A Guide for the Development of a Comprehensive System of Support to Promote Active Aging











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Introduction

his document is intended to stimulate a dialogue among the Pan American countries regarding the basic elements of a regional strategy for active aging and, through this dialogue, to reach a consensus on how to promote health and wellbeing in old age. A Guide for the Development of a Comprehensive System of Support to Promote **Active Aging** proposes an integrated system of opportunities and protections to promote active aging and provides a critical road map to program development articulating the relationship of the various determinants of health.

The countries in the region are at different points in their demographic and epidemiological transition; for this reason, the rate of the reorientation of the social and health services for the promotion, protection, and care of the health and well-being of older persons is different according to the prevailing situation in each country.

During the 25th Pan-American Health Conference (1998), the Board of Directors of the Pan-American Health Organization (PAHO) encouraged the Member States to formulate policies, plans, and programs to promote active aging, considering that:

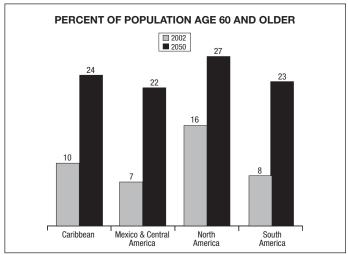
- The health of older persons has a significant impact on various dimensions of the development and functioning of societies, requiring an intersectoral approach guided by normative and legal instruments that is based on research and supported by competent human resources and health care services sensitive to the needs of aging persons.
- It is necessary to strengthen the capacity of the primary health care sector to provide a continuum of services throughout the life cycle.
- It is necessary to reinforce the capacity of older persons to achieve the development of healthy environments, as well as the creation of infrastructures to support family members who act as caregivers, the development of community alternatives to institutionalisation, and the promotion of intergenerational programs.¹

This Guide has been developed as part of the horizontal collaboration between Mexico and Canada, with technical support from PAHO. The

Guide complements the policy guide published by the World Health Organization, Active Aging: A Policy Framework, with the collaboration of Health Canada. Both documents will serve to guide the Regional implementation of the revised International Plan of Action of the Second World Assembly on Aging, Madrid 2002.

Population Aging in the Americas

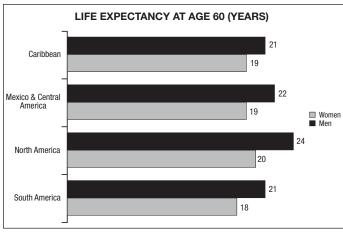
n this document, we use the age of 60 to define the older population. In some countries, such as Canada and the United States, the age of 65 is used to define the population group of older persons since retirement age has traditionally been linked to aging. Notwithstanding, since retirement age varies from country to country, the United Nations has chosen the age of 60 to define and make projections regarding the aging of the world population.



Source: UN: Population Ageing 2002

According to demographers, a population is considered to have aged when the proportion of people age 60 or more exceeds 10 or 12% of the total population. Currently, in North America, more than 15% of the population in Canada and the United States is over the age of 60. In the Caribbean, already 10% of the population is over 60 years old, with Barbados (14%), Cuba (13%), Martinique (15%), and Puerto Rico (14%) having the highest percentage of older adults. In Latin America, only three countries, Argentina, Chile and Uruguay have an aged population. By 2025, 15% or more of the population in at least twenty-two countries in the Americas will be age 60 or more, and in only seven countries, Belize, Granada, Haiti, Honduras, Nicaragua, and Paraguay, will 10% of the total population be 60 years of age or older.²

¹ Plan of Action in Health and Aging: Older Adults in the Americas 1999-2002. Pan-American Health Organization, World Health Organization, WDC. 2 Population Aging (1999). Population Division, Department of Economic and Social Affairs. New York: United Nations.



Source: UN: Population Ageing 2002

This trend has enormous implications for the region and offers important opportunities for the Member States to anticipate and learn from each other's experiences. Taking advantage of this guide and engaging in a dialogue among the countries will provide nations with important tools and insights to develop their national strategies and sustainable policies for the promotion of longer life expectancy with optimum health and well-being.

Conceptual Framework

Vision

A comprehensive system of support that promotes active aging to enhance quality of life.

1. Comprehensive system

A comprehensive system involves a range of supports and services from several public and private sectors that work in concert based on a set of common principles and operational guidelines.

2. Agents of support

There are four important agents in societies that play a crucial role in promoting and supporting active aging. These four agents are:

The individual. The older person plays a vital role in his or her own "active aging." The individual must cultivate good physical health, education, work skills, financial resources, appropriate living environments, and mutually beneficial social relationships. Individuals must seek out and use information to make decisions, adapt personal behaviour to meet the demands of changing circumstances and abilities, and participate in active and meaningful ways. Yet individual responsibility for optimising quality of

life can only be assumed when opportunities, resources, and viable options are available and when the necessary skills for self-care exist (for instance, knowing how to seek and read information regarding health and having basic education regarding health in aging). Furthermore, older persons must encourage new generations to forge a culture that promotes active aging.

Family and friends. Most relationships involving family and friends throughout life are characterized by the mutual exchange of many forms of support and services. As older adults begin to require more care, they tend to receive more services from this informal network, especially from family. Indeed, most of the support received by older persons to maintain their independence and quality of life is provided by family and friends. However, family members and friends may not have the resources, time, or knowledge to be able to provide all the care needed by seniors and family caregivers also require support for themselves and periods of rest.

Community services. The community has the responsibility for creating a caring and supportive environment that helps individuals and families fulfil their needs. Community services comprise a wide range of non-governmental and volunteer agencies or associations, educational institutions, cultural and sports centres, social service agencies, and services offered through churches. The services include both paid and volunteer personnel.

The state. Family and friends, volunteer and non-profit groups, as well as the public and private sectors, play a critical role in ensuring that individuals of all ages have the opportunity to take actions that will enable them to age actively. The state promotes and ensures the active and healthy aging of the population by the following:

- A policy framework that defines the purpose, principles, values, and objectives that sustains the vision of active aging.
- A national plan that defines the goals, gaps to bebridged, timeframes, monitoring indicators, and assessment.
- Sectoral policies and programs: social security, health, education, housing, transportation, sports and physical activities, culture and recreation, justice, and public safety.
- Local government (municipality) policies and programs that complement national and state policies.

3. Active aging

As defined by the World Health Organization, active aging is "the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age³."

4. Quality of life

Quality of life is "an individual's perception of his or her position in life in the context of the culture and value system where they live, and in relation to their goals, expectations, standards and concerns. It is a broad ranging concept, incorporating in a complex way a person's physical health, psychological state, level of independence, social relationships, personal beliefs and relationship to salient features in the environment⁴."

Principles of a Comprehensive System of Support

A comprehensive system of support that promotes active aging is based on the following principles:

- 1. Safety, security, and social support
- 2. Justice, fairness and solidarity
- 3. Dignity
- 4. Independence
- 5. Participation

These principles reflect the fundamental values and underlying beliefs of a comprehensive system of support.

A series of policy questions is proposed to assess the application of the principles. The purpose of the questions is to stimulate the discussion and assessment of the impact of the policies and programs on the current situation of seniors with regard to each principle. The questions can be used for a rapid review of policies, determine if existing programs should continue to be supported, critique proposed policies, guide research and evaluation studies on the impact of programs, or develop a policy response to some issue or need.

1. Ensure safety, security and social support

A comprehensive system of support that promotes active aging would, firstly and at a minimum, ensure that older persons have access to basic needs such as safe water, electricity, nutritious food, physical security, and protection against abuse,

exploitation, and crime. It would ensure that all older persons have a minimum basic income to satisfy the basic necessities of daily life and access to health, social, and legal services that would respond appropriately to their needs and circumstances. Although satisfying universal human needs is a basic requirement of any society, the specific needs of older persons are all too often overlooked.

Questions to assess the level of safety, security, and social support for seniors:

- ☐ Do older persons have access to essential health care?
- ☐ Are there income support programs to ensure that all older persons have access to a basic minimum income?
- ☐ Are there policies that ensure access to basic public services (e.g., safe water, electricity or other energy sources, and nutrition)? Are these policies applied?
- ☐ Are there policies that ensure safe environments and that are adapted for disabled persons at work, in the streets, and in public buildings? Are these policies applied?
- ☐ Are there codes for the construction of safe housing or for the modification of housing for seniors?
- ☐ Is protection provided for older adults against abuse, neglect, or exploitation?

2. Be fair and equitable

A comprehensive system of support that promotes active aging would uphold basic human rights and fundamental freedoms for older persons in all aspects of their lives. A society is fair and equitable when it ensures that all older persons have equal access to a continuum of quality health, social, financial, and legal services and resources regardlessof age, gender, class, race, culture, income, residential setting, and health status, and when it distributes public sector resources throughout all stages of life on the basis of need.

Questions to assess whether the state is fair and equitable with its seniors:

- ☐ Are laws or policies in place and applied to protect the human rights of older persons?
- ☐ Do public services ensure equal access without discrimination on the basis of age, gender, class, race, culture, income, place of residence, and health status?

³ WHO (2002) Active Aging A Policy Framework. Published by WHO Noncommunicable Disease Prevention and Health Promotion Department, Aging and the Life Course

⁴ WHO (1994) Statement developed by WHO Quality of Life Working Group. Published in the WHO Health Promotion Glossary 1998. WHO/HPR/HEP/98.1

- ☐ Do health, social and legal services respond promptly and adequately to reduce risks to the physical safety and psychosocial well-being of older persons?
- ☐ Is the same importance attributed to improving, maintaining, and enhancing the health, social and economic well-being of older persons as it is for the health and well-being of other age groups?

3. Maintain dignity

A comprehensive system of support that promotes active aging would preserve the dignity and self-esteem of older persons. The system would promote a culture of respect for older persons and for their contribution to family, friends, community, and society. Support services and interventions would be flexible and sensitive to the diversity of needs within the senior population as well as respectful of personal privacy and individual values, preferences, and spiritual beliefs.

Questions to assess whether the system protects the dignity of seniors:

- ☐ Is respect for the dignity and heterogeneity of seniors explicitly manifested in social, health, and financial services and are resources allocated to meet individual needs?
- ☐ Are the individual needs, wishes, and values of older persons considered when making decisions that concern them?
- ☐ Are negative stereotypes and misperceptions about older persons corrected and, conversely, are their contributions acknowledged and are positive images of seniors promoted?⁷
- ☐ Is the right of older persons to confidentiality, access to true information about their health, and privacy respected?

4. Foster independence

A comprehensive system of support that promotes active aging would enable older persons to assume the responsibility for maintaining their own health, managing their lives in a community setting in accordance with their preferences, and pursuing opportunities for personal fulfilment. Barrier-free environments would be widely available to accommodate all ability levels. Adequate housing, including housing that accommodates shared living or provides support services and public and/or commercial services and products that are accessible and adapted for varying ability levels would be available. Family and friends would be supported so that they can

continue assisting their older relatives to remain as independent as possible.

Questions to assess whether the independence of seniors is fostered:

- ☐ Are physical settings and environments designed for access by all persons, regardless of the kind or degree of disability they may have?
- ☐ Are the needs of older persons considered in the design and development of products and services for the older consumer?
- ☐ Is information for self-care for seniors made accessible to them and promoted effectively to reach them?
- ☐ Are health care and other service sector workers trained to foster the independence and autonomy of their older clients?

5. Promote active participation

A comprehensive system of support that promotes active aging would seek to involve and integrate older persons in a meaningful way in all aspects of society. It would ensure their access to educational, cultural, spiritual, and recreational resources as well as to opportunities for paid and volunteer work. Physical, social, psychological, or environmental barriers to participation by seniors would be identified and eliminated. The creation of seniors' associations, including public advocacy groups, would be fostered and older persons would be encouraged to become actively involved in the planning, implementation, and evaluation of the public policies and programs that concern them. Efforts would be made to communicate effectively with seniors to inform them about these programs and services.

Questions to assess whether the active participation of older adults is fostered:

- ☐ Are there opportunities for older persons to engage in paid or unpaid work, continued learning, as well as to participate as they wish in social, cultural, and recreational activities?
- ☐ Are the barriers to the active participation of older persons identified and addressed?
- ☐ Do older persons contribute to and participate in the development, implementation, and evaluation of policies and programs?
- ☐ Is information about public programs and services for older persons disseminated broadly and through diverse means?

Operational Guidelines for a Comprehensive System of Support

A comprehensive system of support that promotes active aging would be characterized by:

- 1. Accessibility
- 2. Person centred
- 3. Coordinated
- 4. Shared responsibility
- 5. Equity and sustainability
- 6. Quality

These guidelines are the essential operational elements, or instructions, regarding how to put into practice the principles of a comprehensive system that supports active aging.

1. Be accessible

A comprehensive system of support that promotes active aging would ensure that all resources and opportunities to promote active aging are accessible to all persons. This would be achieved by:

- a) Ensuring that the objectively assessed need is the sole criterion for accessing public services and preventing other factors, such as income, age, race, and place of residence, from determining access to basic services.
- b) Ensuring the involvement of older persons in the development, implementation, and assessment of the programs and services to which they are entitled.
- c) Addressing possible psychological, social, educational or environmental barriers to access, paying particular attention to marginalised groups.
- d) Allocating public resources in an equitable manner to meet the needs of older persons.

2. Be centred on the individual

A comprehensive system of support that promotes active aging would ensure that the individual person be the focal point of service delivery. Services would be responsive and flexible to suit individual circumstances, and would be tailored to the professionally assessed needs of clients and their family caregivers. This would be achieved by:

a) Taking into account diversity (age, gender, culture, race, language, religion, residential setting, as well as personal values) when designing services that respond appropriately to individual needs.

- b) Ensuring that the services be available and flexible to accommodate changes in the needs and capacities of older persons as they age.
- c) Recognising the right of older persons to participate in decisions regarding their care as well as their right to refuse the services that are offered.
- **d)** Considering the older person and his or her family caregivers as partners when making decisions regarding services.
- e) Providing support as needed to family caregivers, including information, practical training, emotional support, financial support, and periods of rest.

3. Provide a coordinated range of services

A comprehensive system of support that promotes active aging would have a diverse range of services offered in a co-ordinated fashion by the various sectors and a multidisciplinary staff. This continuum of support comprises health services, including health promotion (and health education), prevention of diseases, treatment, rehabilitation, and long term and palliative care, as well as subsidies for income, housing, and transportation. Achieving an adequate range of co-ordinated services requires:

- a) Developing a standardised assessment of client needs to provide the appropriate type and level of services.
- **b)** Identifying a core of social, health, and other services to meet the needs of older persons.
- c) Integrating all health services, administratively and financially, including health promotion, prevention of diseases, primary care geared toward the management and control of chronic diseases, permanent and emergency medical care, rehabilitation, and palliative care, so that resources can be deployed flexibly to meet the variable and changing health needs of older persons and to ensure a continuum of care.
- d) Co-ordinating access to economic, housing, social, and transportation programs and services that are important to maintaining the health, independence, and well-being of seniors.
- e) Engaging all public policy sectors to identify gaps in service, adapt existing services, and develop new services to respond to the needs of a growing population of older adults.
- f) Establishing effective information-sharing mechanisms among service providers in the various sectors to facilitate the innovative and efficient use of human, financial, and technological resources.

4. Be a shared responsibility

The development and maintenance of a comprehensive system of support that promotes active aging would be a shared societal responsibility. Strong linkages and partnerships would exist among the four agents of support for active aging: among individuals, families, and community agents; between community agencies or groups and local governments; and among the various government sectors responsible for health and social well-being. All would share a common vision of active aging and would understand the roles and responsibilities of the various agents involved in achieving this vision. There would be opportunities for all to contribute to the identification of needs and to the planning, implementation, and evaluation of programs. Information on issues, concerns, achievements and setbacks would be communicated clearly. Clear lines of communication and responsibility and mechanisms for accountability would be established. The development of shared societal responsibility for active aging can be achieved by:

- a) Involving the key representatives of the four agents of support at the local, regional, and national levels to endorse a common vision of active aging and to identify individual and common roles and responsibilities.
- b) Securing political support from all levels of government for a comprehensive vision with specific plans of action for active aging.
- c) Establishing distinct secretariats or offices responsible for issues related to aging at each level of government, with a mandate and resources to implement action plans within their respective jurisdictions and to co-ordinate their efforts with those of their counterparts.
- d) Providing resources so that seniors organizations, caregiver groups, or community groups may act as advocates for the rights of older persons.
- e) Providing regular and public accounting on the progress and challenges in achieving a comprehensive system of support for active aging.

5. Be equitable and sustainable

The success of a comprehensive system of support that promotes active aging would depend on the responsiveness to the needs of an aging population over time and to the capacity of the system to use resources efficiently, cost-effectively, and in accordance with the needs of the aging population. The long-term viability of this system requires that aging matters be included in the development agenda of the Region. In addition, effective public communication regarding the performance of its programs and their benefits for society as a whole will provide on going public support and make it less vulnerable to changes in political currents. The means to achieve the equity and sustainability of the system include:

- a) Including aging within the development agenda of the country.
- b) Ensuring that reform agendas include an evaluation of these reforms on the well-being of the more vulnerable members of society.
- c) Promoting a human rights agenda as the underlying basis for the financing of aging services and programs.
- d) Establishing mechanisms for ongoing evaluation and public accountability on the quality, efficiency, and cost-effectiveness of services.
- e) Ensuring access to services based on need.
- f) Increasing public awareness of the real benefits to society as a whole of a comprehensive system of support for active aging.

6. Provide quality

A comprehensive system of support that promotes active aging would ensure that services for older persons be based on scientific evidence of effective practices that result in positive outcomes and that would expand the competence of service providers. It would require continuous research to inform program development and assessment. Research and surveillance would form the foundation for decision-making and evaluation in all sectors. Quality can be promoted and ensured by:

- a) Developing a surveillance capacity with reliable indicators to measure and monitor quality, safety, competence, satisfaction, accessibility, efficiency, appropriateness, effectiveness, and continuity of services.
- b) Funding comparative research among the countries on the different aspects of active aging, including multidisciplinary research.
- c) Establishing mechanisms to support the synthesis of research information, the analysis of policy implications, and the dissemination of evidence to decisionmakers to inform the development and evaluation of policies and programs.

- **d)** Developing and disseminating evidence-based standards of professional practice.
- e) Developing training and education for professionals and caregivers from the various sectors and for family or informal caregivers.

Types of Programs and Services in a Comprehensive System of Support

The promotion of active aging requires a multisectoral, multidisciplinary, and co-ordinated strategy to foster an enable participation and equity. For example, important enablers of active aging are living in a safe home with adequate nutrition, having appropriate transportation, a social network, access to information and to health and social services.

The planning process for a comprehensive system of support will need to consider a number of important variables, such as gender, income, marital status, education, cultural values, ethnicity and functional capacity. In addition it will follow an integrated approach to ensure that all parts of the system are contributing to a common goal. The following table illustrates how various sectors contribute to the goal of active aging.

Sector	Relation to the promotion of health and active aging			
Education	• Education and training of personnel for an aging society.			
	• Promotes literacy and life long learning of older persons.			
Housing	• Provides suitable and accessible housing to sustain health.			
Transportation	 Facilitates personal transport to enhance mobility and participation. 			
Labour	 Facilitates the integration of older workers in appropriate jobs. 			
Social and legal	• Guarantees human rights and provides access to basic services for poverty alleviation.			
Health	 Provides a comprehensive system of health promotion, prevention, care and rehabilitation programs. 			

The specific types of programs and services to be developed in a given location will respond to the functional capacity and needs of older persons. Therefore, the planning process requires epidemiological and functional indicators of seniors, an understanding of the resources available in their social network and human resources gerontologically trained.

In addition, the integrated and coordinated system of support will provide a continuous and flexible system since seniors can change from a state of functional independence to one of frailty or dependence and vice versa. Finally, the concept of active aging also includes the right to receive necessary palliative care to manage pain and maintain the best quality of life possible in the final stage of life.

Therefore an integrated and comprehensive system would include those supports that ensure optimum care and quality of life for:

Independent seniors

The system will provide support to maintain their independence, care for their health, prevent diseases, and manage chronic conditions. Incentives and opportunities to participate in their own physical, mental, social, and financial development and to continue engaging in work or volunteer activities.

Seniors with disability

The system will provide community-based support to maintain the greatest possible independence, rehabilitate or maintain function, support family caregivers, manage chronic diseases, and stimulate social participation and physical and mental activity.

Dependent seniors and seniors near the end of life

The system will provide day services to avoid premature institutionalisation and to support the family, home services (social, health, and family support) with a multidisciplinary team of caregivers, palliative care including symptom and pain management. Regulated assisted living residences with standards of quality of care for people who cannot live at home. Pastoral services to tend to the spiritual needs of the person in the final stage of life.

PROGRAMS FOR INDEPENDENT SENIORS

financing structures to promote the well-being and health of seniors while continuing to improve the health and well-being of the young Issues: Social and economic development initiatives and health programs continue to focus on the needs of the younger population. The speed of demographic and epidemiological changes requires that the Member States prepare human resources, reorient their services, and promote new population with a life cycle perspective. **Public policies for active aging** ensure and promote the rights of older persons; act to remedy inequities in health; and promote specific measures to improve access to basic services including personal safety and protection against age discrimination.

Supports to be developed by the various sectors

НЕАГТН	1. Health promotion including physical and mental health.	2. Primary prevention and management of acute and chronic	conditions. 3. Senior-friendly	community health centres.	4. Support groups for seniors and teaching	or sear care sams. 5. Immunisation	programs for seniors.
SOCIAL AND LEGAL	1. Promotion of a positive culture of aging in society.	2. Social service information and referral.	3. Nutrition programs.	4. Recreational, physical activity and cultural programs	5. Associations of older	persons, sernor centres or clubs.	6. Legal protection against abuse, mistreatment, or financial exploitation.
WORK/SOCIAL SEC.	 Employment programs for seniors. 	Flexible employment programs for older workers.	3. Co-operative or small business	loans for seniors. 4 Retirement based	on assessed competency, not age.	5. Sustainable pension systems guaranteed	by the state.
TRANSPORTATION	 Accessible and senior friendly public transportation. 	2. Older driver assessment and training programs.					
HOUSING	1. Housing renovation and repair for seniors.	2. Accessible housing for low- income seniors.	3. Group homes, or foster homes and shelters for seniors	in extreme poverty lacking family			
EDUCATION	1. Senior literacy and health education.	2. Training or retraining of senior for paid and of senior for paid work.	3. Teacher training for the education of seniors.	4. Training for health	services personnel to work with seniors.		

PROGRAMS FOR SENIORS WITH DISABILITY

Issues: The needs of seniors with sensory deficits, physical or mental disabilities, or difficulty performing some basic activities of daily living, require programs and services created with the specific goal of enhancing participation and supporting the individual at risk for loss of autonomy.

Public policies for active aging ensure and promote the rights of older persons with disabilities; act to remedy inequities in health; and promote specific measures to improve access to the basic services according to needs, including personal safety and protection against abuse and mistreatment.

Supports to be developed by the various sectors

НЕАГТН	1. Management of chronic conditions.	2. Subsidies for basic medications.	3. Home health care.	4. Screening and		depression and dementia.	5. Programs for the prevention of falls, malnutrition, and
SOCIAL AND LEGAL	1. Legal protection for persons with disabilities.	2. Co-ordination and management of community services	3. Day services for older	persons in the	premature institutional	4. Home-delivered	care, and community based rehabilitation.
WORK/SOCIAL SEC.	1. Opportunities for older persons with disabilities to continue contributing	in as much as it is possible.	2. Creation of employment	programs for		assisted living facilities.	
TRANSPORTATION	1. Transportation vehicles and services adapted for persons with disabilities.	2. Accessible transportation	programs to enable persons with	disabilities to	social and productive		
HOUSING	1. Adaptation of housing for the needs older persons with disabilities.	2. Design of assisted living alternatives	for persons with disabilities.				
EDUCATION	1. Educational material 1. Adaptation of designed for people housing for the with poor vision or auditory problems or disabilities.	low literacy. 2 Training for health	care and social assistance personnel	to work with people with physical or	mental disabilities.	3. Training for caregivers.	

complications. drug-related

PROGRAMS FOR DEPENDENT SENIORS AND SENIORS NEAR THE END OF LIFE

The development of long-term services requires the creation of new programs and services adapted to the needs and desires of older adults that can be sustained with available resources. In the final stage of life, the older patient needs quality palliative care at home or in a long-term care Issues: Frail or dependent seniors need long-term care in a home or home-like environment, surrounded by their memories, family, and friends. institution in order to avoid long and unnecessary hospitalisation. Public policies for active aging also include persons who have lost the capacity of performing basic activities of daily living. The policies and programs ensure and promote the rights of older dependent persons; they act to remedy inequities in health; and they promote specific measures to provide long term care for persons who need it and palliative care for older patients in the final stage of life.

Supports to be developed by the various sectors

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