age-related expenditure report provided a valuable insight into Government expenditure patterns. It could be a valuable complement to other reports by Government on ageing so may be worth replicating periodically (e.g. every 4 years). It is also a model that could be applied to other population groups (e.g. young people; women; people from culturally and linguistically diverse backgrounds) to provide a base for policy discussions about priorities and gaps.

## Appendix C – Sub-evaluations

The methodology for the evaluation of the NSW Ageing Strategy proposed that WestWood Spice would undertake more detailed evaluations of two specific projects. It was suggested that these be:

- ‘Tackling abuse’ to test the effectiveness of the NSW Elder Abuse Helpline and Resource Unit (EAHRU) in providing practical information, advice and referrals to prevent or stop abuse of older people
- ‘Get it in Black & White’ to assess the effectiveness of targeting the middle years population cohort and the extent to which behaviour change was achieved.

In the event, it transpired that significant evaluation work had already been undertaken with respect to the ‘Get it in Black & White’ campaign and so the Local Government Grants Scheme was substituted.

The suggestion that a further two project evaluations be undertaken internally as part of the evaluation capacity building of the FACS team proved impractical, both in terms of staff availability and time constraints.

### *Tackling Abuse*

A descriptive overview of the NSW Elder Abuse Helpline and Resource Unit (EAHRU) can be found in the individual project summaries at Appendix B.

As with the other exemplar projects, a range of interviews were held with key informants involved with the NSW Elder Abuse Helpline and Resource Unit. These included EAHRU staff, service partners such as the police and steering committee members.

There was strong support for the Helpline and the positive impacts which it had achieved. A particular strength was the good working relationship which had developed with police with a single point of contact on both sides, leading to a strong partnership. This has been the catalyst for increasing education amongst both the police and the community, as well as enabling increased awareness by the police about specific cases of abuse. For example, in the case of financial abuse, the vast majority of cases involve a family member, creating a reluctance to bring this to the attention of the police because of fear that the older person may lose carer support. The Helpline means there is an independent party which can be involved; calls to the Helpline where it is a police matter usually then result in the caller contacting the police.

There was commentary that the current scale of support is small and there are untapped areas which could benefit from much broader promotion. For example, bank tellers and the whole financial services sector could benefit from greater understanding about financial abuse.

Stakeholders welcomed the recently released NSW framework for addressing and preventing abuse ‘*Preventing and responding to abuse of older people NSW interagency policy 2014*’ and the associated resources developed by the EAHRU to assist services to review their own policies. However, it was a source of dissatisfaction that there had been a long delay between the sign off of the policy by the IDC and its release.

Table A1 below details the additional sources of primary data and research questions which were explored in the Elder Abuse evaluation in addition to the stakeholder interviews.

**Table A1: Additional sources of primary data and research questions**

Topic	Research question/s	Data source
Geographic coverage	To what extent has the NSW Elder Abuse Helpline provided information and support across the state of NSW?	Analysis of all available postcodes (n=1,790) in respect of callers to the helpline since commencement.
Caller satisfaction and helpline impact	<ul style="list-style-type: none"> <li>▪ How do callers find out about the Helpline?</li> <li>▪ Why do people call the Helpline?</li> <li>▪ How many calls does it take to resolve an issue?</li> <li>▪ How is the quality of Helpline staff rated?</li> <li>▪ Are callers satisfied with the support/information which they receive?</li> <li>▪ What impact has contact with the Helpline had on callers in dealing with elder abuse?</li> </ul>	Online survey completed by callers to the helpline (professional and family members/carers only)
Participant satisfaction (information presentations)	<ul style="list-style-type: none"> <li>▪ How relevant and useful did participants find the information presentation?</li> <li>▪ What future training needs have been identified?</li> </ul>	Feedback sheets from a sample of 20 x 2014 presentations (321 participants)

### ***Geographic coverage of helpline***

The NSW Elder Abuse Helpline and Resource Unit is a state-wide service. There are a number of initiatives taken by EAHRU to assist with achieving state-wide coverage. These include the conduct of awareness and information sessions in diverse geographic locations across NSW (see sample coverage in Table A2) and the development of regionally based collaboratives (discussed later in this section).

In order to test the geographic coverage of the Helpline, the evaluation undertook an analysis of postcode data, where this was available, across all calls since the establishment of the Helpline. This represented 1,790 of the total of 2113 calls to December 2014 or 85%.

Postcodes were collated then manually matched to current Local Health Districts. Results of this analysis are shown in Table A2 below and presented pictorially in the maps which follow. A new call logging system planned for the Helpline in the future will automatically create this categorisation. This will allow for future refinement of targeting of education and awareness sessions. In assessing the region penetration of the Helpline, it should be kept in mind that there are some areas of the state which have a higher proportion of older people in the population e.g. the Central Coast, the Far North Coast. Also generally the age profile in regional areas is older than for metropolitan Sydney. Overall, 36% of calls came from rural and regional areas and 64% from greater metropolitan Sydney.

This matches exactly the June 2013 ABS data which shows that 64% of the NSW population live in Greater Sydney.<sup>9</sup>

**Table A2: Helpline callers x local health district**

Metro/Rural	Local health district (LHD)	# callers	%
<b>Rural and regional</b>			
	Far West	2	0.1%
	Hunter New England	247	13.7%
	Mid North Coast	66	3.7%
	Murrumbidgee	57	3.2%
	Northern NSW	97	5.4%
	Southern NSW	73	4%
	Western NSW	100	5.5%
<b>Proportion of rural and regional calls</b>		<b>642</b>	<b>36%</b>
<b>Metropolitan</b>			
	Central Coast	126	7%
	Illawarra Shoalhaven	101	5.6%
	Nepean Blue Mountains	88	4.9%
	Northern Sydney	221	12.3%
	South Eastern Sydney	181	10%
	South Western Sydney	153	8.5%
	Sydney	139	7.7%
	Western Sydney	152	8.4%
<b>Proportion of metropolitan calls</b>		<b>1,148</b>	<b>64%</b>
<b>Total callers</b>		<b>1790</b>	<b>100%</b>

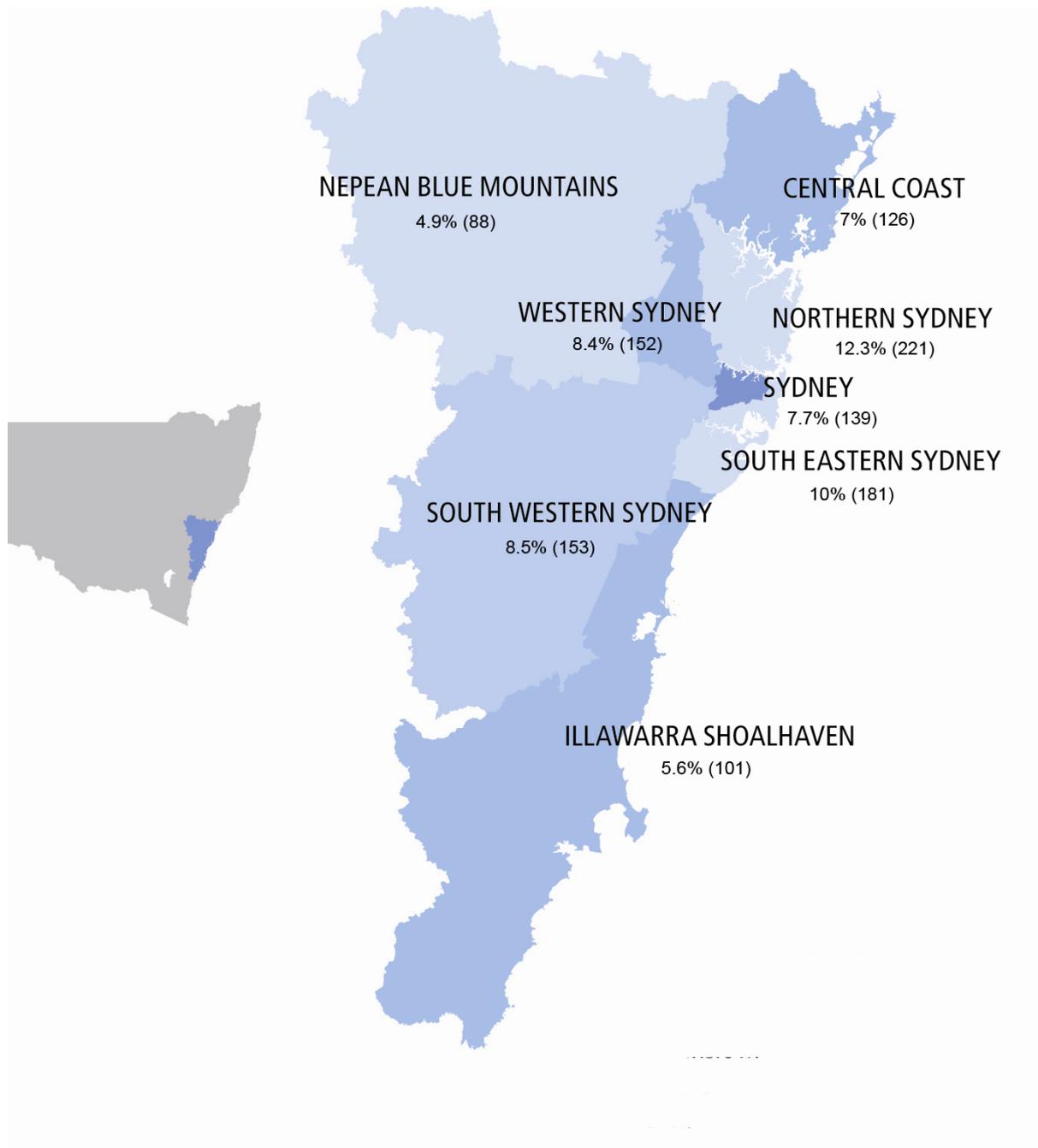
<sup>9</sup>

<http://www.abs.gov.au/ausstats/abs@.nsf/Latestproducts/3235.0Main%20Features22013?opendocument&tabname=Summary&prodno=3235.0&issue=2013&num=&view=>

Figure A1: Distribution of rural and regional callers to the elder abuse helpline



Figure A2: Distribution of metropolitan callers to the Elder Abuse helpline



### Caller satisfaction and helpline impact

Although calls to the Helpline are anonymous, callers are given a call reference number. Where appropriate, a caller's contact details, if supplied, can be linked to this reference number. Through this mechanism a sample of callers (professionals and family members/carers) to the Helpline were invited to participate in an online survey conducted independently by the evaluation. In order to comply with privacy protocols, the mechanism used to access a sample of callers was as follows:

- A volunteer at the EAHRU initiated a call to a previous caller and invited them to participate in the survey.
- Where the caller agreed to participate, the volunteer took their email contact details and forwarded a cover email from the EAHRU Senior Coordinator which contained the survey link. The email from the Helpline made it clear that survey responses would be returned directly to Westwood Spice.
- Data was collected on the number of invitations issued (phone calls made) and the numbers of people who agreed to receive the survey link or who declined to participate.

**Error! Reference source not found.** below shows the actual invitation numbers and acceptance rate. Almost all those called (95%) agreed to receive an invitation to the on-line survey link. Of these in turn, more than half (54%) completed the on-line survey. This is a strong response rate.

**Table A3: Survey invitations and acceptance rate**

Callers invited to participate	# Callers accepting	# Completed surveys
55	52	28
Acceptance rate:	95%	54% of those accepting invitation

The majority of survey responses were received from callers ringing in a professional capacity. (19/28 or 68%). However, 9 callers were ringing as a family member/ carer of the older person.

### Finding out about the NSW Elder Abuse Helpline

The most common method through which respondents had found out about the Elder Abuse Helpline was through the internet. This was especially true of family members and carers where almost half had found out about the Helpline through the internet. Amongst professionals, over one quarter had learnt about the Helpline through their own organisation. **Error! Reference source not found.** below shows the range of ways people found out about the helpline.

**Table A4: Finding out about the helpline**

Method	# ALL Callers	% Callers	Professional callers		Family/carers	
			#	%	#	%
Newspaper advertisement	0	-	#	%	#	%
Helpline brochure	2	7%	2	11%	-	-
Internet search	8	29%	4	21%	4	44%
Attendance at an awareness/education session delivered by Helpline staff	4	14%	3	16%	1	11%
Information provided to me by my organisation	5	18%	5	26%	-	-

NSW Elder Abuse Interagency Policy	2	7%	2	11%	-	-
Other	7	25%	3	16%	4	44%
<b>TOTAL</b>	<b>28</b>	<b>100%</b>	<b>19</b>	<b>100%</b>	<b>9</b>	<b>100%</b>

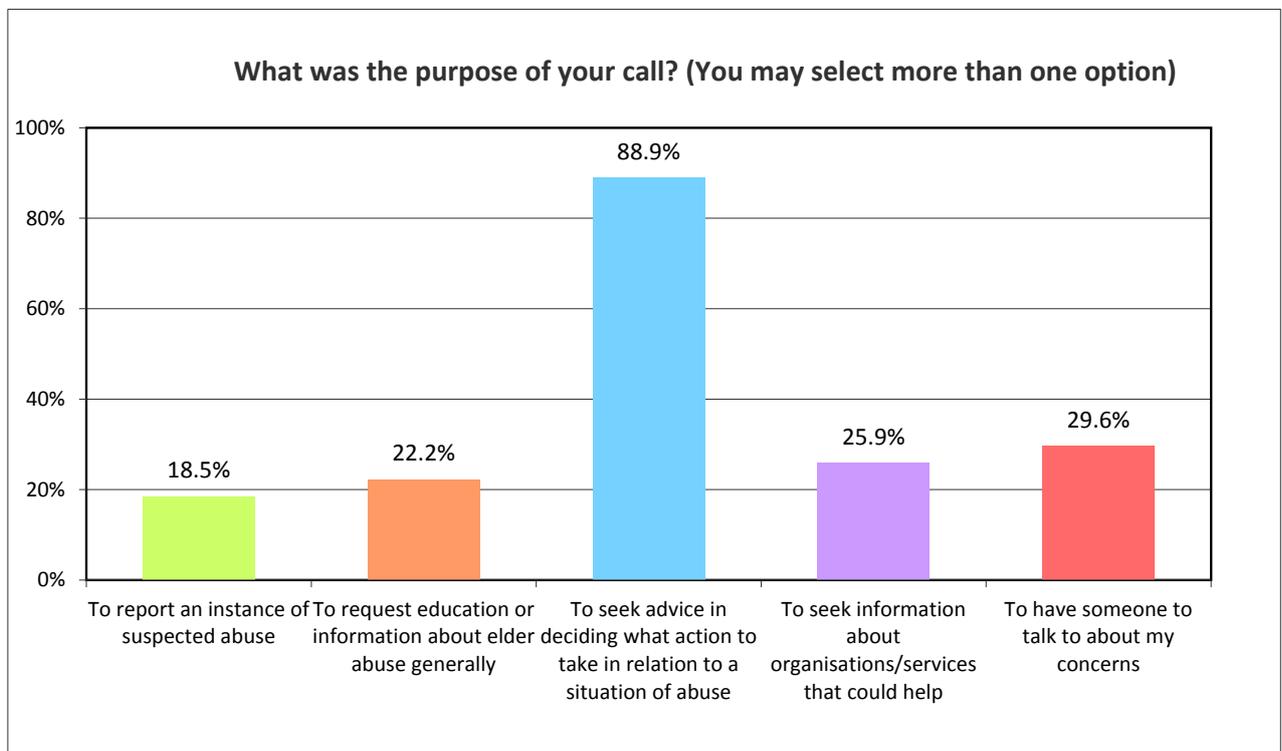
Examples of other ways included through other family members, Local Council, Facebook and previous use of the Helpline.

### Making contact with the NSW Elder Abuse Helpline

The range of reasons why participants had contacted the Helpline are shown in Table A3 below.

Participants were able to nominate more than one reason and on average nominated two reasons. Almost all respondents (24/27) were seeking advice in deciding what action to take in relation to a situation of abuse. The next most common purpose was “to have someone to talk to about my concerns”, nominated by almost a third of respondents (8/27).

Figure A3: Purpose of call to the Helpline

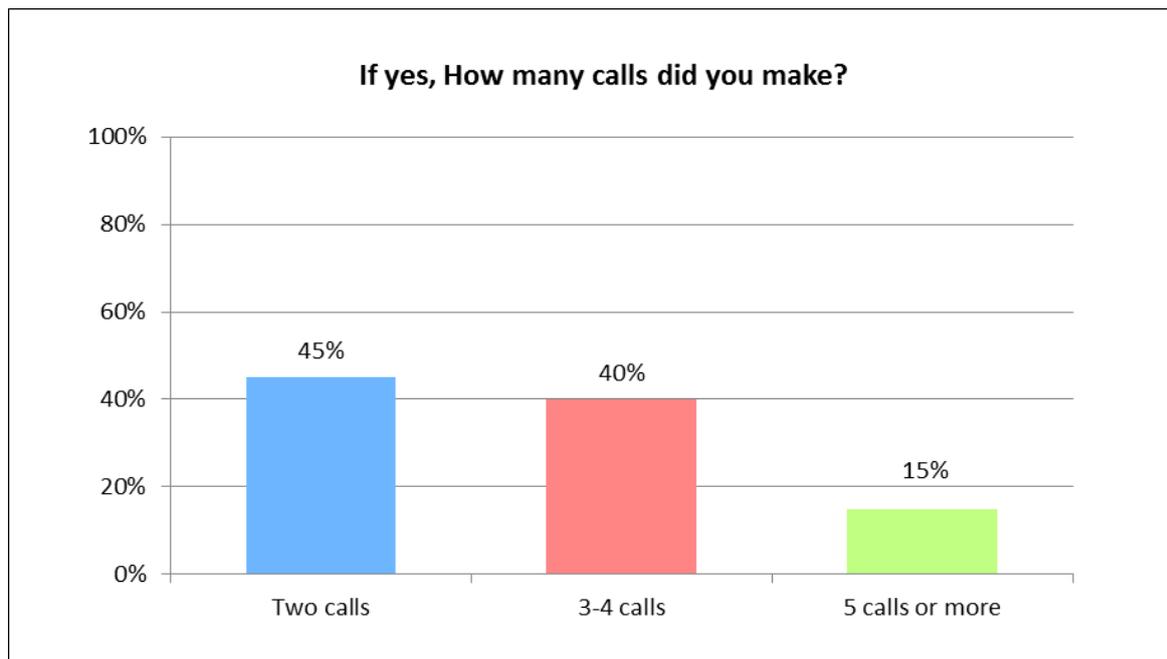


### Number of calls to the Helpline

Three quarters of callers indicated that the complexity of their situation required more than one phone call to be made to the Helpline.

The number of calls made to the Helpline for a particular issue are shown in Table A4 below. Almost half of the issues were able to be resolved with two calls.

**Figure A4: Numbers of calls made to the Helpline per issue**

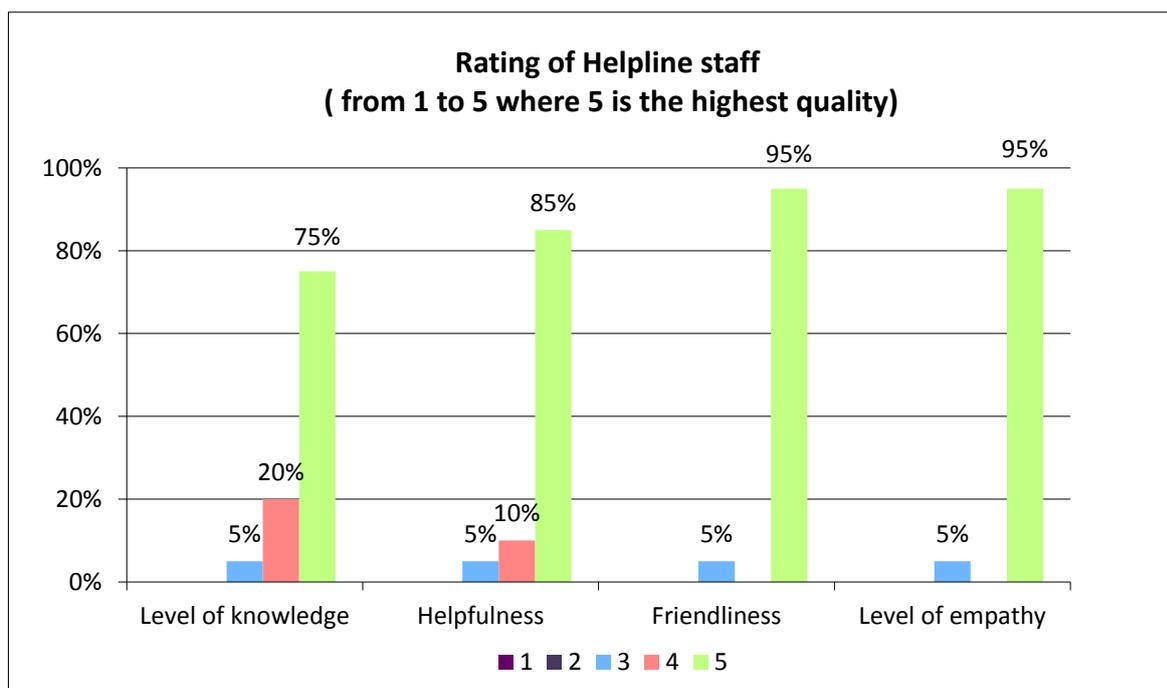


Comments indicated that a number of emails had also been involved and that discussions had been very valuable.

**Quality of NSW Elder Abuse Helpline staff**

Respondents were asked to rate the quality of the Helpline staff on a scale from 1 to 5 (where 5 is the highest quality) across the domains of level of knowledge, helpfulness, friendliness and level of empathy.

**Figure A5: Quality of Helpline staff**

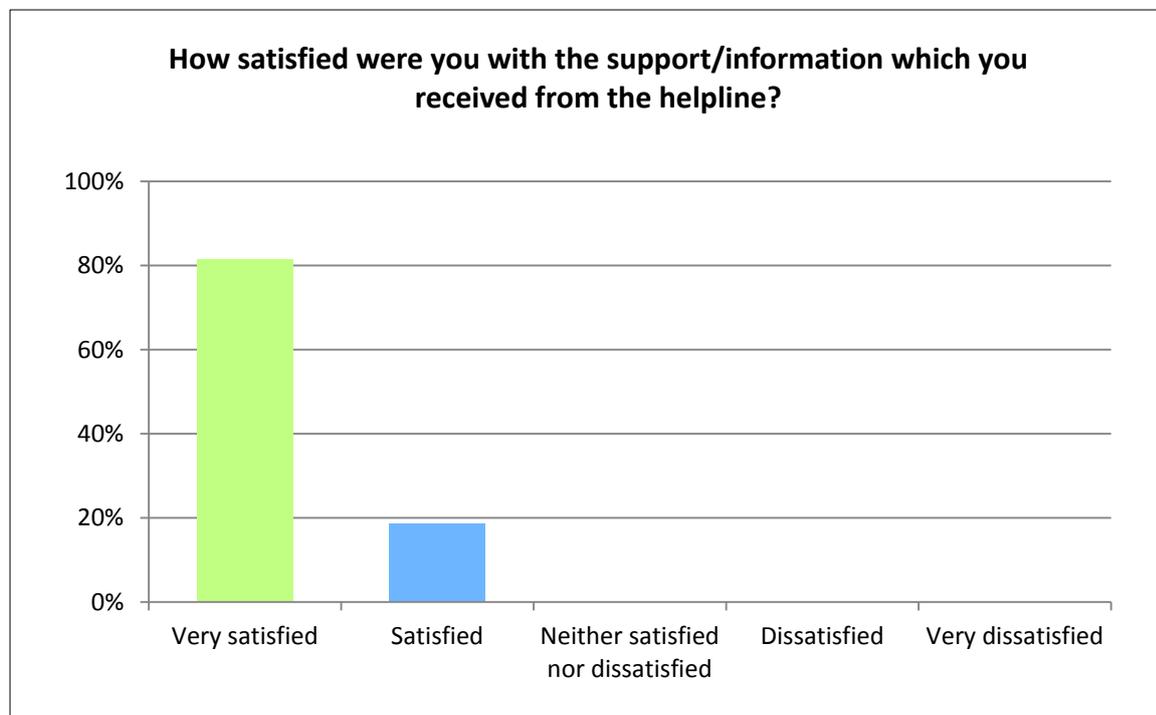


Overall ratings of the Helpline staff were high, with 95% scoring five for both friendliness and level of empathy; 85% rated 5 for helpfulness and 75% rated 5 for level of knowledge.

### Effectiveness of the NSW Elder Abuse Helpline

*Satisfaction with the support/information received from the helpline*

**Figure A6: Satisfaction with support/ information**



Overall there is a high level of satisfaction with the information/support received from the Helpline. 100% of respondents were satisfied or (in 82% of cases) very satisfied.

Comments received indicated that staff were very polite, professional, understanding, patient and helpful and that information included verbal information, emailed information, tools for GPs and advice about police contact.

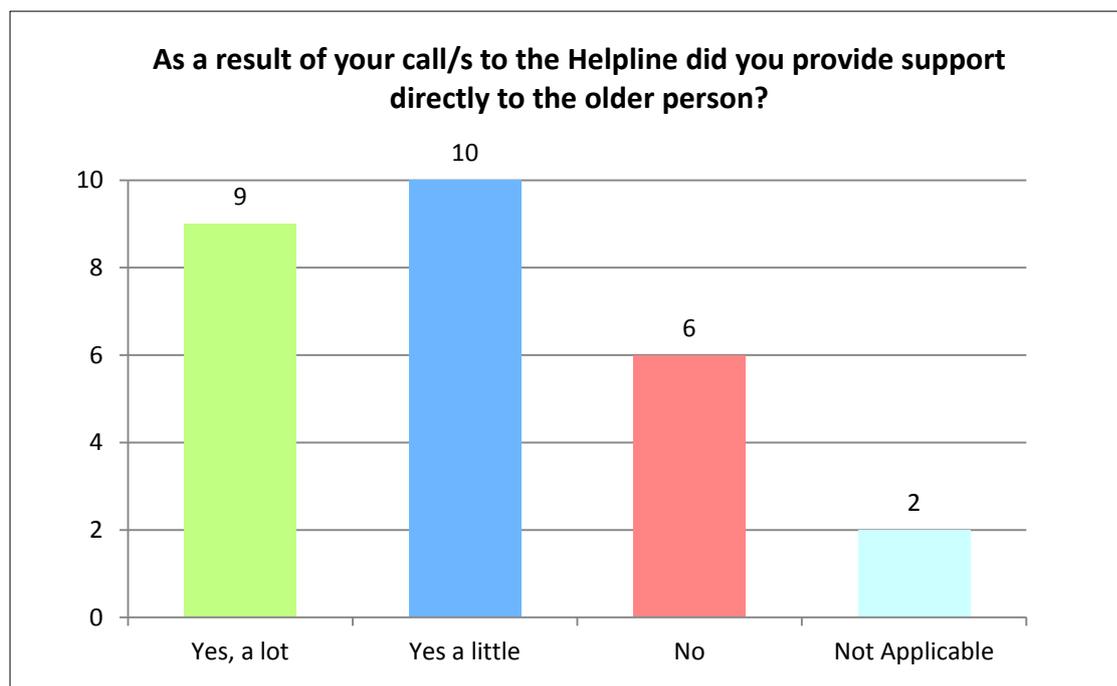
#### *Increased ability to respond to the situation of abuse of an older person*

Eighty-five percent of respondents indicated that their ability to respond to the situation of the abuse of an older person had increased a lot through the information they had been provided. Only three rated their ability as a little or only slightly improved.

#### *Provision of support directly to the older person*

Seventy percent of respondents indicated that as a result of the call to the Helpline they provided support directly to the old person. This was almost equally split between a lot and a little support. Comments included that an elderly person had been protected from financial abuse, that there had been a great outcome, that a GP had become involved and where there had been no contact, that information had been passed on to someone else who would have direct contact with the older person.

**Figure A7: Provision of support directly to the older person**



*Increased ability to identify elder abuse*

Almost one third of respondents indicated that their ability to identify elder abuse had increased a lot as a result of their contact with the Helpline. Another one third of callers already felt confident in the identification of the elder abuse and there was a slight positive impact on the remainder. There was a slightly higher percentage of respondents who use identification abilities had increased a lot amongst the callers who were family members. (38% vs 32%).

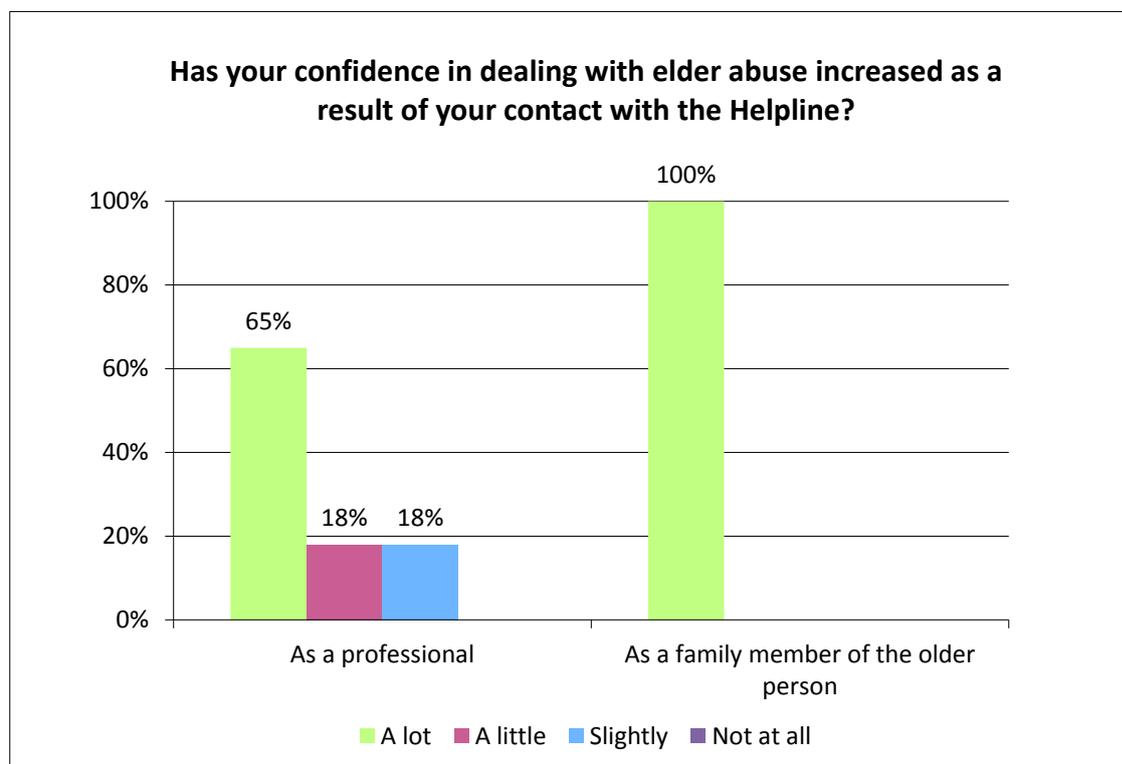
**Table A5: Increased ability to identify elder abuse**

Increased ability to identify elder abuse	# Callers	%
A lot	8	32%
A little	3	12%
Slightly	4	16%
Not at all	1	4%
Not applicable – already confident to identify elder abuse	9	36%
<b>Total responding</b>	<b>25</b>	<b>100%</b>

*Increased confidence in dealing with abuse of an older person*

There was a significant impact on confidence when dealing with elder abuse amongst all the callers, but especially amongst those who were family members. Universally, these latter respondents said their confidence had increased a lot. The comparable figure for professional respondents was 65%.

Figure A8: Confidence in dealing with elder abuse



#### *Most important benefit from contact with the Helpline*

Respondents were asked about the most important benefit from contact with the Helpline. The key theme was the quality of the advice received. Beneficial aspects which were mentioned included:

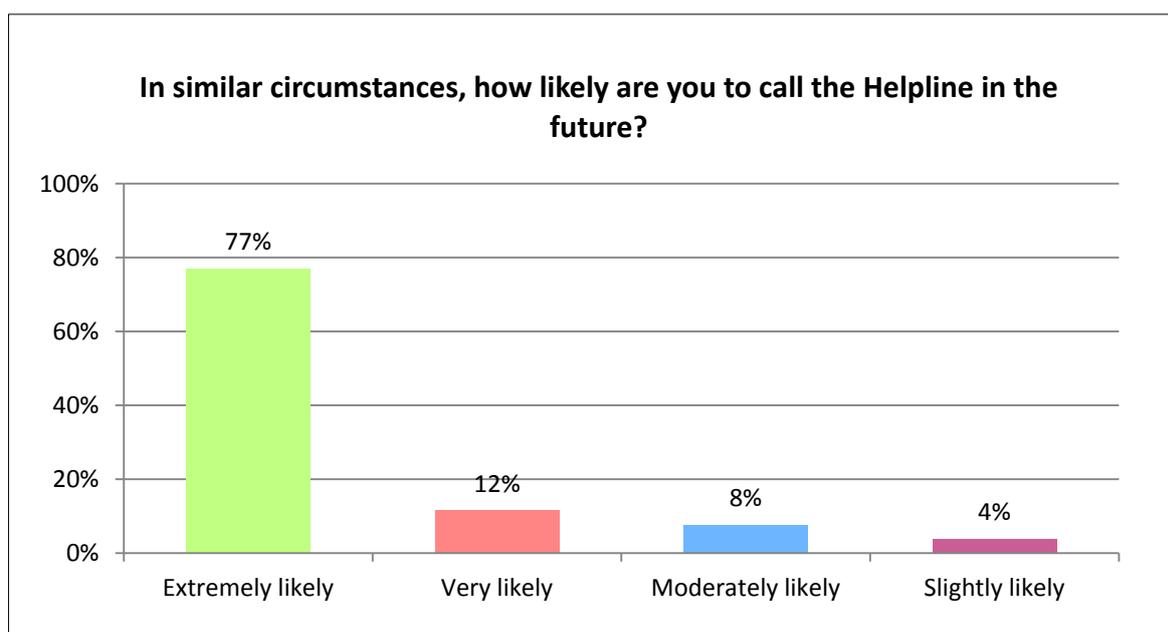
- Good advice being provided one step at a time.
- Information being the most up-to-date
- Confirmation of suspicions of abuse.
- Working through a plan of action

Other themes included the shared support and 'second opinion' which the Helpline provided including being a 'professional non-biased person', the follow-up which the Helpline was able to provide (e.g. speaking to another family member, following up with other professionals) and the outcomes which were achieved for the older person involved.

#### *Increased likelihood to contact the Helpline*

Almost all respondents would call the Helpline in similar circumstances in the future, with 89% being very likely or extremely likely to do so.

**Figure A9: Likely to contact the Helpline in the future**



#### *Suggestions for improvement*

There were many comments indicating a high degree of satisfaction with the Helpline with no need for improvement e.g. 'none', 'the services are brilliant', 'very good service', 'you cannot improve on perfection'.

A number of constructive suggestions were made. These included:

- more information/ content on the web page
- an email enquiries option
- an ongoing media awareness campaign for the general public
- development of an app for smart phones
- offering 'higher level' training for already experienced workers

#### ***Participant satisfaction (Education and information presentations)***

Education and awareness presentations are organised both proactively and in response to requests. In 2014, 70 presentations were conducted covering both metropolitan and regional NSW. Since its inception, the EAHRU has averaged more than one presentation every week.

A sample of 20 of the 2014 presentations showed that on average 42 people attended.

Awareness presentations are generally of 30 – 45 minutes duration and cover basic indicators, the types of abuse and information about the operation of the Helpline. Education presentations are longer (typically three hour's duration). Content is structured to the educational levels/needs of the audience e.g. care workers, allied health professionals. Content includes the different forms of abuse of older people, signs and risk factors, how to manage responses to incidents reported by staff and

volunteers, discussion of current practice, the role of the NSW Elder Abuse Helpline and Resource Unit, and the NSW Interagency Policy for responding to abuse of older people.

At the conclusion of the longer information sessions, participants are invited to complete a simple feedback sheet. This covers ratings of the presentation in relation to relevance, usefulness and ease of understanding of the information presented, venue and presenter satisfaction and suggestions for improvement and future training. Each item is rated on a five point scale from 1 = very satisfied to 5 = not at all satisfied. Participants are also asked to provide their occupation.

The evaluation team had access to a sample feedback sheets from 17 and mixture of information and awareness presentations for the two months 2 October 2013 to 3 December 2013, representing in excess of 320 participants.

In summary, these indicate that information presentations are being conducted in diverse locations both within the metropolitan area and across the state, a wide cross-section of community service sector and health staff are being targeted, including frontline staff and that the levels of satisfaction with the information presented is high.

Distribution and participant numbers are shown in Table A6 below. Individual session participant numbers ranged from 6 (Scone) to 57 (Penrith).

**Table A6: Information presentation locations and participant numbers**

Local Health District	Specific Location	Participants
Nepean Blue Mts	Katoomba	7
SE Sydney	Gymea	31
SW Sydney	Bowral	16
SW Sydney	Moss Vale	11
Sydney	Campsie	15
Sydney	Rozelle	7
Western Sydney	Blacktown	10
Western Sydney	Parramatta	38
Western Sydney	Penrith	57
Hunter/New England	Armidale	33
Hunter/New England	Beresfield	15
Hunter/New England	Charlestown	25
Hunter/New England	Scone	6
Hunter/New England	Tamworth	19
Western NSW	Bathurst	7
Western NSW	Orange Bloomfield Hospital	10
Western NSW	Orange Community Care Forum	15
<b>TOTAL</b>		<b>322</b>

The highest percentages of participants by occupation were: care workers (33%) and nursing staff (14%) (full range of occupations is shown in **Error! Reference source not found.** below). There appears to be good attendance at presentations by frontline staff.

**Table A7: Participant occupational groupings**

Occupational grouping	Examples	% Participants ( n =175)
Care workers	Domestic assistance	33%
Nursing staff	Clinical nurse specialist, registered nurse, AARCS worker (acute to age care related services)	14%
Senior coordinators/ coordinators/ case managers	HACC, Centre-based Day Care, Ability Links, Community Programs, home modification and maintenance	9%
Allied health professionals	ACAT team, dietician, physiotherapist, social worker, OT	7%
Service managers	Meals on wheels, community development, home care packages	5%
Volunteers		3%
Carers		2%
Other	Aboriginal HACC development officer, ageing and disability Council officer, dementia advisor, multicultural access project officer, administration	27%
<b>Total</b>		<b>100%</b>

### Satisfaction with information presented

As can be seen in Table A8 below, across the 17 sessions, the level of satisfaction with the information presented is high. Eighty eight percent of respondents were satisfied or very satisfied that the information was relevant to their needs and 84% of people are satisfied or very satisfied that the information will assist them to review or improve their current work practices in relation to elder abuse. Ninety percent of participants were satisfied or very satisfied with how the information was structured.

**Table A8: Proportion of respondents rating satisfied or very satisfied with information**

Information questions	% Satisfied/ very satisfied	# Respondents	Individual session range
Was the information relevant to your needs?	88%	320	71%-100%
Was the information presented in a well sequenced, easy to understand format?	90%	321	84%-100%
Will the information assist you to review/ improve your current work practices?	84%	318	57%-100%

### Presenter satisfaction

Levels of satisfaction with the facilitation and flexibility of the presenter were also high, with the proportion satisfied or very satisfied being 88% on both ratings.

**Table A9: Proportion of respondents rating satisfied or very satisfied with the presenter**

Presenter questions	% Satisfied/ very satisfied	# respondents	Individual session range
How satisfied are you with the presentation/ facilitation of the session?	88%	320	70%-100%
Was the presenter flexible and try to accommodate the needs of the group?	88%	320	80%-100%

### Venue satisfaction

Most participants were satisfied or very satisfied with the session venue and amenities.

**Table A10: Proportion of respondents satisfied or very satisfied with the venue**

Venue	% Satisfied/ very satisfied	# respondents	Individual session range
Were the venue and amenities appropriate for the session?	89%	315	70%-100%

### Comments or suggestions about the information presentations

There were a large number of general comments confirming the usefulness and interesting nature of the presentations and the quality of the examples used. Specific suggestions sought the inclusion of additional data about the current incidence of abuse, more material on the identification of abuse, duty of care and responding appropriately to abuse.

### Suggestions for future training

Common themes amongst future training suggestions were:

- abuse of older people with cognitive impairment/ abuse in dementia cases
- service protocols/ workshop on interagency protocol
- elder abuse in CALD
- social inclusion
- changing community attitudes/prevention
- working with the police
- legal advice for older people
- how to deal with abused older persons who refuse help
- service collaboration

## *Governance/ Steering Committee*

The Steering Committee – Prevention of Abuse of Older People was initially established to oversee the establishment of the EAHRU and the review of the protocol. It is chaired by FACS and has broad cross sector representation at a senior level. There is a notional line of reporting from the FACS chair through to the IDC. The Steering Committee meets monthly. The Terms of Reference for the Steering Committee are due to be refreshed to support ongoing implementation activities required now that the Helpline and the Interagency Policy are in place. One of the tasks for the Steering Committee is to agree upon a minimum data set for the helpline.

## *Collaboratives*

The EAHRU has set up seven pilot collaborative sites with the ultimate goal to have all geographical areas of NSW covered by a collaborative. Three pilot sites are located on the North Coast-Port Macquarie/ Camsie, Coffs Harbour, and Lismore/ Ballina; one in the Blue Mountains, one in the Nepean, one in Lane Cove and one at Cobar. The collaboratives consist of local interagency representatives (e.g. GPs, community services, police, ambulance, lawyers) coordinated through a local link person. Meetings, supported by helpline staff, are held bimonthly and there is a common agenda (topic/statistics/resources). The EAHRU helpline is currently developing a MOUs/ 'how to do collaboratives' resource document. There are a variety of auspicing bodies – for example, the Port Macquarie collaborative is auspiced by a local community legal centre Coffs Harbour by HACC and Lismore by the Northern Rivers Social Development Council (NRSDC).

Operating within the NSW Interagency Policy, the collaboratives aim to:

- initiate and engage in local projects and programs related to the prevention of abuse of older people
- raise the levels of awareness and education of elder abuse at the local level
- provide EAHRU with a point of contact if a local abuse matter needs to be resolved
- assist with the distribution of resources provided by EAHRU
- identify local limitations and gaps
- collect best practice stories
- document improvements
- support EAHRU by reporting quarterly on actions, significant issues and recommendations.

The participants in the collaboratives report that they are useful and valuable forums for exchanging information and raising awareness. They require only limited support from the EAHRU – attendance at initial meetings, then provision of regular data on calls to the Helpline from the region. They also are an effective means of implementing the commitments in the Elder Abuse Policy to undertaking local actions. Overall, the collaboratives are an effective and efficient mechanism as part of the broader system of reducing elder abuse.

## ***Local Government Age-Friendly Communities Grants Scheme***

The NSW Ageing Strategy included the highlight Strategy ‘Age-friendly local communities’ which was a grants scheme to assist local councils identify local solutions to issues such as accessibility and social inclusion. There were 26 projects funded from a total of 84 applications.

A comprehensive descriptive overview of the Local Government Age Friendly Community Grants Scheme can be found in the individual project summaries at Appendix A.

Local Government NSW who were contracted to manage the scheme, have undertaken an evaluation of funded projects based on reports received from the individual projects. While this documented the success of these individual projects and their specific benefits towards creating liveable communities, the broader impact of the scheme as a leverage mechanism to raise awareness of ageing issues within local government and local communities and to generate further investment was untested.

As part of the overall evaluation of the NSW Ageing Strategy, a separate online survey was developed for all local government to explore the following research questions:

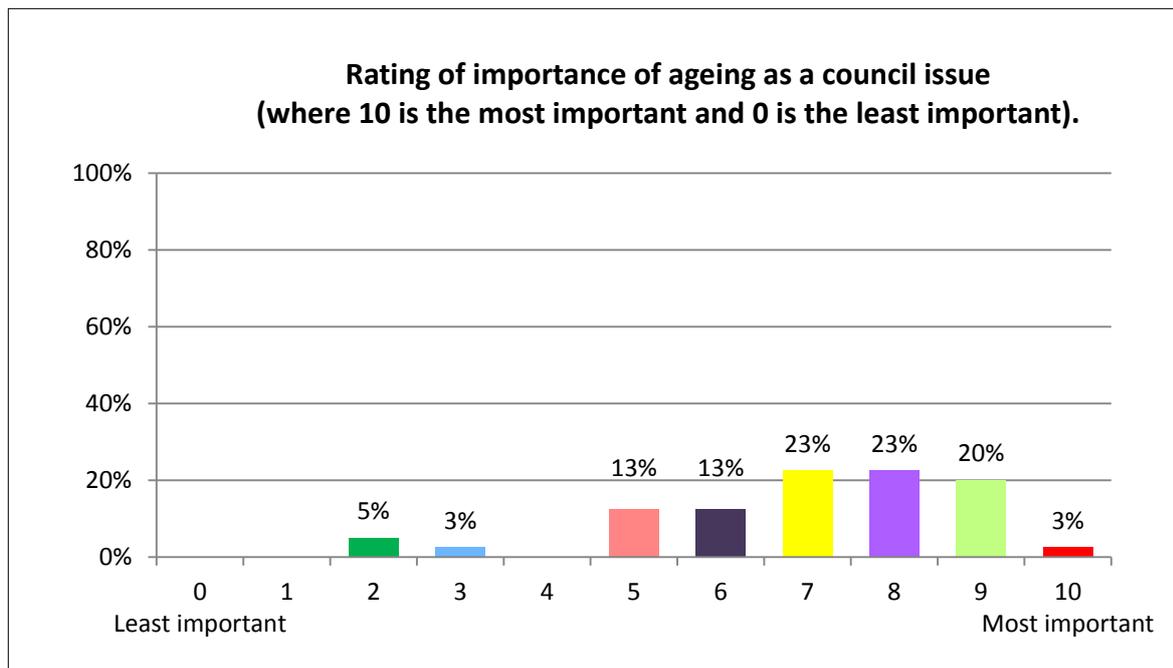
1. *To what extent would Local Government have undertaken these age-friendly local community activities in the absence of the specific Local Government’s grant scheme?*
  - *Were any additional funds contributed by Local Government to each of these projects?*
  - *What impact, if any, did the Local Government grants scheme have on councils which applied for grants but who were unsuccessful? Did any of the projects which were proposed proceed without a grant?*
2. *What was the overall impact of the grants program in raising general awareness of the issues of an ageing population amongst local government and amongst the community more broadly?*

The online survey was distributed to all local governments via the email list of local government contacts managed by LG NSW. The survey was also distributed to a secondary email list of all councils where there is an identified position responsible for ageing and disability matters on behalf of the evaluation team by Margaret Kay Senior Policy Officer – Ageing and Disability, Local Government NSW. Completed surveys were received in respect of 41 local councils. With 152 local councils within NSW this represents a 27% response rate.

### **The importance of ageing as an issue for local government**

Survey respondents were invited to rate the importance of ageing as an issue for their Council on a scale from 0 (least important) to 10 (most important). More than two thirds of respondents (69%) gave rating of 7/10 or higher.

Figure A10: Importance of ageing as an issue for Local Government



### Important ageing issues to be addressed by local Council

Respondents were able to nominate up to 5 ageing issues which were thought to be important to be addressed by their local council. The themes and specific examples which were given have been grouped and listed in the table below in order of frequency of occurrence. The top three concerns were access (mentioned by almost 60% of Councils), housing (mentioned by 46%) and aged care related issues (41% of councils mentioning this). These are consistent with the key themes identified by stakeholders generally in all the interviews for the evaluation.

**Table A1128: Ageing issues of concern to local councils**

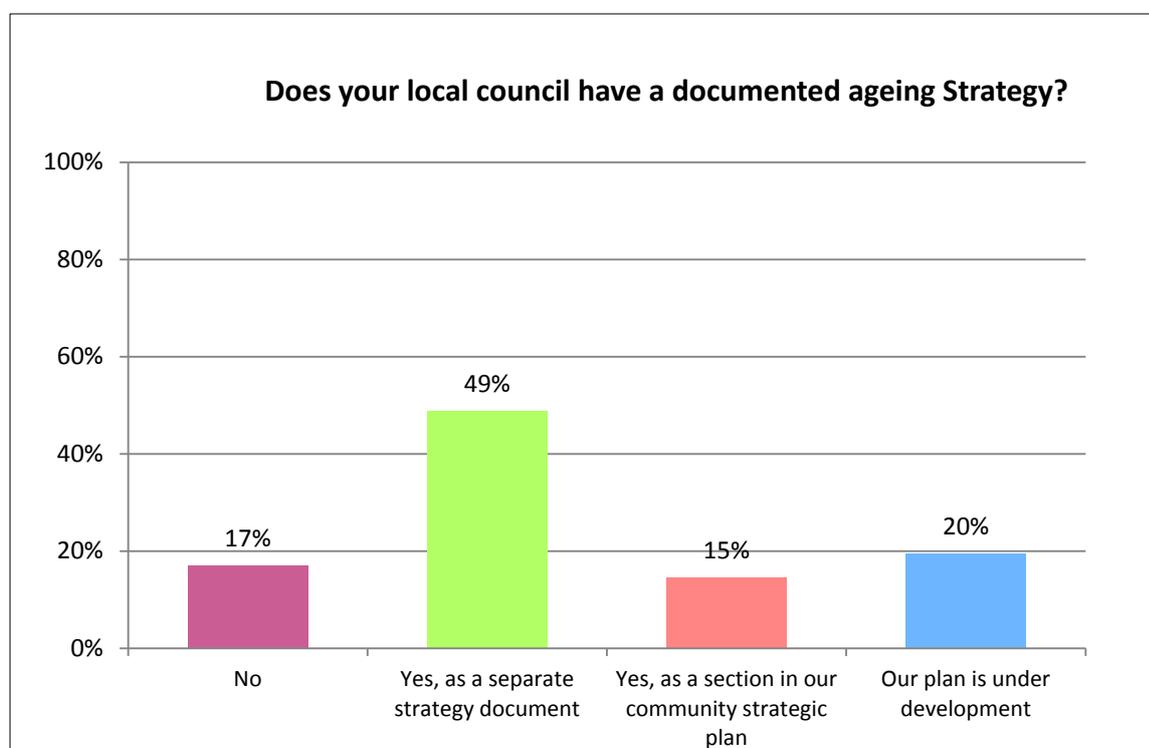
Issue Type	Examples	#	% of issues	% of councils
Access	Age friendly built environment, public space and facility upgrades, supplying and maintaining appropriate age friendly infrastructure	24	17%	59%
Housing	Affordable/adaptable housing, lack of suitable housing for people as they age	19	13%	46%
Ageing population needs/services	Maintaining aged care funding within the LGA, promote ageing in place, care services not available because of waiting lists; support and development of community services	17	12%	41%
Social isolation/inclusion	Making our community aged care friendly, reducing social isolation	12	9%	29%
Health services	Retention of localised health service, access to specialists	12	9%	29%
Transport	Maintaining community transport, transport to and from social activities when residents can no longer drive	12	9%	29%
Recreation/creative aging/physical activity	Active ageing opportunities, events for older people within the community, dancing with dementia, community health and well-being	9	6%	22%
Age care funding/CDC impacts	Monitoring the implications of consumer directed care on rural residents	7	5%	17%
Pedestrian access and mobility	Local foot paths linked to active transport options, connected footpaths, pathways suitable for mobility scooters; mobility/safety; seating and shade along main footpath; safe walking tracks, lighting	7	5%	12%
Information	Information on ageing, well-being issues	5	4%	17%
Activity /service costs/poverty	Costs to ageing population of participation in activities	4	3%	10%
Employment	Increased working options for older workers; age of council workforce	3	2%	7%
Financial impact on council	Impact on services of a reduction in rates collection; sustainability of service delivery, given changes to aged/disability sector funding	3	2%	7%
Other	Impact of climate – heat, bushfire, floods; funding for ageing population planning staff; senior management awareness of the issue; development of an ageing Strategy; CALD older population; integrated planning	7	5%	17%
<b>Total issues</b>		<b>141</b>	<b>100%</b>	

### Local government ageing strategies

The majority of local councils who responded to the survey have their own documented ageing strategy. Just under half (20 councils) have a separate Ageing Strategy document, an additional six councils cover ageing as part of their community strategic plan and a further eight councils have a plan under development. This brings to 83% the proportion of councils who directly address ageing issues. This is likely to be an over estimate when extrapolating across all 152 local councils in NSW as those with a higher interest in ageing are more likely to have responded to the survey.

It is of interest to note that seven<sup>10</sup> councils indicated that their ageing strategy was developed as part of the Age Friendly Community Local Government Grant Scheme. This would suggest that the grants scheme has been quite successful in ensuring that ageing issues are subject to active consideration by local councils, with these councils representing 35% (7/20) of those who have an ageing Strategy.

Figure A11: Local Government ageing strategies



### Links between the creating liveable communities competition and the 2012 Grants scheme

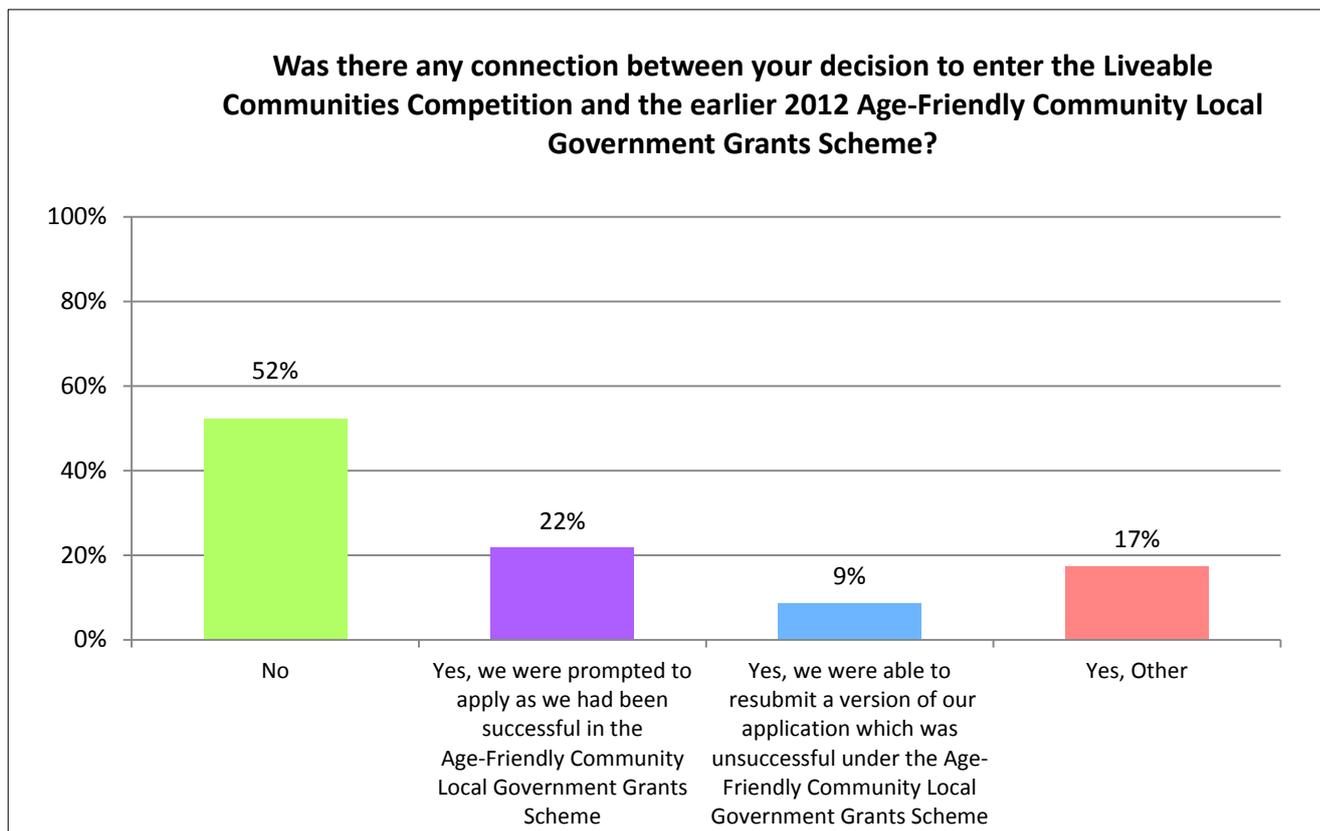
FACS has recently funded a further initiative through Local Government NSW to assist local councils to create liveable communities (with a broader focus on ageing, people with disability and carers). Applications for this competition closed on 12<sup>th</sup> December 2014. The current survey sought to understand any impact which the earlier age friendly community local government's grant scheme

<sup>10</sup> Overall, 10 projects in the grants scheme funded the development of ageing strategies. (One of these was a joint Strategy between two Council areas).

may have had on decisions to enter this more recent competition. Twenty-three (56%) of respondents had entered the competition.

Eleven councils reported that the earlier grants scheme had impacted on their decision to apply. The nature of the impact is shown in the figure below.

**Figure A12: Links between the Creating Liveable Communities Competition and the 2012 Age-Friendly Community Local Government Grants Scheme**



Amongst the other category (four councils), two respondents had missed the timeframe for the previous 2012 Grants scheme, one wished to develop a dementia friendly community Strategy<sup>11</sup> and one had implemented some of their previously unsuccessful grant proposal and wished to expand on this.

### Participation in the Age-Friendly Community Local Government Grants Scheme

Amongst the 41 survey respondents, 24 had applied for an Age Friendly Community Grant. Fifteen of these 24 applicants were successful (63% success rate). This is a higher ratio of success than within the grants scheme overall, which had a total of 26 grants being awarded from 84 applications (31% success rate). Again, this is likely to be reflective of a higher interest in ageing amongst those who have responded to this survey.

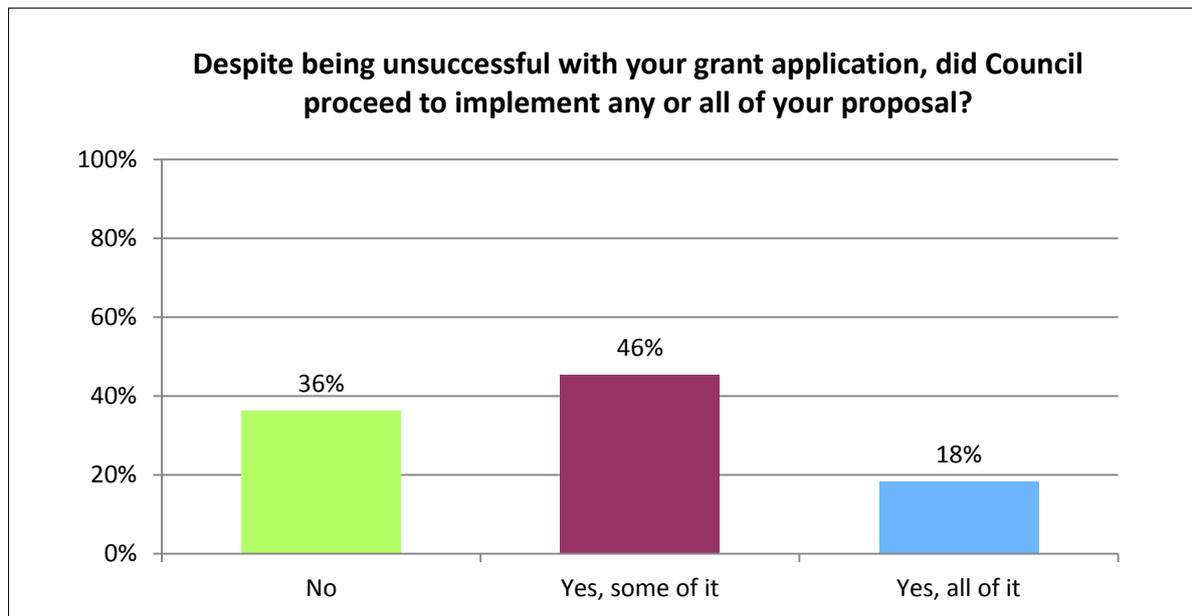
<sup>11</sup> This Council already has an ageing Strategy

## Impact of the local government grants scheme

### Impact on Council initiatives

There were seven Councils who proceeded with all or some of their proposals, even though they did not secure a grant.

Figure A13: Unsuccessful applications which were implemented



Of these, two indicated that they implemented it all (e.g. a 2014 access audit which was completed). Five had partially implemented their proposal (e.g. installation of age friendly outdoor equipment at one location).

### Additional financial contributions

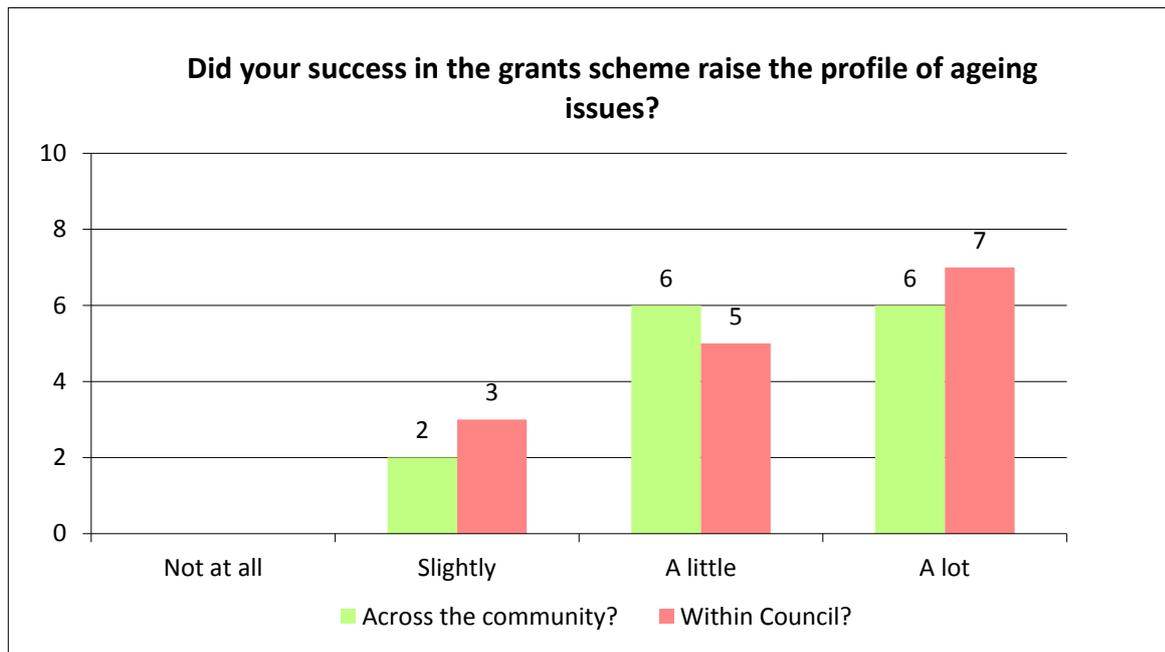
Additional financial contributions were made by 11 of the 15 councils who had been successful in the grants scheme. Two relied entirely on the grant funding, one received additional monies from another government agency and one did not provide any information either way.

There were no additional contributions reported from either community sources or local business. No information was sought on the \$ value of these additional contributions.

### Impact on the profile of ageing

Amongst the 15 grant recipients, the grants scheme raised the profile of ageing both within Council and across the community. The extent of the impact within Council was slightly higher than in the general community with 47% reporting that the profile had been raised a lot compared to 40% who reported that it had been raised a lot in the community.

**Figure A14: Increase in the profile of ageing**

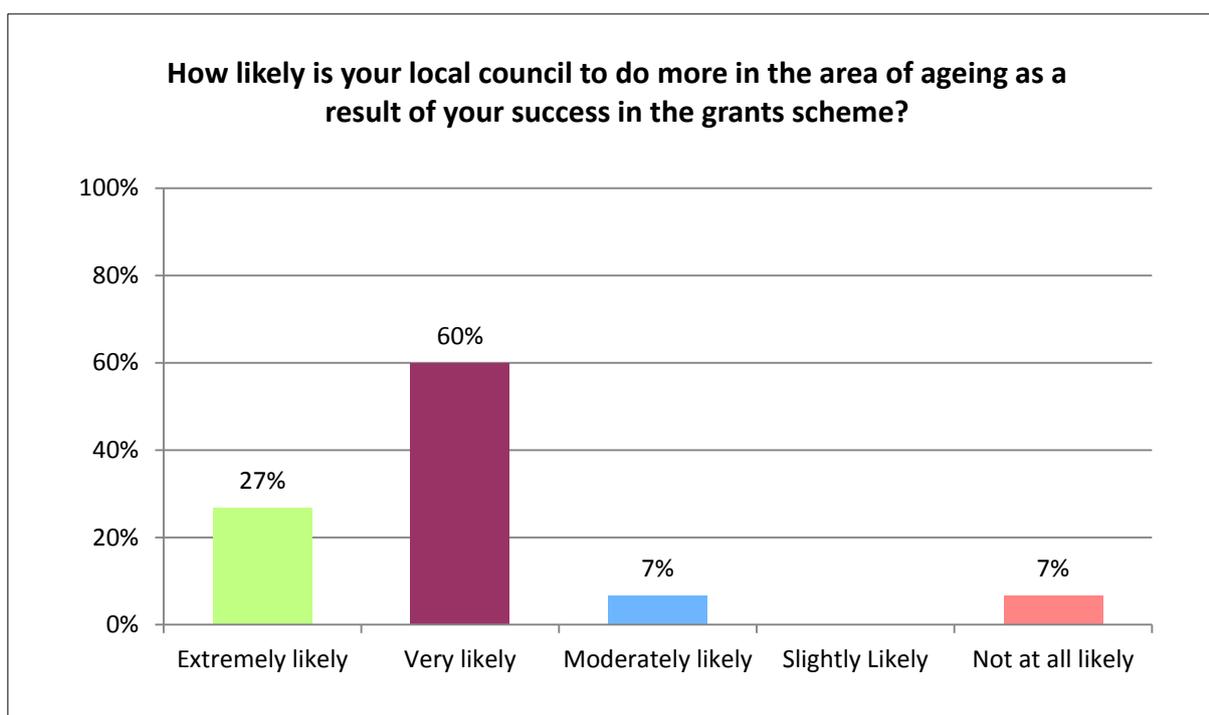


**Catalyst for additional activities**

Over half of the successful councils (8/15 – 53%) reported that they had undertaken additional actions, activities or initiatives as a result of receiving the grant. In one case, this was an application for WHO ‘Age-Friendly Communities’ recognition. In others, additional work was undertaken at the location, ‘Yellow Brick Road’ connected footpaths were piloted, action plans were developed, a partnership was formed with Alzheimer’s Australia and a university, a community centre facility was redeveloped and additional sources of funding were pursued.

There is a high probability of further activity in the area of ageing as a result of successes in the grants scheme with 13 of 15 (87%) respondents reporting that they are very likely or extremely likely to do so.

**Figure A15: Likelihood of further activities in the area of ageing**



### ***Suggestions to encourage Local Government to improve “age-friendliness” of local communities***

A range of suggestions was made by respondents for encouraging Local Government. Many of these focused on support for councils through grants and funding to enable age friendly local infrastructure, including better linkage of these to the four-year planning cycles of local government and continued support and promotion of the Liveable Cities Program. It was noted that money is always a problem in small communities.

Other themes were:

- planning for an ageing population in all council’s strategic planning, including mandating ageing plans
- sharing ‘how-to’ resources and successful projects/ creating linkages and networks across councils
- increased recognition for the efforts made by local government to improve ‘age-friendliness’
- looking to the contributions that can be made by the senior community
- increased access to supports for active ageing, including alternative forms of housing, transport, and access to health and services.

### ***Summary***

Based on feedback from the 37 councils who responded to the evaluation survey (25% response rate), there is considerable evidence that the Age-Friendly Communities Local Government Grants Scheme has contributed to raising both the broader profile of ageing within Local Government and the level of activity undertaken by Local Government beyond the specific projects which were funded.

Six Councils implemented all or some of their proposals in the absence of funding; successful funding leveraged additional local Council contributions in 70% of projects, and the general profile of ageing has been raised both within local government and the broader community to a significant extent for 50% of respondents. The development of Local Government ageing strategies has been the direct result of the funding scheme for a number of councils; within the sample this accounts for almost 40% of those who have an ageing strategy. Similarly, over half of successful councils reported they have undertaken additional activities or initiatives. Eighty six percent of respondents are very likely or extremely likely to undertake further activity in the area of ageing as a result of their successes in the grants scheme.

## Appendix D - Peak bodies

As part of the evaluation of the NSW Ageing Strategy, interviews were conducted with the peak ageing organisations to explore the following questions:

- input of the organisation to the development of the NSW Ageing Strategy
- influence of the Strategy on the activities of the organisation
- views about the framing of the Strategy, in particular the ‘whole of government’ approach and the framing around age cohorts
- views about the outcomes of the Strategy
- ideas for the future.

FACS provides funding to 4 peak bodies/specialist ageing organisations in NSW:

- Council on the Ageing (COTA) NSW
- Combined Pensioners and Superannuants Association (CPSA)
- The Aged Care Rights Service (TARS); and
- The Older Women’s Network (OWN)

**Table B1: Funding for peak ageing groups, July 12 to June 14**

	<b>Total</b>
<b>COTA</b>	804,924
<b>CPSA</b>	905,077
<b>OWN</b>	251,444
<b>TARS</b>	154,978
<b>Total</b>	<b>2,116,423</b>

As part of the evaluation of the NSW Ageing Strategy, interviews were conducted with each of these organisations to explore the following questions:

- input of the organisation to the development of the NSW Ageing Strategy
- influence of the Strategy on the activities of the organisation
- views about the framing of the Strategy, in particular the ‘whole of government’ approach and the framing around age cohorts
- views about the outcomes of the Strategy
- ideas for the future.

### *Summary*

The interviews showed that the peak bodies had played a valuable role in the development of the NSW Ageing Strategy and conversely, the NSW Ageing Strategy had guided the work of the peak bodies. Each of them had responded appropriately to reshaping their work programs in line with the intentions of the Ageing Strategy. This included undertaking considerable research in both the areas of housing and transport need.

## **Input into the development of the Strategy**

All groups reported participation in the development stages of the Strategy, including participation in round table discussions in 2011 and direct engagement with the then Office for Ageing (OfA) as well as provision of written submissions and recommendations.<sup>12</sup>

OWN in particular, noted that its own advocacy and community engagement functions did not sit comfortably with an aged care approach. They were of the view that this was then influential in changing the approach reflected in the current NSW Strategy to one of healthy ageing.

COTA believed it was advantaged in its level of influence through the transfer of a staff member to the Office of the Minister for Ageing around the time of the development of Strategy.

There was praise for the delivery of the Strategy following earlier (pre-election) commitments to its development. Similarly, there was strong support for the creation of the NSW Elder Abuse Helpline.

## **Influence of the Strategy on the activities of the organisation**

Each of the organisations noted that the Strategy had been influential in guiding their own activities, both directly in terms of participation in individual highlight projects and more generally in terms of shaping the direction of work plans and activities. A specific example of a significant piece of work in this latter category is the 2014 report '*Affordable housing for older people and people with a disability in NSW*' undertaken by CPSA. This document aimed to provide a comprehensive, affordable housing policy articulating the issues, obstacles, opportunities and options that impact on the housing choices for older people on low incomes and adults on low incomes who have a disability.<sup>13</sup> CPSA reported that the Ageing Strategy had given them a mandate to explore the area of housing and older people.

Similarly, COTA has undertaken an annual consumer survey (The 50+ report) in both 2013 and 2014. The 2013 report had a focus on health and well-being and in 2014, the focus was on how and where older people are living and the 2015 survey will be about information.

### ***Specific Strategy areas:***

#### **Linking seniors to information**

Each of the organisations act as a conduit for providing information to older people/members in the community. This allows promotional activities to be undertaken and particular initiatives to be publicised, for example, Tech Savvy Seniors.

Depending on the organisation, there are a number of regular publications, both web-based and print based and access to information by telephone. For example, "OWN MATTERS", a newsletter of the older women's network published 11 times per annum

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<sup>12</sup> For example: <http://www.cpsa.org.au/health/health-submissions/531-submission-to-the-nsw-whole-of-government-ageing-Strategy>

<sup>13</sup> CPSA (2014) "Affordable housing for older people and people with a disability in NSW"

Links to a membership base also provide an avenue through which opinions and views can be surveyed on particular issues of concern. For example, CPSA have recently surveyed their members about transport use and access.

### **Transport**

CPSA is a member of the Transport NSW Older Persons Transport and Mobility Plans Steering Group which met for the first time in November 2014. Its goals include investigation of ways to encourage public transport uptake amongst older people. They were also involved in the NSW Older Driver Task Force, but resigned from this committee as they did not support continuation of on road older driver testing.

OWN is currently finalising a report which has researched their member's use of public and private transport.

### **My life, My Decisions – 'Get it in Black & White'**

As part of the 'Get it in Black & White' campaign, CPSA worked with TAG to publicise the website; assist with creating plain language template forms and running a number of focus groups.

In conjunction with the campaign, CPSA also undertook a program with its branches and the wider community, offering pro bono legal assistance which was provided by law students – who were using a script/ standard clauses to encourage people to get will. Overall this project proved to be difficult to administer – both in securing the services of the law students and in finding that people wanted assistance to develop more complex wills. There was a view that a purchased will pack could probably work as well as the program and it was not continued.

TARS reported that stronger cooperation with the campaign was needed. It was noted that TARS had not been included as a source of information and advice that people could call and that the TARS contact details were not currently on the 'Get it in Black & White' website. The TARS website is currently being refreshed and this has created the potential for reverse linkages, linking people on the TARS website to the 'Get it in Black & White' website. Stronger linkages could also build on the work which TARS has undertaken with respect to getting important documents in place for people who are indigenous. Through 'The good services mob' –an unfunded collaboration which is part of their consumer protection remit, TARS has made use of yarnning circles with the largest emphasis being on the writing of wills.

### **NSW Elder Abuse Helpline**

The strong support for the NSW Elder Abuse Helpline has been operationalised through participation in the steering committee by COTA. TARS reported that their own monitoring of data on abuse has shown an increase in the instances of financial abuse coming to their attention.

OWN noted that their own events sometimes create a safe environment for elder abuse disclosure and an opportunity to refer to the helpline. There is potential for closer linkages in the future. They have held a state-wide forum on the area of tackling abuse.

## **Tech Savvy Seniors**

The peak bodies were very supportive of this initiative and played a role, both in publicity about courses and in the distribution of resources. CPSA reported that they received many calls about the program and that they continue to lend out the DVDs. They described the response they received as much greater than expected. Similarly, OWN reported that many members had participated in the training and they are also distributing the DVD. Promotion of computer literacy amongst older people was seen as very important and it was noted that lack of these skills amongst the older generation could also increase the potential for financial abuse.

## **Views about the framing of the Strategy**

There was strong support for the move away from a 'frail aged' approach to embrace healthy ageing as an underpinning of the Strategy and the impact of this on ensuring that the Strategy covered what it should cover in the light of the role of the NSW government.

With respect to the cohort approach there were mixed views. OWN, TARS and CPSA were supportive of the approach, with the reservation that the Strategy had struggled to gain traction at the level of the 'middle years'. This was ascribed to a view that people don't want to be seen to be older. COTA suggested that a life stages approach may have been more helpful.

## **Views about Strategy outcomes and suggestions for the future**

The most positive impacts of the Strategy were seen in those areas where there had been concrete activities; the establishment of the NSW Elder Abuse Helpline, Tech Savvy Seniors, 'Get it in Black & White campaign' and some of the individual wellness activities conducted as part of Living Active Lives. There was scope to refresh and strengthen the "Get it in Black & White" campaign, including greater linkages with TARS and GPs.

Transport and housing were identified as important areas into the future. Affordable housing, especially for people renting privately and living in high cost areas was a major concern when they move to fixed income on retirement. There was a need for people in their 50s in this situation needing to plan ahead and for the government to have options in place. Options need to recognise the importance of people maintaining their social connections within their local communities. Any future Ageing Strategy should include more tangible housing outcomes.

There was support for adoption of a W.A. co-operative housing model - OWN has workshopped this with their co-ordinators. Essentially it involves an individual remodelling their current house to convert it into two dwellings, resulting in an increase in the housing stock and potential for provision of on-site support. This would require a mechanism to provide the financial assistance needed to do the dwelling conversion. The concept of a 'virtual' retirement village which enabled older people to maintain control while accessing support was deemed worthy of exploration.

The impact of lack of transport, especially community transport, may mean that some people spend longer in hospital than they need to because transport inadequacies mean they can't return for daily treatment. There was a suggestion of provision of travel training on the use of public transport in locations where it exists. This could facilitate people developing these skills prior to giving up driving.

The Strategy had been deficient in both the Indigenous and CALD areas. This could be an area for specific project/s in a refreshed Strategy.

OWN suggested a need for a greater focus on gender and ageing, which would recognise the significant differences for older women relating to housing, income and health.

## Appendix E – Ageing Strategies in other Australian States

There is a general consistency across the States around the issues that are given priority in ageing commitments.

### Victoria

The Victorian Plan is called *Seniors Count! – Victoria’s Seniors Participation Action Plan 2014 - 2019*. It was developed on behalf of the Government by the Ministerial Advisory Committee for Senior Victorians, led by the independent Commissioner for Senior Victorians, Gerard Mansour (FACS and MACA representatives provided input into the Victorian plan).

The plan outlines priority areas to better support seniors and create more age-friendly communities. Over the next five years, the plan will:

- address the digital divide of many seniors not connected to the internet
- support the mature age workforce
- improve understanding of health and ageing
- create more age-friendly communities
- promote life planning for seniors
- people aged 60 and over and working 35 hours or more per week will be able to apply for a new Seniors Business Discount Card that will be introduced in 2015.

### Queensland

The Queensland plan is titled *Positively Ageless: Queensland Senior Strategy 2010-2020*. It connects with *Toward Q2: Tomorrow’s Queensland, The State of Queensland* (Department of the Premier and Cabinet) 2008. The plan has a ‘whole of community’ focus and identifies five priority areas to achieve the vision of an age-friendly state:

- valuing and empowering seniors
- improving health and wellbeing
- promoting workforce participation, independence and mobility
- supporting community participation and age-friendly communities
- providing information and improving communication.

### Western Australia

There is no specific ageing Strategy. The Department of Local Governments and Communities plays a lead role in encouraging a coordinated response to the implementation of the Government’s policy priorities for seniors.

The vision is of a Western Australia ‘where all Western Australians age well in communities in which they matter, belong and contribute’. Specific aims are to:

- focus on and enhance the age-friendliness of Western Australia
- work in partnership with all levels of government and seniors’ organisations, service providers and academia, to develop research, policy and programs that enhance seniors’ health, participation and community engagement

- raise community awareness around the issues of elder abuse and support services to respond to this issue
- increase the awareness of grandparents as parents raising grandchildren and encourage support services for them
- enhance the benefits of the Seniors Card.

### South Australia

There is both a plan, *Prosperity Through Longevity: South Australian's Ageing Plan, Our Vision 2014-2019* and an *Action Plan 2014-2019*. The vision and action plan are managed by the South Australia Office for the Ageing. The priorities are:

- Acknowledge our population's wide diversity
- Respond directly to the voices of older South Australians
- Recognise seniors as vital drivers of the state's social infrastructure and economy
- Uphold the right of seniors to safety, security and informed decision making
- Promote the participation of seniors in civic life and support opportunities for lifelong learning and social and economic engagement
- Support good urban and regional planning for user friendly environments that benefit all ages
- Promote the value of intergenerational collaboration.

### ACT

The ACT Government has the *Strategic Plan for Positive Ageing 2010-2014 – Towards an Age Friendly City*, overseen by the ACT Office for Ageing, Department of Disability, Housing and Community Services. The aim is to create a city where older people are respected, valued and supported to actively participate in, and contribute to their community and the stated vision is 'Canberra will be an age-friendly city that optimises the quality of life of its citizens through opportunities for health, participation and security as we age'.

The intended outcomes of the plan are:

- Information & Communication - People in the ACT easily access information about healthy living, retirement, planning, support services and products, entitlements, and community groups and clubs
- Health and Well-being - People in the ACT maintain their health and well-being across their lifespan to allow them to age positively and to actively participate in their community as they get older
- Respect, Valuing and Safety - seniors feel respected and valued and experience the ACT as a safe place to live and visit
- Housing and Accommodation - ACT seniors access appropriate and affordable housing
- Support Services - Seniors use appropriate and accessible support services to assist them to maintain active and relatively independent lives
- Transport and Mobility - seniors easily move around in their community through personal, community and public transport, and walkways

- Work and Retirement - People plan for their retirement and, once retired, continue to actively participate in our community through paid and unpaid work, and through educational and recreational activities.

## **Tasmania**

Tasmania has the *Inclusive Ageing Tasmania 2012-2014 Strategy*. This forms part of the overarching response of the Tasmanian Government to support a more socially inclusive society in the context of an ageing population. The plan is overseen by the Community Development Division, Department of Premier and Cabinet.

The key objective of the Strategy is to increase the capacity for all older people to be fully included in community life, particularly those who are socially excluded or at risk of becoming excluded. The Tasmanian Government has committed to undertake six inter-related projects in seeking to benefit the lives of older Tasmanians. The projects reflect the priorities highlighted in the community consultation undertaken in 2011. The projects are:

- Building evidence: a demographic profile
- Finding out: accessing the right information at the right time
- Supporting resourcefulness: living affordability
- Engaging in different ways: voluntary contributions
- Improving access: age-friendly communities
- Contributing economically: workforce participation.

In addition, the Strategy also outlines the way the Government will work to ensure the best possible outcomes for older people including working in partnership; engaging with a broad range of older people and building on strengths, existing work and relationships across the community.

Council on the Ageing (Tasmania), (COTA TAS), the peak non-government organisation, funded by the Tasmanian Government, has received a significant increase in funding from the Government to increase its capacity to contribute to the implementation of the projects underpinning the Strategy.

## **Northern Territory**

There is no specific ageing Strategy. The Northern Territory Office of Senior Territorians engages with the community and government agencies to ensure a coordinated approach to the implementation of government's policy priorities for Territory seniors. The office is responsible for several initiatives relating to seniors – and is guided by '*Framing the Future*' which is the strategic plan that sets out the Government's policy that will underpin service delivery for all Territorians, which encompasses the older age groups.

## Appendix F – Consultation

Stakeholder/ Group	Action
<b>FACS team</b>	<p>Interviews with:</p> <ul style="list-style-type: none"> <li>▪ Michael Woodhouse</li> <li>▪ Andrew Gabriel</li> <li>▪ Jane Cleur</li> <li>▪ Michele Whitbourne</li> <li>▪ Abigail Gray</li> <li>▪ Gareth Wreford</li> <li>▪ Dee Hughes</li> <li>▪ Lauren Younan</li> </ul>
<b>Inter Departmental Committee</b>	<p>Presentation of proposed approach to the evaluation (April 14)</p> <p>Presentation of preliminary findings (Nov 14)</p> <p>Interviews with:</p> <ul style="list-style-type: none"> <li>▪ Kate Burford &amp; Melanie Hawes (Department of Premier &amp; Cabinet)</li> <li>▪ Ric Sondalini (NSW Treasury)</li> <li>▪ Anthony Wing (Transport for NSW)</li> <li>▪ Halvard Dalheim (Department of Planning and Environment)</li> <li>▪ Katherine Birchfield, Stephanie Williams, Barbara Anderson (Ministry of Health)</li> <li>▪ Rod Stowe (Commissioner for Fair Trading)</li> <li>▪ Amanda Chadwick (Department of Trade and Investment, Regional Infrastructure &amp; Services)</li> <li>▪ Mary Darwell (Executive Director, Arts NSW)</li> <li>▪ Helen Rogers (Department of Education &amp; Communities)</li> <li>▪ Imelda Dodds (CEO, NSW Trustee &amp; Guardian)</li> <li>▪ Ian Day (CEO, COTA NSW)</li> <li>▪ Noel Baum (Director, Policy, Local Government NSW)</li> </ul>
<b>MACA</b>	<p>Interviews with:</p> <ul style="list-style-type: none"> <li>▪ Ms Kathryn Greiner (Chair);</li> <li>▪ Les Ahoy</li> <li>▪ Dr Abby Bloom</li> <li>▪ Adjunct Professor Michael Fine</li> <li>▪ Lloyd Graham</li> <li>▪ Assoc Professor Diana Olsberg</li> <li>▪ Valerie Pratt</li> <li>▪ Deborah Schofield</li> </ul> <p>Presentation of preliminary findings (November 2014)</p>
<b>Wider stakeholders -</b>	<ul style="list-style-type: none"> <li>▪ Kerry Marshall, Senior Coordinator, Elder Abuse Helpline and Resource Unit</li> <li>▪ Sptd Rob Critchlow, Commander, Hills Area Local Command, NSW Police</li> <li>▪ Barbara Anderson, Principal Policy Advisor, Ministry of Health</li> <li>▪ Ruth Pollard, Asst Director, Legal Services, NSW Trustee &amp; Guardian</li> <li>▪ Paul Sadler, Vice President, Aged &amp; Community Services NSW</li> <li>▪ David Birds, Manager, Growth Policy, NSW Planning &amp; Infrastructure</li> <li>▪ Sue Brown, Housing NSW</li> <li>▪ Chris Johnson, Urban Taskforce</li> <li>▪ Felicity Wilson, Property Council</li> <li>▪ Margaret Kay, LG NSW</li> <li>▪ Kim Spinks, Manager, Strategic Initiatives, Arts NSW</li> </ul>

Stakeholder/ Group	Action
	<ul style="list-style-type: none"> <li>▪ Liz Argent, General Manager, Business Development, NSW Trustee &amp; Guardian</li> <li>▪ Megan Osborne, Marketing Manager, NSW Trustee &amp; Guardian</li> <li>▪ Carolyn Smith, A/Mgr, Information &amp; Support, Public Guardian</li> <li>▪ Julie Letts, Manager, Clinical Ethics &amp; Policy, Office of the Chief Health Officer</li> <li>▪ Sharon Dwyer, NSW Education &amp; Communities</li> <li>▪ Anne Doherty, State Library</li> <li>▪ William von Armfeld, Telstra</li> <li>▪ Gail Lebransky, Principal Manager, Accessible and Inclusive Transport, Transport for NSW</li> </ul>
<b>Focus groups</b>	Focus groups held in Chatswood, Burwood, Parramatta, Ballina, Dubbo, Queanbeyan
<b>Community survey</b>	Telephone survey – 800 people (400 aged 50-65; 400 aged 65+); randomly selected



3. The NSW Ageing Strategy is designed to help seniors and adults in their middle years live healthy, active and socially connected lives. Can you tell me whether you- “know a fair bit about the NSW Government’s ageing strategy” “know a little about it”, “have heard of it but know nothing about it”, or “have never heard of it”?  
Record response in table below

4. The NSW Ageing Strategy includes several initiatives aimed at seniors and adults in their middle years to help them live healthy, active and socially connected lives. For each of the following initiatives can I ask you to indicate (as before) whether you - “know a fair bit about that initiative” “know a little about it”, “have heard of it but know nothing about it”, or “have never heard of it”? Record response in table below

AGEING STRATEGY/HIGHLIGHT PROJECTS		Know <u>a fair bit</u>	Know <u>a little</u>	Have heard /know <u>nothing</u>	<u>Never</u> heard of it
<b>ALL</b>					
3.	The NSW Ageing Strategy	1	2	3	4
<b>4.</b>					
		Know <u>a fair bit</u>	Know <u>a little</u>	Have heard /know <u>nothing</u>	<u>Never</u> heard of it
<b>ALL</b>					
4a.	A helpline and resource centre tackling <u>elder abuse</u>	1	2	3	4
<b>SENIORS (65+) ONLY</b>					
4b	An initiative with Telstra called “ <u>Tech Savvy Seniors</u> ” offering low-cost training for seniors to learn to use technology (smart phones, tablets and computers) .	1	2	3	4
4c	Initiatives and partnerships <u>with local Councils</u> to create age friendly local places and increase the accessibility of community facilities	1	2	3	4
4d	A program to encourage seniors to <u>use public transport</u> more often.	1	2	3	4
<b>MIDDLE YEARS (50-64) ONLY</b>					
4e	Access to <u>subsidised work training</u> programs for the over 50s	1	2	3	4
4f	Community education activities about <u>completing wills</u> , powers of attorney, enduring guardianship, including the Get it in Black and White planning ahead website	1	2	3	4
4g	A Community education strategy encouraging the over 50s to <u>plan ahead</u> when making decisions about work, housing, finance, social connections, health and lifestyle.	1	2	3	4

5. For each of the following eight items regarding your **personal wellbeing**, can I ask you to rate each aspect on a scale of 0 (zero) to 10, where 0 (zero) is completely dissatisfied and 10 completely satisfied with 5 being neutral.

How satisfied are you...?		<div style="display: flex; justify-content: space-between; font-size: small;"> <span>Completely Dissatisfied</span> <span>neutral</span> <span>Completely Satisfied</span> </div>										
5a	...with your life as a whole?	0	1	2	3	4	5	6	7	8	9	10
5b	...with your standard of living?	0	1	2	3	4	5	6	7	8	9	10
5c	...with your health?	0	1	2	3	4	5	6	7	8	9	10
5d	...with what you are currently achieving in life?	0	1	2	3	4	5	6	7	8	9	10
5e	...with your personal relationships?	0	1	2	3	4	5	6	7	8	9	10
5f	...with how safe you feel?	0	1	2	3	4	5	6	7	8	9	10
5g	...with feeling part of your community?	0	1	2	3	4	5	6	7	8	9	10
5h	...with your future security?	0	1	2	3	4	5	6	7	8	9	10

6. For each of the following (three) items, can I ask you to indicate your current level of knowledge, experience or activity in each area on a scale of 0 (zero) to 10, where 0 (zero) is none or not at all and 10 is at a very high level.

		<div style="display: flex; justify-content: space-between; font-size: small;"> <span>None None at all</span> <span>Very High Level</span> </div>										
<b>SENIORS (65+) ONLY</b>												
6a	Your level of ability using newer technology such as smart phones, tablets and computers <i>0=know nothing/don't use, 10=expert</i>	0	1	2	3	4	5	6	7	8	9	10
6b	The extent to which you get out and connect in the community <i>0=sedentary/stay at home 10=very active get out a lot</i>	0	1	2	3	4	5	6	7	8	9	10
6c	Your frequency of use of public transport <i>0= never use 10= use regularly</i>	0	1	2	3	4	5	6	7	8	9	10
<b>MIDDLE YEARS (50-64) ONLY</b>												
6d	Your confidence that your current level of qualifications and training gives you the ability to choose where and how long you will work for in the future <i>0=not at all confident, 10=highly confident</i>	0	1	2	3	4	5	6	7	8	9	10
6e	Your preparedness for ageing with having completed critical legal documents such as wills, powers of attorney, enduring guardianship etc <i>0=not prepared at all, 10=organised, all sorted</i>	0	1	2	3	4	5	6	7	8	9	10
6f	Your preparedness for ageing with financial planning such as super, investments, owning your own home or having somewhere to live going forward <i>0=not prepared at all, 10=organised, all sorted</i>	0	1	2	3	4	5	6	7	8	9	10

Thank you...that's all the questions I have but just to ensure we have a range of age groups in the survey, could you please tell me–

9. Are you? *Read out*
- |                     |                |   |
|---------------------|----------------|---|
| <i>Middle Years</i> | 50-54          | 1 |
|                     | 55-59          | 2 |
|                     | 60-64          | 3 |
| <i>Seniors</i>      | 65-69          | 4 |
|                     | 70-74          | 5 |
|                     | 75-79          | 6 |
|                     | 80+            | 7 |
|                     | <i>Refusal</i> | 8 |

And which of the following best describes your current circumstances right now....?

10. Are you currently? *Read out*
- |                                    |   |
|------------------------------------|---|
| Employed full time                 | 1 |
| Employed part-time                 | 2 |
| Fully Retired                      | 3 |
| _____ or something else? (specify) | 4 |
| <i>Refusal</i>                     | 5 |

11. Do you live....? *Read out*
- |                           |   |
|---------------------------|---|
| By yourself               | 1 |
| With your spouse/partner  | 2 |
| Or with relatives/friends | 3 |
| _____ Other (specify)     | 4 |
| <i>Refusal</i>            | 5 |

12. And are you...? *Read out*
- |                                       |   |
|---------------------------------------|---|
| Married or in a De Facto relationship | 1 |
| Divorced/separated                    | 2 |
| Widowed                               | 3 |
| Or Never Married                      | 4 |
| _____ Other (specify)                 | 5 |
| <i>Refusal</i>                        | 6 |

13. And finally, do you...?
- |                              |   |
|------------------------------|---|
| Fully own your home          | 1 |
| Have a mortgage on your home | 2 |
| Or Rent                      | 3 |
| _____ Other (specify)        | 4 |
| <i>Refusal</i>               | 5 |

Thank you very much for your time and interest. That completes the actual survey, but my supervisor may check the veracity of my work with a very brief call in the next few days (they call about 10% of my interviews). Apart from the random checking process, you will not be contacted again after this survey, nor will your name be recorded on any database.