INNOVATION IN AGEING FOR REGIONAL COMMUNITIES: PLANNING FOR PRODUCTIVE AGEING IN THE WIDE BAY/BURNETT REGION OF QUEENSLAND

Jeffrey Soar[1], S Garlick[2] , P Waterman[2], R Gururajan[1]

[1]University of Southern Queensland, QLD
[2]University of the Sunshine Coast, QLD

The purpose of this paper is to present and invite comment on a Program of Innovation in Ageing for Regional Communities. This research-in-progress has been developed as a product of collaboration by researchers from two universities with campuses in the Wide Bay/Burnett region of Queensland (the University of the Sunshine Coast and the University of Southern Queensland). This region has one of the fastest growing populations of retirees and is one of the poorer performers economically. The research was informed from information gathered in consultations with stakeholder organisations. The aims of the Program are to assist regional communities in better understanding and addressing increases in the percentage of older people in their populations including the use of technologies. GIS (Geographical Information Systems) are a key tool used for understanding the spatial context of older people.

The focus is on practical steps of experimentation, demonstrator projects, evaluating technology, development and implementation of standards, change management, and the development of rigorous financial cases for investment incorporating how benefits will be realised.

Introduction

The 2003 State of the Regions Report (ALGA 2003) presented a demographic profile for so-called retirement-oriented 'life-style' regions as typically being in the lower end of socio-economic performance in terms of employment and income growth, with significant rates of population growth in older ages, rapidly rising housing prices, and heavy demand for infrastructure and community services.

Increasing numbers of retirees can have an adverse impact on the finances of local government. These residents may be entitled to concessions on rates and other charges. They may also consume, need or demand increasing services. Consequently there are a number of direct policy and practice drivers for the project. They include:

❖ How to support regional communities impacted by high increases in the numbers of senior aged Australians in their populations. There is a need to explore approaches to balancing infrastructure and service provision with opportunities to expand the required revenue streams.

❖ How to enhance the health and well-being outcomes of seniors in ways that recognize their knowledge and expertise in practical and meaningful ways

and to build a stronger sense of personal gain through community involvement.

❖ How to evaluate the potential benefits of technologies in providing support for older people. This potential includes managing activities of daily living, supporting families as carers and advocates through technology such as remote monitoring, improving access to service delivery information, enabling clinicians to share care plans and better coordinate care. There is potential through technology to support ageing in place and delaying or avoiding moves to institutional care. Savings are anticipated from applying technology to foster prevention and early detection of the onset of disease or disability, when treatment is often cheaper and more effective.

The focus will be on practical steps of experimentation, demonstrator projects, evaluating technology, development and implementation of standards, change management, and the development of rigorous financial cases for investment incorporating how benefits will be realised.

Project focus

The focus is on the Wide Bay/Burnett region of Queensland which has one of the fastest growing populations of retirees and is one of the poorest regions in the state (DOTARS 2002). This research has also arisen as a result of a growing collaboration and a strengthening partnership between researchers in ageing at the University of Southern Queensland (USQ) and the University of the Sunshine Coast (USC). USQ hosts CAAIR, the Collaboration for Ageing and Aged-care Informatics Research. The expertise contained in that centre is complimented by research expertise in regional development issues that USC has in its Institute for Sustainability, Health and Regional Engagement (iSHaRE). The first steps of the research have been undertaken in the form of extensive consultations with local government authorities and other entities considered to be stakeholders.

The aims are to assist regional communities in addressing increases in the percentage of older people in their populations, moves towards enhancing the independence of older people and expectations of more care to be delivered in the home and in the community.

The general principles include considering approaches for engaging the enterprising capacity of an active ageing population to achieve a range of individual, institutional, regional objectives through processes of learning and innovation, and exploring the development and application of innovations and technologies which will be essential as enabling infrastructure for these changes.

Demographic context

The Sunshine Coast and Wide Bay regions are characterised by:

❖ rapid population growth, part fuelled by in-migration of 'life-style seeking' seniors. The Sunshine Coast and the Wide Bay regions both have 28 percent of their population in the 55 years and older category compared to a National figure of 21 percent;

❖ a relatively low socio-economic performance (unemployment, employment growth, income levels) that reflects the ageing end of the demographic

structure as well as industry restructuring. The *State of the Regions* (2003) report ranks indicators of these measures for the two case study regions at between 40 and 50 out of the total of 64 metropolitan and non-metropolitan regions Australia-wide. This situation is similar in other 'lifestyle' regions;

❖ a relatively high level of 'creative skills', as measured by the creativity index in the State *of the Regions* report, 2002. The 2002 State of the Regions report for example gives a creativity index ranking for the Sunshine Coast region of 15, just in front of another 'lifestyle region' in the Richmond Tweed region of NSW, and only just behind regions in Melbourne, Sydney, Brisbane and Adelaide.

❖ a high level of latent social capital of an enterprising kind that is inherent in the educational and professional attainments and experience of the seniors in the population.

These characteristics are becoming increasingly common to many other 'lifestyle' regions throughout Australia where the current realised productive contribution of active seniors falls short of their impact on community services and infrastructure.

Government Policy Context

The 2003 *State of the Regions Report* (ALGA 2003) highlights that "…the proportion of population of retirement age (55-69) was particularly high in the currently fashionable retirement areas: Wide Bay Burnett, the Sunshine Coast and the NSW Mid North Coast." (p.4.36).These trends are confirmed in other demographic analysis such as that carried out by Salt (2003) in his *The Big Shift* report. The *State of the Regions* (2003) report also notes the significance of senior migration on regional viability and local government capacity to provide infrastructure and human services, particularly with cost-shifting to local government from the other spheres of government, saying "Governments that do not have strong population growth in the under 55 age group are most seriously impacted in terms of their resourcing capacity" (p. 4.59).

The solution offered in the *State of the Regions* report is one that relates to adjusting the Financial Assistance Grants formula to take into account the impact of an ageing population at the local government level. An alternative strategy that is being explored by this paper's authors seeks to build underlying economic capacity on the back of the expertise of seniors within a framework of innovation, learning, enterprising and engagement. In other words we suggest these retirees have a potential economic worth of an enterprising kind separate to their declining economic worth as consumers and investors.

Recognising the significance for local government capacity of an ageing population in some regional areas, the ALGA issued a population ageing action plan (ALGA 2004) that specified principles and objectives to help local councils plan for an ageing population. The action plan followed an earlier ALGA discussion paper *An Older Australia: Identifying Areas for Local Government Action* (2004).

The ALGA action plan specified four priority areas, and a number of strategies, including building awareness of the ageing population issue in local government, encouraging local government planning action, fostering partnerships to support a collaborative approach to population ageing, and

improved access to regional information on population change. We believe this project provides a strategy to achieve this action plan.

More broadly in relation to the ageing population, both the Federal Government and the Queensland State Government have issued policy and strategic planning statements that focus on the health and well-being aspects of seniors, including the 'active' seniors group which are the target group for this project. The Commonwealth Government's *National Strategy for an Ageing Australia: An older Australia challenges and opportunities for all* (2001) talks about opportunities for Australians to make a lifelong contribution to society and the economy, including through training and professional development and lifelong learning for mature age workers and learners. (p.2). The Strategy says that for Australia to "…achieve sustained economic growth, there will have to be a continuation of current productivity growth and better utilization of the skills and experiences of mature age workers." (p.17).

At a state level, the Queensland Department of Community Services issued a 1999 policy document (*Our Shared Future: Queensland Framework for Ageing 2000 - 2004)* that specifies five principles and strategies that seek to improve a coordinated approach to the design and provision of aged services. Importantly for this project, the policy paper recognizes the contribution seniors can make, through knowledge and learning, to society, culture and the economy of their communities. This was also recognized in the Queensland Department of Families report *Ageing: Myth and Reality* (2002 p19). However this contribution is often seen in terms of voluntary assistance in the community, as unpaid help and assistance with families.

However what we are concerned with in this project is not to see active seniors as a 'free good', but something more fundamental that produces enterprising outcomes that are based on knowledge and expertise within a stimulating innovative learning environment. This is consistent with the report's finding that "…Mature age workers have been shown to have experience, a great deal of practical as well as theoretical knowledge…" (p.33).

The policy agenda of non-government representative organisations like National Seniors (2005) reflects input from its broad membership and covers health, housing, employment, education, travel, information, taxation, legal matters, safety, and volunteers. The present project is consistent with these policies as they relate to employment and education.

Spatial policy context

However none of these policy documents spell out a spatial policy perspective, even though there are quite clear spatial differences in impact as the State of the Regions (2003) report and Salt (2003) have demonstrated. Nor do these policy and strategy documents identify how the health and well-being of this active demographic, and the communities in which they reside, can be enhanced through meaningful enterprising initiatives that draw on the accumulated knowledge and expertise of these people and the learning and research frameworks of education institutions.

The second area of literature important for this project concerns the growth and competitiveness of Australian regions, and in particular those regions that are at the forefront of 'lifestyle-seeking' senior in-migration population growth. While competitiveness and equity are the two principles that are meant to underpin policies relating to regions, the strategies and programs put forward

to address them are generally vague in the way these objectives will be met. They tend to rely on a range of 'off-the-shelf' popular approaches (such as social capital, learning regions, aggregate demand, 'institutional thickness', industry clustering, etc) that are unsubstantiated in their evidence[5].

Research suggests there has been an increasing concentration and divergence in growth between metropolitan and non metropolitan regions in Australia over the last two decades that indicate many of the supposed drivers for regional growth, explicit in the institutional embeddedness approach to regional development theory, policy and practice, are either ineffective or have negative impacts (Plummer and Taylor 2001, Garlick and Waterman 2005).

From the analysis, human capital, access to high technology, and industry specialisation are seen as the main positive drivers.

The analysis suggests an approach to regional growth and competitiveness that focuses on the growth transmission process, and in particular on the degree to which it can engage with the enterprising aspects of a region's human capital (Garlick and Waterman, 2005), is the best way forward. The regional analysis, covering 94 Australian regions, includes five sub-regions targeted for the case study analysis for the Sunshine Coast and Wide Bay regions for this project. They include Caloundra, Maroochydoor, Gympie, Hervey Bay and Maryborough.

Technology context

Supporting productive ageing will be difficult to achieve without the adoption of enabling technologies and other innovations. There is a need for the potential benefits of technologies in providing support for older people to be evaluated (Soar 2004, Young 2004). This potential includes technology as prostheses to support productive ageing, managing activities of daily living, supporting families as carers and advocates through technology such as remote monitoring, improving access to service delivery information, enabling clinicians to share care plans and better coordinate care. There is potential through technology to support productive ageing and in extending independent living.

Approach

A first step of this project was undertaking GIS (geographic information system) research to better understand demographics of ageing in the Wide Bay/Burnett region in comparison with other LGAs of Queensland. The GIS research focused on the baby boomers in Queensland as these are the most numerically-significant age cohort that will have impacts for ageing and aged care. Of particular interest will be the first of the boomers, that is, those born in 1946. These are the oldest of the boomers, likely to be the first to retire and to make life-style choices that may indicate patterns that the rest of the boomers may follow. For this particular study no differentiation was made between baby boomers and that is a topic of further planned research.

Using GIS technology, the spatial location of 1946-1964 born baby boomers in Queensland and their migration over time were mapped and analysed based on the census data of 1991 and 2001 (Liu and Soar 2005). Results show that using 2001 data, baby boomers were well represented in the southeast region of

Queensland, including Brisbane, Gold Coast, Ipswich, Logan, and Redland Local Government Areas (LGAs); boomers were also well-represented along the eastern coast of Cairns, Mackay, Townsville and Thuringowa LGAs. The comparative research of the two census data also shows areas of baby boomer gain and loss, which clearly demonstrates the spatial migration of baby boomers over the decade (Figure 1 and Table 1).

Figure 1: A comparison of the change of baby boomers to total population change between 1991 and 2001 in Queensland

(Data Source: CDATA 2001 and CDATA 1991)

Table 1: Baby Boomer Change Patterns

	Number of LGAs	%
1. Both increased; boomer increased faster	23	18.25
2. Both increased; boomer increased slower	41	32.54
3. Population decreased, but boomer increased	2	1.59
4. Both decreased; boomer decreased faster	30	23.81
5. Both decreased; boomer decreased slower	5	3.97
6. Population increased, but boomer decreased	25	19.84
Total	126	100.00

Figure 1 shows for LGAs in Queensland:

1. those LGAs where the general population increased but boomers (born between 1946-1964) increased faster than the general population; these were exclusively on coastal and South Eastern areas of Queensland.

2. LGAs where both the general population and boomers increased but the rate of boomer increase was lower than the general population; this was an interesting mixture of remote and SE locations, no doubt requiring further analysis and research.

3. LGAs where the population decreased but boomers increased. There were only two LGAs in this category, both in the inland regions not too distant from major cities (Brisbane and Rockhampton)

4. Population and boomers both decreased but boomers decreased faster; large areas of central Queensland experienced a decrease in population over this period with boomers leaving these regions at a faster rate than the general population decline.

5. Both decreased; boomer decreased slower. Two of the four LGAs in this category are located in central Queensland while the other two lie alongside the Wide Bay/Burnett region which saw rapid population growth.

6. Population increased, but boomer decreased; some of these LGAs are in far west and far north regions where small populations can make data analysis challenging and locations such as mining camps can distort data.

Overall the populations of large parts of Queensland are declining and that is a matter for further research. For the purposes of this paper this data analysis supports popularly-held perceptions that boomers are reducing in numbers in far west, far north and central Queensland and increasing in numbers in coastal and hinterland regions.

Regional growth and competitiveness

Analysis of regional growth and competitiveness over the period 1984 to 2002 (Plummer and Taylor 2001, and Garlick and Waterman 2005) for 94 Australian regions identifies the circumstances for the five sub-regions in the study area for this project.

The sub-regions in the project study area have some of the lowest rankings for economic growth. The presence of the key human capital driver is very poor, while the access to high technology driver is also relatively poor. Industry specialisation is relatively good for the Sunshine Coast and for Hervey Bay, while the regions rank at around the middle for the degree of institutional intervention, with the Sunshine Coast and Hervey Bay doing better against this driver. This points to a situation where a failure to engage the region's human capital shows up in poor economic growth. Any strategy for regional development in these places therefore should focus on the way human capital is engaged in the growth transmission process (Garlick and Waterman 2005).

Regional development transmission

Two regional development transmission concepts stand out from the research work on regional growth and competitiveness (Plummer and Taylor 2001, Garlick, 2003). These concepts are:

(a)   enterprising human capital; and
(b)   regional engagement.

'Enterprising' people in the regional development context we define as those that take an idea and turn it into an outcome using the regional attributes at their disposal. They are people that understand the way markets operate, can access finance, can see an opportunity, understand risk management, without necessarily being risk takers, and can mobilise resources, particularly teams, to good effect. They are ostensibly outcome-oriented people, and they are an undeveloped resource that exists across demographic groups in most communities. Developing an enterprising culture in the regional context is seen as something that needs to be taken on by the education system – not the training system – as it is about behavioral processes of thinking and acting that have long run implications.

Regional engagement in this context we refer to as the mutual and creative connectivity that can be formed by the region's human capital, to achieve accumulated outcomes that otherwise might not be possible when attributes are taken in isolation or are constrained by business or institutional structures. It is, in a sense, a framework of mutual cooperation that surrounds the enterprising human capital in the region. It is a concept of regional *involvement,* where participants are accepted on equal terms to exchange knowledge as learners.

Essential elements

In implementing this model, the project will encompass the following nine broad streams of activity:

a) *Harnessing the ideas, creativity, enterprising skill, knowledge and experience of the regions' seniors.* A knowledge audit of seniors will not only form an electronic directory for regional access, but importantly will be the basis for dialogue to identify complimentary and reinforcing ideas that can be progressed through processes of learning, innovation and enterprising action in collaboration with the two universities in that region (University of the Sunshine Coast and the University of Southern Queensland – Wide Bay campus) and other

groups both inside and outside the Sunshine Coast and Wide Bay regions.

b) *Identifying the regions' priority directions to ensure a viable community into the next fifty years based on learning and knowledge creation and exchange.* The universities will facilitate dialogue with key groups, including enterprising seniors and business, across a broad spectrum in the community to identify agreed long term directions and highlight ventures where collaborative partnerships can be made between higher education research, teaching and learning, regional stakeholder groups, the knowledge and contribution of the regions' seniors, and outside funding bodies (grants, equity investment, etc). These coalitions of focused interest and expertise will evolve across the economic, social, cultural and environmental spectrum as the ideas take on an enterprising dimension.

c) Idea incubation and enterprising processes. The University of the Sunshine Coast Innovation Centre and business incubator will be a focus for this phase of the project. The project will build on the Centre's screening process for identifying ventures worth providing incubator and investment support to, and will also include non-business enterprising ventures of benefit regionally across the social, cultural and environmental spectrum. The Innovation Centre, established in 2001, has a number of start-up companies in residence and a relationship with a $20m pooled development fund to seed start-up, early expansion and later stage business expansion.

d) Supported learning framework. The project will encourage changes in the design and delivery of university teaching, learning and research programs to better support the enterprising initiatives being pursued by active seniors in association with other agents and agencies.

e) Input to institutional policy and practice. Experience from the project will input into government and institutional policy, practice, and service provision and program delivery to enhance seniors', regional community, and university outcomes.

f) A greater contribution of seniors to professional and practical knowledge. This will occur through expertise download and hands-on transfer of skills to others, for personal and community gain.

g) Benchmarking for improvement. An effective self-assessment measurement regime will be put in place to enable regular processes of improvement in the various aspects of the project from the perspective of institutions and seniors. The regime will be based around principles of collaboration, learning, and review.

h) *Disseminating 'good practice'.* The project will have a number of benefits for seniors in other communities as well as other universities and their regional communities wanting to develop a meaningful and purposeful partnership with the active and productive ageing. This phase will include:
   ❖ A report detailing methodology, impediments, opportunities, processes, and results achieved that will provide confidence for other regional communities and their universities, where there

is an underutilization of the capabilities of seniors, to embark on their own enterprising engagement initiatives.

❖ A self-assessment benchmarking manual for use by universities in partnership with their communities.

❖ A National conference, web site and various local media reports on a regular basis, academic conferences (health and ageing, regional development, industry development, university development, etc).

i) **Research training.** The project will comprise a stream of research topics (see diagram) that will provide a range of research training opportunities through the two universities involved in the project.

Implementation

Each topic to be covered either on a regional basis or in terms of the key thrusts of the study (i.e. regional growth dimension, active seniors' dimension, university viability dimension) will be a field of inquiry and action. Each will include a number of questions or issues, determined through the stakeholder consultation phase of the project (phase one). There will also be a number of inter-linked topics, such as:

❖ the *inter-regional* comparisons in relation to regional growth and development, the active and productive ageing, and the engagement by the university; and

❖ the *intra-regional* comparisons in relation to connections between regional growth and competitiveness, the role of the active and productive ageing, and the role of university in the engagement processes.

The study team anticipates that the key products to be derived from the project will include the following.

❖ Enterprising outcomes in each region, such as new business start-ups, social, cultural and environmental initiatives.

❖ New knowledge in the form of published academic research papers, completed higher degrees and associated publications and other formal and publications of community benefit and interest.

❖ Personal benefits for the active and productive seniors, such as new learning, new interests, new business and other enterprising associations as well as health benefits from a sense of community contribution.

❖ Education products in the form of, for example, new teaching and learning and research programs, partnerships, services, infrastructure.

The study teams have approached a wide range of potential public, institutional and private sector partners for the project, including Government (Federal, State and Local), Local government associations, Industry (small business associations, finance industry), Regional development organizations, Universities, Seniors groups , Service groups, Health organisations, Technology suppliers, and Aged Care and Community Care industry peak bodies.

Senior participation

An issue to be explored is whether seniors themselves will support and adopt the concepts of this program. The research commenced with wide consultation with stakeholder groups, policy makers and implementers of programs at all levels of government. The consultations included seniors' bodies such as U3A

(University of the Third Age), Pensioners and Superannuates League and the RSL. Acceptance will be tested as part of the project itself through in-depth facilitated workshops. Feedback gathered to date from consultation indicates that seniors want to participate productively and actively in the education and labour markets.

Summary

This project offers an approach to engaging active seniors as a key human resource in the growth prospects of those regions currently attracting increasing numbers of so-called 'lifestyle'-seeking retirees. It is an approach based on realizing the enterprising capabilities of this demographic within a framework of learning and innovation using the university as a facilitating agent.

In this regard it goes beyond many current strategies that see active seniors as employees or as unpaid and charitable help in the community and provides an important strategy to assist in local, State and Federal government strategies to address a number of economic, social and cultural issues associated with an ageing Australia. The approach also offers an additional strategy to boost regional development outcomes, rather than simply view older age population growth as an additional cost that needs to be compensated for. Finally, it offers a strategy for university viability in such locations.

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