



# EAPS/MAP2030 Workshop on the Future of Family Support for Older People

*London 15 May 2009*

***“An Overview on the assisted living  
residences for seniors after the passing of the  
Spanish Dependency Act 2006.”***

***Dr. María Luisa Gómez Jiménez, Phd***  
*Associate Professor*



Facultad de Estudios Sociales y del Trabajo

University of Málaga



# OUTLINE

- **The challenge of an aging society (Europe and USA, the references to Spain)**
- **Living arrangements for seniors**
- **Status of the stock of housing: owners or renters, old or new units?. Options and opportunities**
- **The public authorities response: THE PASSING OF THE SPANISH DEPENDENCY ACT.**
- **Seeking alternatives**



# **THE INCREASING CHALLENGE OF AN AGING SOCIETY**

## Demographic evolution of seniors citizens 1900- 2050

Años	Total España	65 y más años		65-79 años		80 y más años	
	Absoluto	Absoluto	%	Absoluto	%	Absoluto	%
1900	18.618.086	967.754	5,2	852.389	4,6	115.365	0,6
1910	19.995.686	1.105.569	5,5	972.954	4,9	132.615	0,7
1920	21.389.842	1.216.693	5,7	1.073.679	5,0	143.014	0,7
1930	23.677.794	1.440.739	6,1	1.263.626	5,3	177.113	0,7
1940	26.015.907	1.699.860	6,5	1.475.702	5,7	224.158	0,9
1950	27.976.755	2.022.523	7,2	1.750.045	6,3	272.478	1,0
1960	30.528.539	2.505.165	8,2	2.136.190	7,0	368.975	1,2
1970	34.040.989	3.290.800	9,7	2.767.061	8,1	523.739	1,5
1981	37.683.363	4.236.724	11,2	3.511.593	9,3	725.131	1,9
1991	38.872.268	5.370.252	13,8	4.222.384	10,9	1.147.868	3,0
2001	41.116.842	7.037.553	17,1	5.404.513	13,1	1.633.040	4,0
2005	44.108.530	7.332.267	16,6	5.429.048	12,3	1.903.219	4,3
2010	45.311.954	7.785.480	17,2	5.490.621	12,1	2.294.859	5,1
2020	48.664.658	9.345.955	19,2	6.338.532	13,0	3.007.423	6,2
2030	50.878.142	11.684.570	23,0	8.025.109	15,8	3.659.461	7,2
2040	52.540.936	14.569.813	27,7	9.886.602	18,8	4.683.211	8,9
2050	53.159.991	16.387.874	30,8	10.464.874	19,7	5.923.000	11,1

# Number of Seniors MEDIAN AGE, SPAIN 1900-2050

YEAR	AGE
1900	24
1910	24
1920	24
1930	25
1940	26
1960	29
1970	30
1981	30
1991	33
2003	37
2020	43
2050	47

*Fuente: INE:INEBASE: Cifras de población. Población según sexo y edad desde 1900 hasta 1991. INE, 2004.*

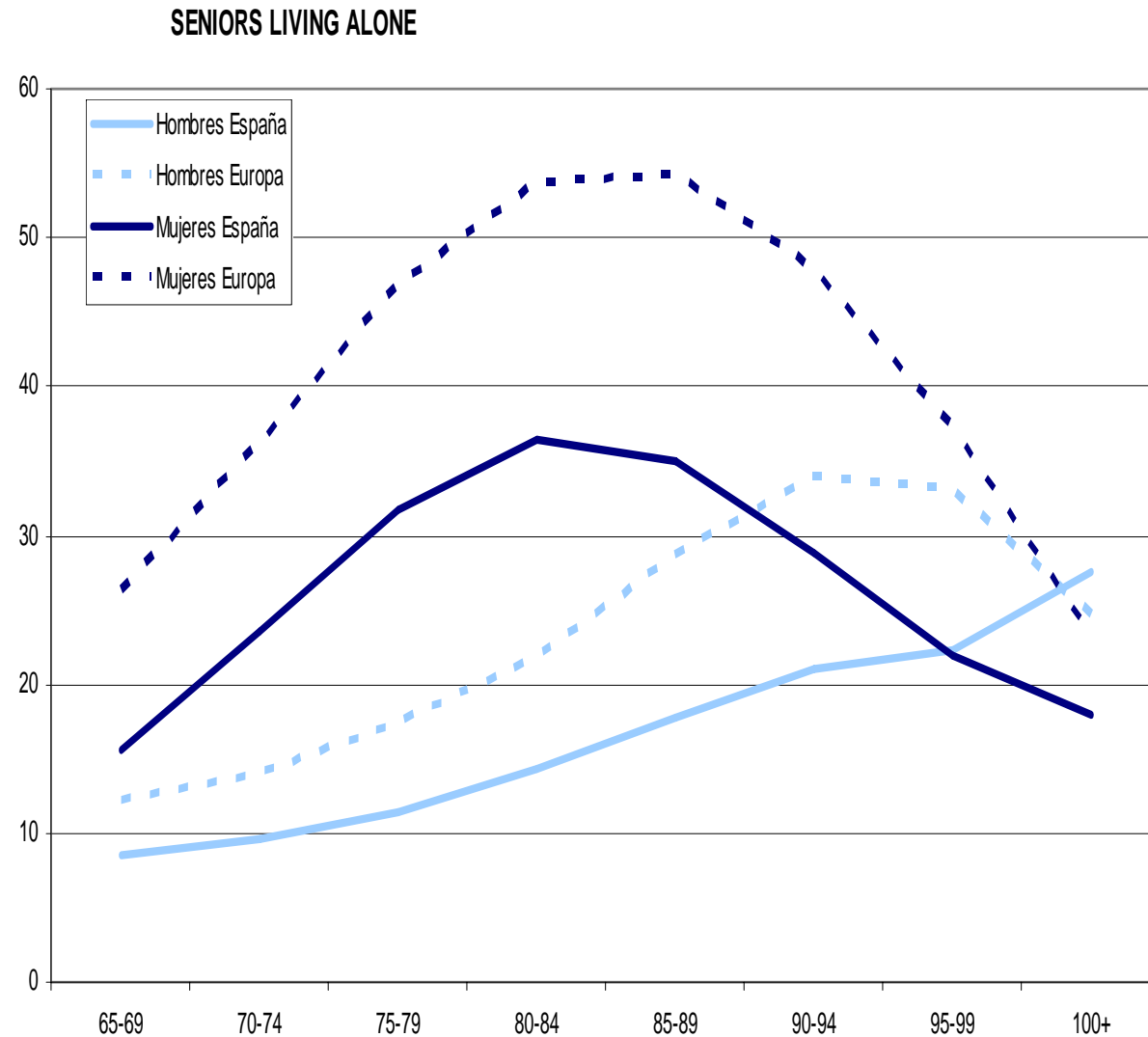
*2003: INE:INEBASE: Revisión del Padrón Municipal de Habitantes a 1 de enero de 2003. INE, 2004.*

*INE:INEBASE: Proyecciones de la población calculadas a partir del Censo de Población de 2001. INE, 2004.*



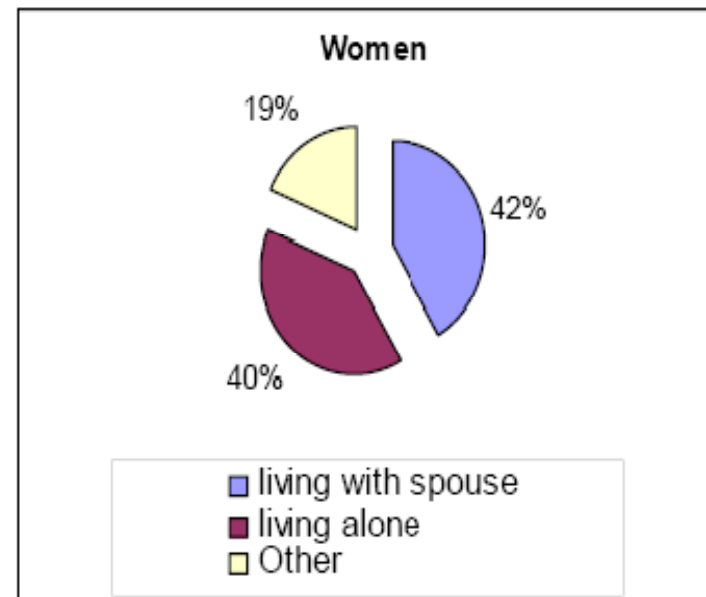
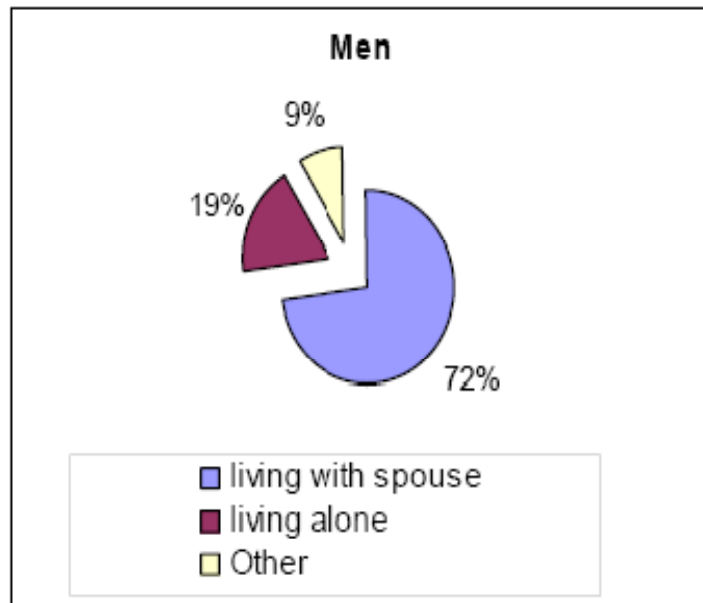
# **LIVING ARRANGEMENTS FOR SENIORS**

# Seniors living alone




Source: EUROSTAT - Database, Population and social conditions. Population. Census. National level census 2001 round. (<http://epp.eurostat.ec.europa.eu>)

# Living Arrangements for Persons 65+: 2004



*(Based on data from U.S. Bureau of the Census including the 2004 Current Population Survey and the 2003 American Community Survey. See: March 2004 Current Population Survey Internet releases, Detailed Tables. and "The 65 Years and Over Population: 2000, Census 2000 Brief, October, 2001" as well as other Census 2000 data and unpublished data from the Centers for Medicare and Medicaid Services.)*

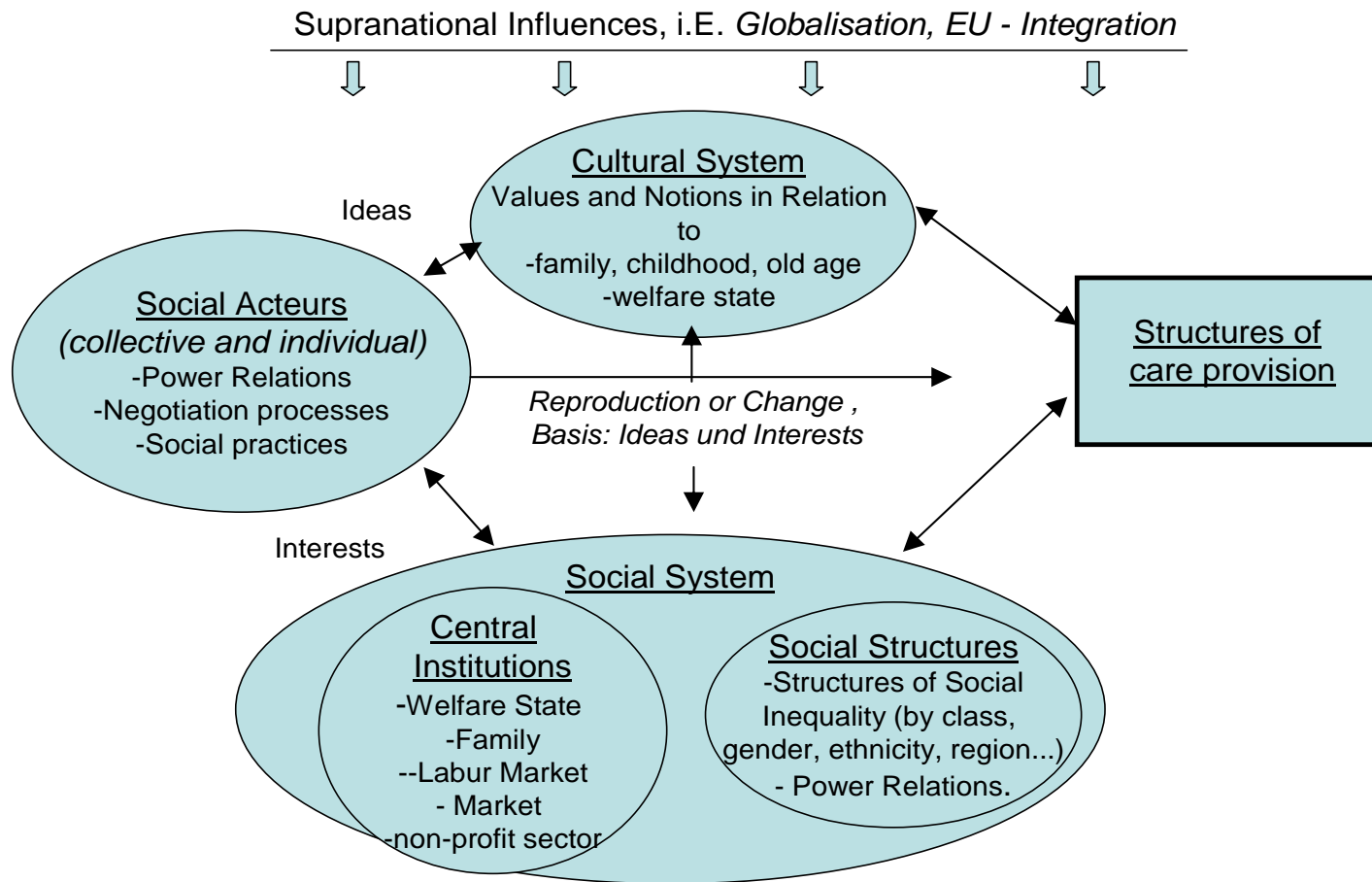




# EXISTING SOLUTIONS FOR SENIORS IN SPAIN

- THE INFORMAL CAREGIVERS AT HOME : FAMILY , RELATIVES.
- THE EXISTENCE OF RESIDENCES OR HOME FOR THE ELDERLY AND DAY CARE CENTER (PUBLIC AND PRIVATE ONES)
- THE GENERAL SOLUTION OF PUBLIC HOUSING INSIDE THE SPANISH HOUSING PROJECT
- THE ARISE OF ASSISTED LIVING FACILITIES IN SPAIN AS IT'S DEVELOPED IN US

## Graph: Structures of care provision within the care arrangement



Source: Birgit Pfau-Effinger, *Development paths of care arrangements in the framework of family values and welfare values*, in: *ibid./Geissler, Birgit (eds.), Care and Social Integration in European Societies*, Bristol: Policy Press 2005, pp. 21-45

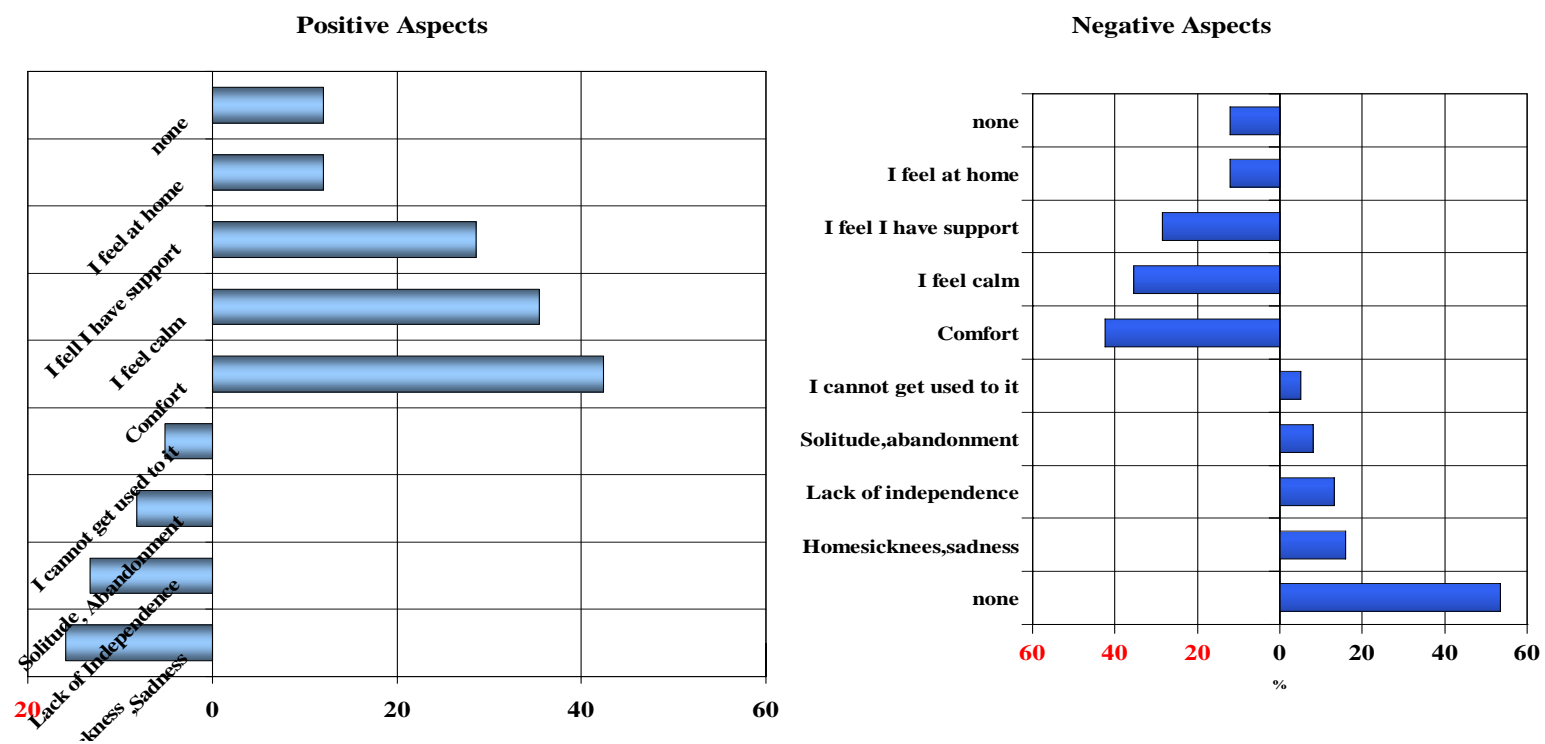
# HOMES FOR THE ELDERLY OR RESIDENCES



Main reason for one Spanish senior to live in a residence according to the age, 2004, male and female.

	Age		Total
	Under 85 years old	85 years and over	
To Avoid being alone	31,7	37,4	34,5
Because I couldn't keep the house	4,0	4,7	4,3
For a better care	12,0	9,4	10,6
To be with my partner(husband or wife)	4,3	4,7	4,5
To Avoid problemes with my family	5,3	12,6	8,9
To have more free time	0,3	0,7	0,5
To be safe in the future	0,7	1,4	1,0
I cannot take care of myself	12,7	7,6	10,1
I didn't have another solution	2,7	2,9	2,7
I have no family	2,7	2,5	2,6
For Health reasons	13,7	8,6	11,3
Because my family can not take care of me	7,3	5,0	6,2
Because of money	0,3	0,0	0,3
Other reasons	1,0	0,4	0,7
He/She doesn't know	0,3	1,4	0,9
He/she doesn't answer	1,0	0,7	0,9
N	300	278	583

## POSITIVE AND NEGATIVE ASPECTS OF ENTERING A HOME OR RESIDENCE, ACCORDING TO RESIDENTS OPINION, 2004



Fuente: Observatorio de Mayores-IMERSO, *Encuesta sobre Condiciones de Vida de los Mayores en Residencias*, Septiembre-Octubre 2004.

## RESIDENCES SERVICES IN SPAIN

### EVOLUTION OF TOTAL NUMBER OF SPACES AND CENTERS ACCORDING TO THE TITLE

1994-2004

Years	Number or Residences			Nº of rooms in the Residences		
	Title	Title	Total	Title	Title	Total
	Public	Private		Públic	Private	
1994	618	2.084	<b>2.702</b>	53.161	110.177	<b>163.338</b>
1999	484	2.703	<b>3.187</b>	51.413	146.945	<b>198.358</b>
2000	537	3.445	<b>3.982</b>	56.169	150.406	<b>206.575</b>
2001	573	3.616	<b>4.189</b>	56.450	160.133	<b>216.583</b>
2002	640	4.160	<b>4.800</b>	61.374	178.387	<b>239.761</b>
2003	817	4.073	<b>4.890</b>	62.577	189.249	<b>251.826</b>
2004	1.002	3.886	<b>4.888</b>	65.560	200.832	<b>266.392</b>

Fuente:

Año 1994: Ministerio de Asuntos Sociales. INSERSO (1995). Documentos Técnicos nº75. *Guía Directorio de Centros para Personas Mayores. Vol. I*

Años 1999-2003: Mº de Trabajo y Asuntos Sociales. Observatorio de Personas Mayores IMSERSO (2002). *Las Personas Mayores en España. Informe 2002. Vol. I*

Año 2004: Mº de Trabajo y Asuntos Sociales. Observatorio de Personas Mayores IMSERSO (2004). *Servicios Sociales Para personas Mayores en España. Enero 2004*

## Rate of Ownership/ Rate of Renters for Seniors before going to a Residence or Home, 2004

	Rent	Ownership	Usufructuar y	N.A	N
<b>Both Gender</b>					
<b>Total</b>	<b>22.2</b>	<b>74.1</b>	<b>2.7</b>	<b>1.0</b>	<b>583</b>
Under 85 years old	22.2	75.6	2.1	0.0	300
85 Years and over	21.7	73.0	3.3	2.0	278
<b>Men</b>					
Total	19.4	79.1	1.6	0.0	174
Under 85 years old	23.2	74.4	2.4	0.0	115
85 years and over	13.0	87.0	0.0	0.0	58
<b>Women</b>					
Total	23.2	72.3	3.1	1.4	409
Under 85 years old	21.7	76.3	2.0	0.0	185
85 years and over	23.7	69.7	4.0	2.5	220

Source: Observatorio de Mayores-IMSERSO, *Encuesta sobre Condiciones de Vida de los Mayores en Residencias*, Septiembre-Octubre 2004.

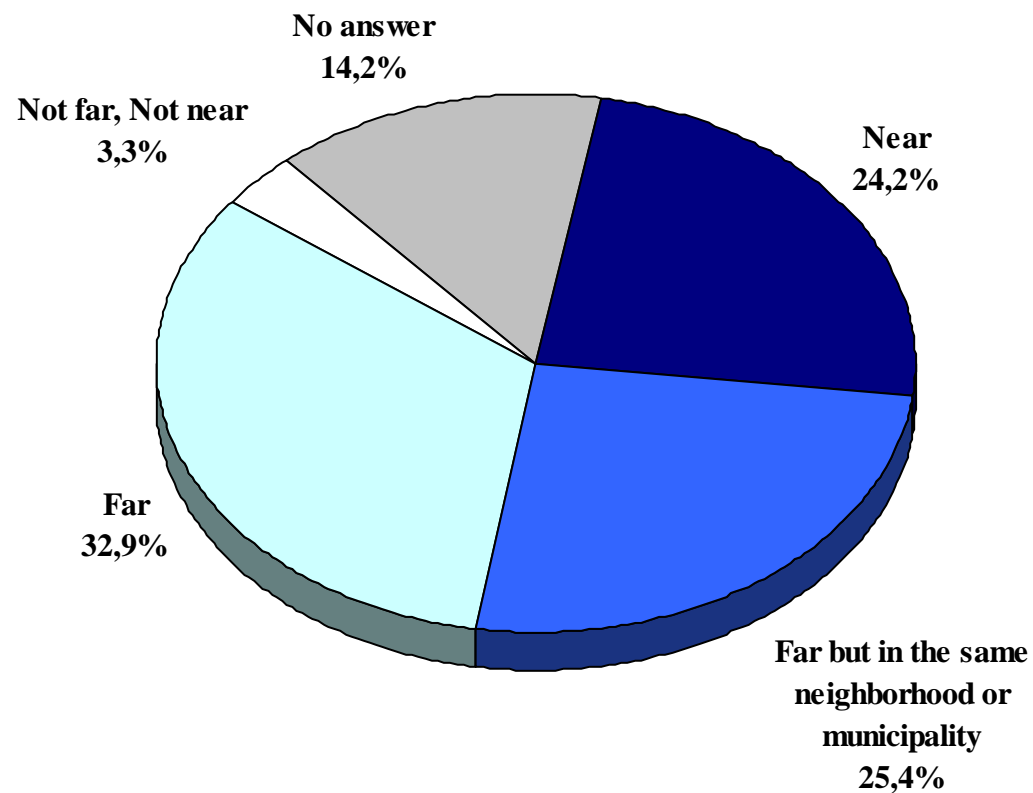


# Some Ideas about Residences or Homes for the Elderly..

- **CONNECTED TO THE SOCIAL SERVICES SYSTEM**
- **THE LAST OPTION ?**
- **A DINAMIC CONCEPT : NEW TRENDS**



## DISTANCE BETWEEN THE RESIDENCE AND THE PREVIOUS HOUSING



Source: Seniors Observatorio de Mayores-IMERSO, *Encuesta sobre Condiciones de Vida de los Mayores en Residencias*, Septiembre-Octubre 2004.



# AGING IN PLACE

- - PREFERENCES OF SENIORS: TO AGE IN PLACE
  
- THE COSTS OF AGING IN PLACE:
  - DEPENDENCY AND ABSENCE OF ELDER CARE
  - THE EXPENSES OF CARE-GIVERS.
  - SPANISH CASES OF “HOUSING MOBING” OR TO ENFORCE ILLEGAL EVICTION FOR SPECULATIVE REASONS
  - THE EXISTENCE OF ARCHITECTURAL BARRIERS




# IN-HOME CARE SERVICE

- “An individualized program to prevent and to rehabilitate, in which you can get a range of services and professional and technical intervention consisting of personal in-home care of psychosocial, family, and environmental support, provided in the house of the elderly person who is dependent to a certain degree”



# According to the Spanish Census...

- According to the 2001 Census, one fifth of seniors live in a building built before 1961. (11.8% of population).
- According to the 2004 Spanish Seniors Report, 83.6% of seniors who live alone are the owners of their homes.
- 89.0% of those who live with their spouse/partner are owners of their homes (where at least one of them is 65 or over).



# According to US. Seniors profile 2005

- Of the 21.6 million households headed by older persons in 2003, 80% were owners and 20% were renters
- For homes occupied by older householders in 2003, the median year of construction was 1965 (it was 1971 for all householders) and 5.2% had physical problems.
- About 72% of older homeowners in 2003 owned their homes free and clear

# HOMEOWNERSHIP RATES BY AGE IN THE UNITED STATES

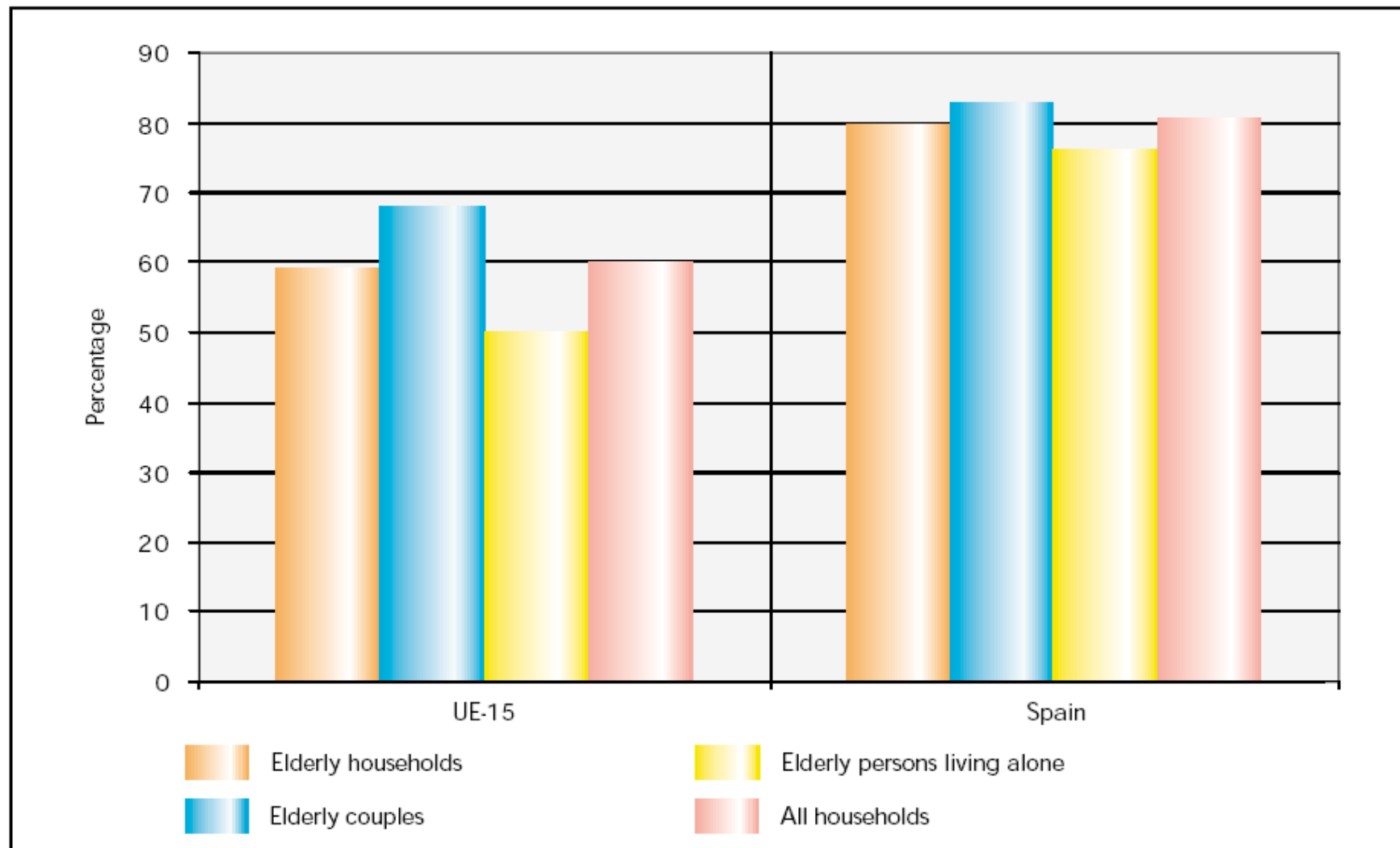
**Table A-5** Homeownership Rates by Age, Race/Ethnicity and Region: 1995–2006

	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
<b>All Households</b>	64.7	65.4	65.7	66.3	66.8	67.4	67.8	67.9	68.3	69.0	68.9	68.8
<b>Age</b>												
Under 35	38.6	39.1	38.7	39.3	39.7	40.8	41.2	41.3	42.2	43.1	43.0	42.6
35-44	65.2	65.5	66.1	66.9	67.2	67.9	68.2	68.6	68.3	69.2	69.3	68.9
45-54	75.2	75.6	75.8	75.7	76.0	76.5	76.7	76.3	76.6	77.2	76.6	76.2
55-64	79.5	80.0	80.1	80.9	81.0	80.3	81.3	81.1	81.4	81.7	81.2	80.9
65-74	80.9	81.9	82.0	82.1	82.9	82.8	82.5	82.7	82.3	83.3	82.8	82.7
75 and Over	74.6	75.3	75.8	76.2	77.1	77.7	78.1	78.4	78.7	78.8	78.4	79.1
<b>Race/Ethnicity</b>												
White	70.9	71.7	72.0	72.6	73.2	73.8	74.3	74.7	75.4	76.0	75.8	75.8
Hispanic	42.0	42.8	43.3	44.7	45.5	46.3	47.3	47.0	46.7	48.1	49.5	49.7
Black	42.9	44.5	45.4	46.1	46.7	47.6	48.4	48.2	48.8	49.7	48.8	48.4
Asian/Other	51.5	51.5	53.3	53.7	54.1	53.9	54.7	55.0	56.9	59.7	60.3	60.8
All Minority	43.7	44.9	45.8	46.8	47.4	48.1	49.0	48.9	49.5	51.0	51.3	51.3
<b>Region</b>												
Northeast	62.0	62.2	62.4	62.6	63.1	63.4	63.7	64.3	64.4	65.0	65.2	65.2
Midwest	69.2	70.6	70.5	71.1	71.7	72.6	73.1	73.1	73.2	73.8	73.1	72.7
South	66.7	67.5	68.0	68.6	69.1	69.6	69.8	69.7	70.1	70.9	70.8	70.5
West	59.2	59.2	59.6	60.5	60.9	61.7	62.6	62.5	63.4	64.2	64.4	64.7

Notes: White, black and Asian/other are non-Hispanic. Hispanics may be of any race. Asian/other includes Pacific Islanders, Aleuts, Native Americans, and persons of more than one race. Caution should be used in interpreting changes before and after 2002 because of rebenchmarking.  
Source: US Census Bureau, Housing Vacancy Survey.

**Figure 4.2**

**Percentage of households owning their accommodation in Spain and in the European Union, according to type of home, 1997**



Note: Elderly households: Elderly couples and elderly people living alone.

Elderly couples: Households composed of two adults at least one whom is aged 65 years or more.

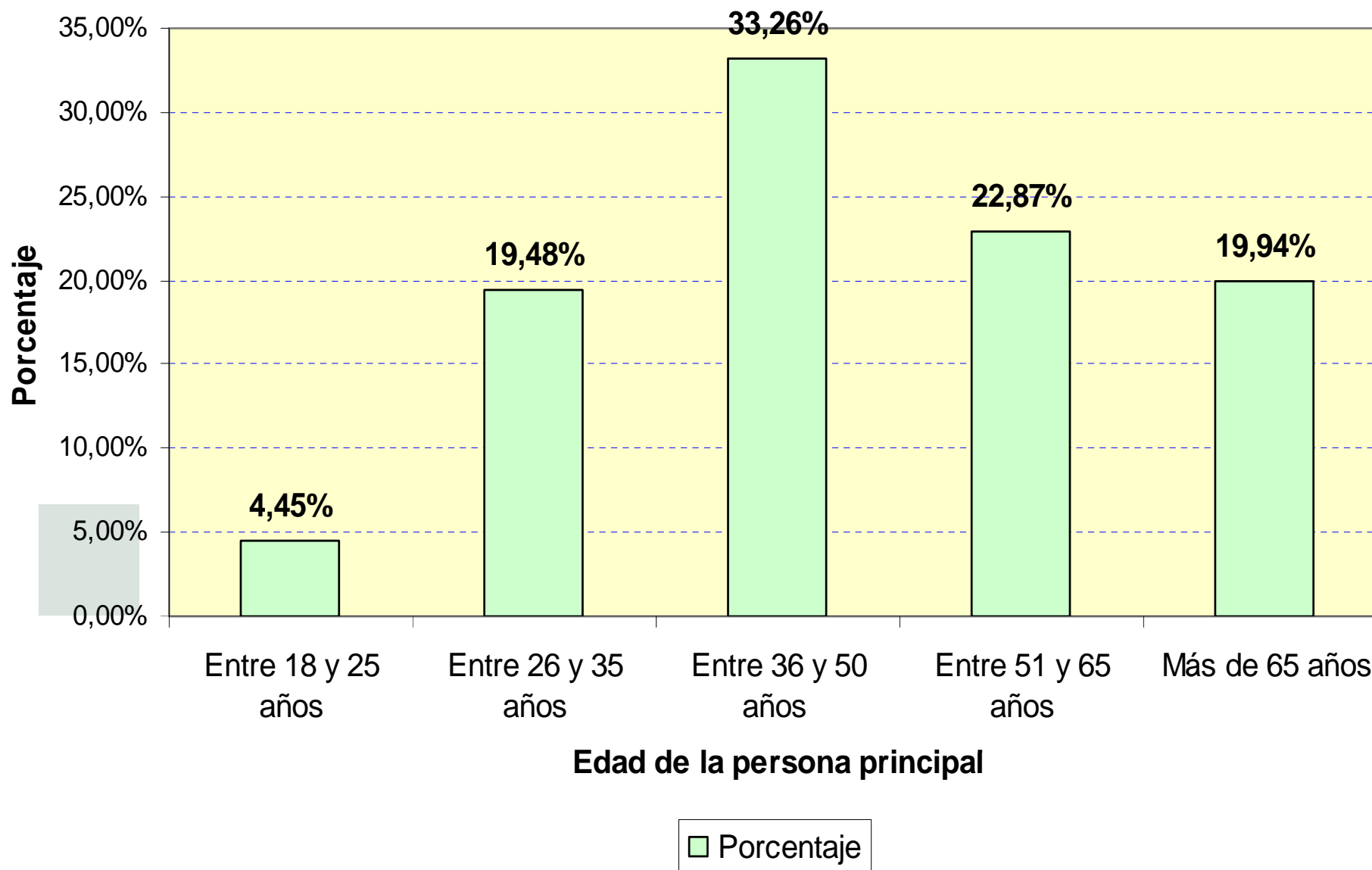
Source: EUROSTAT, European Community Household Panel.



GOBIERNO  
DE ESPAÑA

MINISTERIO  
DE VIVIENDA

# Rental Housing according to age





# THE IMPORTANCE OF LOCATION

- SEGREGATION IN HOUSING FOR THE ELDERLY /FAIR HOUSING ACT
- DETECTING THE GAP
- NIMBY PROBLEM





# LESSONS TO LEARN FROM THE PUBLIC INTERVENTION IN HOUSING POLICY

- THE INVESTMENT NEEDED ARE VERY HIGH AND IMPLIES NOT ONLY THE CREATION OF A PROPER STOCK OF HOUSING BUT THE MAINTENANCE OF THIS STOCK
- THE LOCATION OF PUBLIC HOUSING CAN CREATE GHETTOS IF THERE IS NO ENOUGH COORDINATION WITH THE URBAN POLICY DEVELOPMENT
- TO ENFORCE THE PUBLIC HOUSING SECTOR IS NEEDED TO ATTEND THE NEW CHALLENGE THAT THE FRAIL ELDERLY ARE REQUIRING
- THE PUBLIC SECTOR NEED A PARTNERSHIP WITH THE PRIVATE ONE TO DEVELOP CONVERSION FROM PUBLIC HOUSING TO PUBLIC ASSISTED LIVING HOUSING IN SPAIN OF SUITABLE SENIORS HOUSING IN THE US NEVER IS ENOUGH...



# THE PASSING OF THE SPANISH DEPENDENCY ACT AND ITS EFFECTS



# Defining Dependency:

Dependent(dependant):

“one not able to exist or sustain oneself without the power or aid of someone else”

“One who needs help with the activities of daily living (ADLs)”

© María Luisa Gómez Jiménez, Phd



# ACT 39/2006, of 14th December, on the Promotion of Personal Autonomy and Care for Dependent Persons

**PROJECTION OF THE NUMBER OF PERSONS WHO NEED HELP WITH THE ACTIVITIES OF DAILY LIVING ACCORDING TO THE DIFFERENT LEVELS OF NEED (SPAIN, 2005-2020)**

<b>Years</b>	<b>2005</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>
<b>Person who need some help with the activities of daily living</b>				
<b>Level 3 (High Dependency)</b>	194.508	223.457	252.345	277.884
<b>Level 2 (Serious Dependency)</b>	370.603	420.956	472.461	521.065
<b>Level 1 (Low dependency)</b>	560.080	602.635	648.442	697.277
<b>Total</b>	1.125.190	1.246.429	1.373.248	1.496.226

*Source: White Paper on Dependency. Projections of population from the INE*



# Defining dependency in the Spanish Act:

Dependency:

The permanent state in which persons that for reasons derived from age, illness or disability and linked to the lack or loss of physical, mental, intellectual or sensorial autonomy **require the care of another person/other people or significant help** in order to perform basic **activities of daily living** or, in the case of people with mental disabilities or illness, other support for personal autonomy.

© María Luisa Gómez Jiménez, Phd



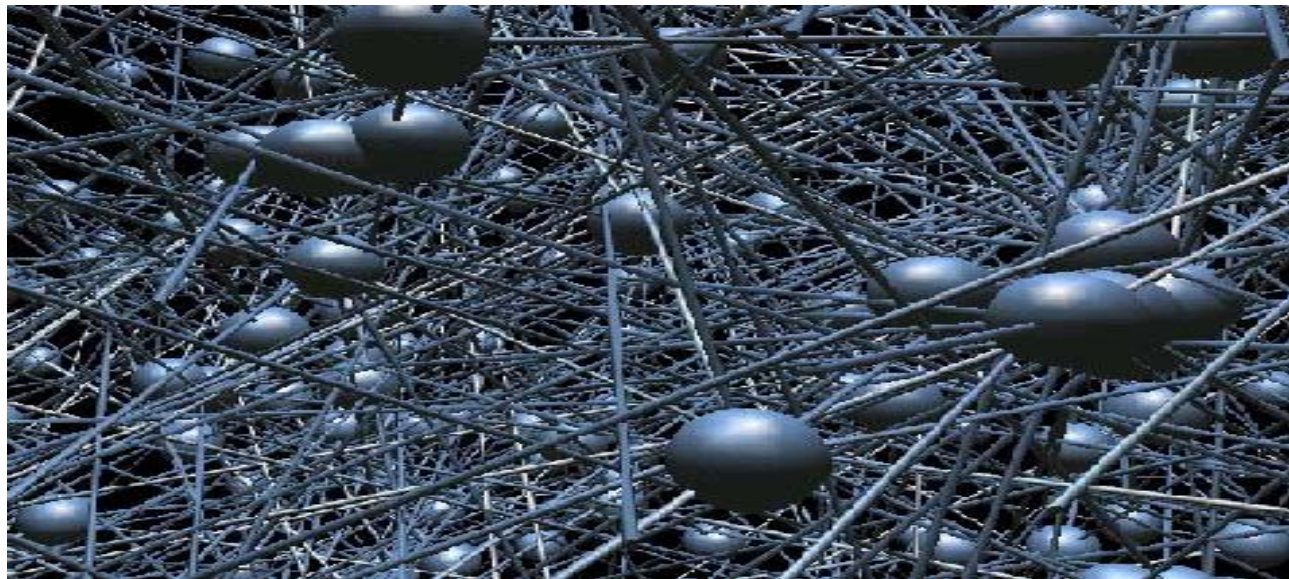
# MAIN GOAL OF THE ACT:

The System for Autonomy and Care for Dependency guarantees the basic conditions and common content to which this Act refers; serves as a common ground for the collaboration and participation of the Public Administrations, in the exercise of their respective competences, on the subject of the promotion of personal autonomy and protection for dependent persons; optimises the public and private resources available and contributes to improving the living conditions of citizens.



## THE CREATION OF THE NATIONAL DEPENDENCY SYSTEM

- The System is configured as a network for public use that integrates on a coordinated basis, both public and private centres and services





## Levels of protection in the System.

- The minimum level of protection established by the General State Administration,
- The level of protection that is agreed upon between the General State Administration and the Administration of each of the Autonomous Communities via Conventions
- Any additional level of protection that may be established by each Autonomous Community.



Dependency care benefits may be either

- Services

or

- Financial Benefits



# SERVICES

- (a) Services for the prevention of situations of dependency and for the promotion of personal autonomy.
- (b) Personal Alert System.
- (c) Home Help Service:
  - (I) Housekeeping tasks.
  - (II) Personal care.
- d) Day and Night Centre Service:
  - (I) Day Centre for older persons.
  - (II) Day Centre for persons under the age of 65 years.
  - (III) Day Centre with specialised care.
  - (IV) Night Centre.
- e) Residential Care Service:
  - (I) Residence for dependent older persons.
  - (II) Centre offering care for dependent persons, according to the various types of disability.

As for the Services...

Are regulated without detriment to the terms of article 14 of Act 16/2003, of 28th May, on the Cohesion and Quality of the National Healthcare System





## NON DELEGATION CLAUSE

- The services of assessment of the situation of dependency, the prescription of services and benefits and the management of the financial benefits foreseen in this Act shall be performed directly by the Public Administrations and may not be the object of delegation, hiring or subsidising private entities



## PART OF SOCIAL SERVICES NETWORK

.

- The benefits and services laid down in this Act are part of the Social Services Network of the respective Autonomous Communities in the scope of the competences that they have undertaken.

Nothing new under the sun...



## Financial benefit linked to service

This personal financial benefit shall in any case be linked to the acquisition of a service.

- This benefit shall only be granted when it is not possible to access a public or subsidised attention and care service, depending on the degree and level of dependency and on the beneficiary's economic status, in accordance with the terms of the convention held between the General State Administration and the Autonomous Community






## Dependency situations can be classified following according to three degrees (art.26):

Degree I: Moderate dependency: when the person needs help in order to perform various basic activities of daily living, at least once a day or when the person needs intermittent or limited support for his/her personal autonomy.

Degree II: Severe dependency: when the person needs help in order to perform various basic activities of daily living two or three times a day, but he/she does not want the permanent support of a carer or when he/she needs extensive support for his/her personal autonomy.

Degree III: Major dependency: when the person needs help in order to perform various basic activities of daily living several times a day or, due to his/her total loss of physical, mental, intellectual or sensorial autonomy, he/she needs the indispensable and continuous support of another person or when he/she needs generalized support for his/ her personal autonomy



**The effectiveness of the entitlement to the dependency benefits included in this Act shall be exercised on a progressive and gradual basis, in accordance with the following calendar, from 1st January 2007 onwards: (First Final Provision):**

- First year: for those that are assessed as Degree III of Major Dependency, levels 2 and 1
- Second and third years, for those that are assessed as Degree II of Severe Dependency, level 2
- Third and fourth years, for those that are assessed as Degree II of Severe Dependency, level 1
- Fifth and sixth years, for those that are assessed as Degree I of Moderate Dependency, level 2
- Seventh and eighth years, for those that are assessed as Degree I of Moderate Dependency, level 1.

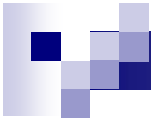


# Preliminary conclusions

- The role of an ageing society demands an outstanding response of public authorities to assure an adequate housing policy for seniors
  - A new tipological approach is needed
- The asset of aging in place determines a kind of responded connected to the role of a public social services policy to be developed

# Seeking alternatives





THANK S