



# AGEING WELL IN THREE CULTURALLY AND LINGUISTICALLY DIVERSE (CALD) COMMUNITIES

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**SUMMARY REPORT OCTOBER 2014**

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This is a summary of the full report *Ageing Well in Three Culturally and Linguistically Diverse (CALD) Communities* by Adjunct Professor Susan Feldman and Doctor Harriet Radermacher and commissioned by the Lord Mayor's Charitable Foundation.

## GLOSSARY

**AGWS:** Australian Greek Welfare Society

**CALD:** Culturally and Linguistically Diverse

**CO.AS.IT.:** Italian Australian Welfare Association

**CHFA:** Chinese Health Foundation Australia

**The Foundation:** Lord Mayor's Charitable Foundation

**Philanthropy:** Philanthropy is the voluntary act of giving for the public good, usually undertaken in a structured way through grant-making, complemented by research, influencing and bringing people together to share ideas and knowledge

**Project Worker:** Individual auspiced by AGWS, CO.AS.IT. and CHFA to conduct the research in the respective communities

**Research Consultants:** Individuals with research expertise employed by the Foundation to oversee project implementation, and the authors of this report

**Key informants:** Research interviewees who were from all levels of government, peak service and advocacy bodies (Stage 1 of research).

**Community representatives:** Interviewees who were key representatives from each community. Representing a wide range of organisations and had expertise across numerous areas known to be important for ageing well (Stage 2 of research).

## CHAPTER I

# INTRODUCTION

Ageing in a multicultural Australia has been identified by the Lord Mayor's Charitable Foundation (The Foundation) as a key priority area going forward. The *Ageing Well in Three Culturally and Linguistically Diverse (CALD) Communities* research project was an exploratory two-stage project which sought to discover how best to support ageing well in Chinese, Italian and Greek communities in Victoria. The exploratory research aimed to assist the Foundation in seeking direction on the role of philanthropy in supporting ageing well in each of the participating communities. The learnings from this research will enhance the prospects of ageing well in a culturally diverse Australia, and provide understanding on the role of philanthropy in making a positive contribution towards it.

## LORD MAYOR'S CHARITABLE FOUNDATION, PHILANTHROPY AND AGEING IN MULTICULTURAL AUSTRALIA

The Foundation has been supporting CALD communities for nearly half a century, commencing at the time of the influx of post-World War II migrants to Australia, when government and health services struggled to provide appropriate support. The work with immigrant communities was in full swing in 1971 with the support of the Australian Jewish Welfare and Relief Society.

The Foundation as a 'community' foundation has a distinct role that differs from private foundations or philanthropic trusts which are not constitutionally accountable to the public in the same way. Arising from and for the community, the Foundation takes on a role as initiator, responder and leader in the community. Furthermore, the work of the Foundation continues to evolve, reflecting the needs of the community and as such, it is becoming more aligned with the principles of social change philanthropy (*Lord Mayor's Charitable Foundation, 2012*).

[The Lord Mayor's Charitable Foundation not only has a history of working with the immigrant community, mainly the Italian, Greek and Chinese communities through its public appeals, but it has also assisted various organisations through the different waves of migration \(Lord Mayor's Charitable Foundation, 2012\).](#)

In 2009, the Foundation undertook a substantial review of ageing, incorporating the views of a wide range of experts (*Lord Mayor's Charitable Foundation, 2009*). The report identified that growing older was a complex process which demanded a broader understanding beyond the provision of institutionalised aged care (*Lord Mayor's Charitable Foundation, 2009*). It also highlighted the need to think about the diversity inherent within the ageing population of Victoria.

Building on this review, Ageing in a Multicultural Australia was identified by the Foundation as a key priority area (Impact Area) in 2013. This publication is a result of this strategic direction and is based on the recent research project *Ageing Well in Three Culturally and Linguistically Diverse (CALD) Communities*. The research and this publication demonstrate the Foundation's clear commitment to social change.

['...social change philanthropy focuses on the root causes of social, economic and environmental injustices; includes people impacted by injustices as decision-makers; and makes philanthropy more accessible and diverse.' \(Lord Mayor's Charitable Foundation, 2012\).](#)

## MULTICULTURAL AUSTRALIA AND VICTORIA

Australia is one of the most culturally diverse countries in the world. Australians speak almost 400 different languages at home, and report more than 250 different ancestries (Australian Bureau of Statistics, 2007). In 2012, 27 per cent (over 5 million) of Australia's population was born overseas, and a further 20 per cent had at least one parent born overseas (Australian Bureau of Statistics, 2012).

By using the 2011 census data for Victoria, we are able to identify the top countries of birth other than Australia. In identifying the three communities for the research project, in ranked order, we find China is placed 3rd (with 7% of the population born overseas), Italy is 5th (with 6% of the population) and Greece is 7th (with 4% of the population) (State Government of Victoria, 2013), (See Table 1). Similarly in the data, the top languages spoken, other than English, in Victoria were identified as Italian (1st; 10.1%), Greek (2nd; 9.5%), Mandarin (3rd; 8.4%), and Cantonese (5th; 5.9%) (See Table 2).

**Table 1. Top 10 Countries of Birth in Victoria in 2011 (State Govt of Vic, Population Diversity)**

Rank	Country of birth	Persons	As % Born Overseas
1	England	172,069	12.2
2	India	111,787	8.0
3	China (excludes SARs and Taiwan)	93,896	6.7
4	New Zealand	80,235	5.7
5	Italy	76,908	5.5
6	Vietnam	68,296	4.9
7	Greece	49,991	3.6
8	Sri Lanka	43,991	3.1
9	Malaysia	39,791	2.8
10	Philippines	38,002	2.7

**Table 2. Top 5 Languages spoken other than English in Victoria in 2011 (State Govt of Vic, Population Diversity)**

Rank	Language other than English	(LOTE) Persons	As % of LOTE Persons
1	Italian	124,856	10.1
2	Greek	116,802	9.5
3	Mandarin	103,742	8.4
4	Vietnamese	86,592	7.0
5	Cantonese	72,902	5.9

## AGEING IN CALD COMMUNITIES IN AUSTRALIA

### Ageing in multicultural Australia

Although the Australian population as a whole is ageing, the population of people from CALD backgrounds is ageing at a more rapid rate (Australian Bureau of Statistics, 2009; Gibson et al., 2001).

By 2026, one in every four people over the age of 80 is predicted to be from a CALD background (Gibson et al., 2001). This poses a significant challenge for the Australian Government in terms of addressing the diverse health needs of an ageing multicultural society (Karunaratna, Radermacher & Feldman, 2010).

*Integrating the concepts of ageing well into our thinking about growing old also has the potential to challenge the damaging stereotypes and ageist attitudes about older people being a homogenous group, attitudes which ignore the variation and differentiation between older people who are often portrayed as a burden on society (Angus & Reeve, 2006; Larkin, 2001).*

### Understanding ageing and ageing well

To counter the predominantly biomedical understanding of ageing in terms of illness and disease and to capture a more accurate picture of the ageing experience, several terms have been introduced in the literature (such as ageing well, healthy ageing, successful ageing, and active ageing). Based on a comprehensive review of the evidence, (Browning and Thomas, unpublished report, 2007) developed the following definition of healthy ageing:

*...a process whereby people can achieve or maintain the best possible state of physical, cognitive and mental health and wellbeing, meaningful and positive engagement with people, community and institutions, and a personal sense of security, choice and autonomy, with active adaptation to ageing processes from the individual, familial and societal perspectives (Browning and Thomas, 2007, p. 72).*

These developments in the conceptualisation of ageing, which encapsulate a more holistic understanding, better reflect the experiences of older people themselves, and the inevitable diversity that exists within a population. The more encompassing definition highlighted above also causes us to raise questions about the relationship between ageing well and factors such as gender, culture, ethnicity, the migration experience, and geographic location of residence (Feldman & Radermacher, 2014).

### Gendered perspective of ageing

Taking a gendered approach to exploring the life experiences of older women and men will necessarily provide a better understanding of growing older as a complex process which affects all human beings. In particular a gendered view highlights important life transitions and changes, as well as revealing inequalities that exist – in particular between people from CALD backgrounds (Feldman & Radermacher, 2014). For the purposes of this study, the term gender signifies culturally determined behavioural characteristics that are associated with, but not necessarily determined by, biological sex.

In the main, women's life experiences are different to those of men; and women's lives differ across the spectrum of the life-course in terms of child-bearing, midlife, menopause, widowhood and beyond (Feldman et al., 2002). To include women and men of different ethnic backgrounds in any analysis of ageing is not only a political act but good science because it is basic to understanding cultural values and constraints as well as 'social inequalities and work to change attitudes that construct older people's position in society through restrictive roles, beliefs and stereotypes' (Ray, 1996, p. 675). A gendered perspective ensures that what is gained is a multilayered understanding of diverse life courses between women and men of different ethnic backgrounds (Arber et al., 2003; Calasanti & Zajicek, 1993; Feldman & Radermacher, 2012).

## CHALLENGES FOR OLDER CALD AUSTRALIANS

People from CALD communities in Australia face a range of issues which have been well documented in the literature (Nimri; 2007; Orb, 2002; Radermacher, Feldman & Browning, 2009; Rao, Warburton & Bartlett, 2006). Concerns include physical health, mental and psychological wellbeing, socioeconomic welfare, social isolation, transport, and housing (Bartlett, Rao & Warburton, 2006; Orb, 2002). While these concerns are shared by older people from all backgrounds, there is strong evidence to suggest that they are exacerbated by cultural and language barriers as well as the experience of migration, gender and geographic location (Bartlett, Rao & Warburton, 2006). Indeed, the importance of maintaining cultural identity, values, practices and language has been found to be vital for people from CALD backgrounds as they age (Feldman et al., 2012).

Despite having additional needs, older people from CALD background are under represented in the use of services that are available (Department of Health and Ageing, 2009; Radermacher et al., 2008, 2009).

## AUSTRALIAN POLICY CONTEXT

Integral to healthy ageing within contemporary Australian life in general, and in CALD communities in particular, is the development of strong and relevant public policy. Over the past 40 years there have been significant policy developments at both federal and state levels which reflect the official place that multiculturalism has in Australia. These developments have been especially relevant in relation to improving the health and wellbeing of older people from multicultural backgrounds through the funding of relevant aged care and service delivery.

The research project described in this publication was informed by the following relevant Australian and Victorian Government policy initiatives:

- › Federal Government *Living Longer, Living Better 2012*
- › *National Ageing and Aged Care Strategy for People from Culturally and Linguistically Diverse (CALD) Backgrounds*, November 2012
- › Federally funded, state and local government delivered *Home and Community Care (HACC) Home Care Packages 1984*
- › *Victorian Government Health Priorities Framework 2012–2022*
- › Victorian Government *Improving Care for Older People: a policy for Health Services 2003*
- › Victorian Government *Diversity planning and practice in Home and Community Care Services in Victoria*
- › *Victoria's Advantage: Unity, Diversity, Opportunity 2014*
- › Municipal Association of Victoria (MAV) *Statement of Commitment to Cultural Diversity 2012*
- › Australian Aged Pension.

## CHAPTER 2

# THE RESEARCH PROJECT

The primary aim of the study was to investigate ageing well in three CALD communities – Chinese, Italian and Greek – from the perspective of both key informants and community representatives. A further aim of the study was to investigate the barriers and issues related to ageing well, and the capacity of the three communities to support older people in light of demographic and societal change.

Completed in two stages, findings from each stage of the research describe the key themes that emerged from interviews within the respective communities. The study brought together the perspectives of key informants and community representatives to create a more comprehensive understanding of ageing well as experienced by the participants in this study. In addition the findings will inform the Foundation on its possible role in supporting ageing well in CALD communities.

## PROJECT DESIGN

The initial stage of the project was a small qualitative study comprising semi-structured interviews with 17 key informants from all levels of government, as well as key informants from peak service and advocacy bodies. The participants were selected because of their particular expertise about ageing well. The first stage sought to explore the current capacity of the ethnic and ageing sectors to support people from CALD backgrounds living in Victoria to age well, and to identify the current and future role of philanthropy in supporting ageing well in multicultural Australia. The first stage of the project was completed by experienced research consultants.

The empirical data generated from Stage 1 informed and guided the second stage of the project, which explored the specific experiences and perspectives of the Chinese, Italian and Greek communities. Project workers from each community were employed to conduct three parallel, but linked, research projects in these three communities. Again, semi-structured interviews were conducted with key community representatives from each community.

The participants represented a wide range of organisations and had expertise across numerous areas known to be important for ageing well (e.g. services and support, health, academia, media, entertainment, recreation). The aim of Stage 2 was to explore the capacity of each respective community to support ageing well. At the conclusion of Stage 2, the research consultants drew together a list of recommendations based on the findings from both stages of the project, as well as the consultants' extensive expertise and knowledge in the field, to inform the ongoing work of the Foundation.

The recommendations relevant to the issues and challenges identified through the research have been included in this publication for the readers' interest.

## KEY FINDINGS FROM STAGE 1 AND STAGE 2

Research participants acknowledged that the current and future demographic and societal changes in Australia will have a profound impact on the quality of life and wellbeing of older CALD Australians.

Stage 2 of the research resulted in individual reports written by the project workers in the Chinese, Greek and Italian communities. These reports provided a detailed description of the findings from each community and a narrative of these findings are included in this publication.

Based on a synthesis of the findings from all three reports, the key themes that emerged from the community representative's data highlight the commitment and desire of the Chinese, Greek and Italian communities to support older people to age well. Interviews with community representatives, however, indicated that there were key differences between the three communities. These differences relate to each community's capacity for strategic planning, governance and experience with applying for funding from philanthropic organisations to support the service system related to ageing well within their community.

Surprisingly, there were clear distinctions between the Chinese community and the Italian and Greek communities, specifically in relation to their capacity to support ageing well within the community service sector.

In addition, the findings from Stage 2 community interviews indicated how currently, in all three communities, there is a perceived lack of formal communication or networking structures in place which facilitate relationships and partnerships with other relevant external service agencies; in what is often described as mainstream services. This lack of communication was also compounded by the limited knowledge about current models of best practice both within and external to their own communities in relation to ageing well.

### **SIMILARITIES AND DIFFERENCES BETWEEN KEY INFORMANTS (STAGE 1) AND CALD COMMUNITY REPRESENTATIVES (STAGE 2)**

Both the key informants and community representatives were able to provide interesting perspectives about the experiences of ageing well in the Chinese, Italian and Greek communities. The study looked at both the similarities and differences between the key informants and the community representatives; and together these two perspectives built a more comprehensive understanding. It is at the points of convergence or diversion that interesting insights were gained about ageing well in CALD communities.

The similarities and differences between the key informants and community representatives' insights reflect, to a certain extent, the range of contexts and discourses from which participants were speaking. For example, many of the key informants were selected to participate in the study because of their particular expertise about ageing well. Participants were from all levels of government in relation to policy making, funding or service delivery perspectives. In addition key informants from peak service and advocacy bodies were also interviewed.

These key informants, being very familiar with the policy and funding environment, tended to talk more about the changes and problems related to adequate resourcing of services and support for older CALD people continuing to live within their community.

Conversely, community representatives were likely to talk from their broader understanding of their community, based on years of experience of hearing and addressing issues within their community. Many community representatives, although more experienced with the positive support offered by agencies and services within their specific community, also identified key government policy and funding changes which have the potential to negatively impact on the quality and amount of support to older CALD people.

Key informants and community representative themes converged most strongly around the notion that culture is inextricably linked to beliefs and attitudes to ageing well, and in particular in relation to the role of generational changes in a community's capacity to support older people to age well.

### **CALD COMMUNITIES HAVE MANY STRENGTHS**

One of the key aims of the project was to identify the challenges and issues related to ageing well in CALD communities. In talking to participants, however, a number of strengths were highlighted which serve as a good context to present the overall findings.

Key strengths of the CALD communities identified by participants include:

- › Being well connected and in touch with their communities, which result in an intimate knowledge and understanding of their issues
- › Having a strong sense of family and belonging
- › Resilience and resourcefulness
- › A strong sense of responsibility to support their own (sense does not always translate into action)
- › A desire to give back to the community (also understood as volunteering capacity)
- › Being well organised and political, particularly amongst the older, more established groups, such as the Italian community.

The participants who talked about these strengths all had intimate knowledge and experience of working with CALD communities. However, this is not always the case. As indicated by several of the participants, there are many myths circulating about CALD communities. This highlights the need for vigilance and care in the interpretation of the data, as well as in planning for the future support needs of older citizens.

### **KEY CHALLENGES FOR AGEING WELL IN CULTURALLY DIVERSE COMMUNITIES**

Some of the key challenges identified in both stages of the study are well established and understood issues in both the literature and in terms of the experience of the CALD community. These contemporary challenges relate to intergenerational relationships; diversity; social isolation; communication and language; transport, mobility and geographic location; resistance against receiving residential aged care; and the desire to remain at home with familial support.

Together with the readily identifiable challenges noted above, there were other challenges identified by the participants in the project.

### **CHALLENGES**

- › Lack of awareness about the services and system and associated limited communication/engagement with communities
- › Development and delivery of services against background of policy change and funding cuts
- › Lack of cohesion amongst organisations within certain communities – possibly due to increased competition for reduced funds
- › Lack of understanding by community and services alike about the distinction between illness, dementia and dependence and what constitutes ageing well
- › An imperative for developing a vision about how to best meet the needs of the next generation of older people
- › Peak body and lead agency succession planning both in relation to assets (buildings) and human capital (volunteering and leadership skills)
- › Based on these results, researchers were able to aggregate and represent the responses in terms of community-specific challenges/issues and common general challenges/issues. In doing so it provides a clear overview of the challenges to ageing well in the communities explored. Further defining the challenges as either general, such as geographic isolation, or structural, such as retention of workforce, is also a useful exercise.

The table on page 8 identifies the challenges and issues using this framework and, importantly, provides recommendations to philanthropy as a response to the identified challenges.

### **DETAIL IN THE INTERVIEWEES ACCOUNT OF THE CHALLENGES AND GAPS IN SUPPORTING CALD COMMUNITIES TO AGE WELL**

The following section includes detail and quotes from the research. Quotes from the interviewees help put voice to the research. The challenges and issues identified in the table have been grouped under the following headings:

- › Demographics: the rapid increase in ageing populations
- › Navigating the service and support system (language and information)
- › Government funding and policy
- › Inclusive versus ethno-specific service models
- › Health, wellbeing and diversity
- › Engaging with older people
- › Organisational capacity
- › Workforce and training
- › Relationships and partnerships.



## CHALLENGES/ISSUES TO AGEING WELL IDENTIFIED IN THE RESEARCH

### Community-specific challenges/issues

Chinese	Greek	Italian
<ul style="list-style-type: none"> <li>• Poor engagement with government funding</li> <li>• Difficulty in navigating service system</li> <li>• Dependency on volunteer workforce</li> <li>• Lack of integrated coordination and collaboration within the Chinese community</li> </ul>	<ul style="list-style-type: none"> <li>• Rapid ageing rate for Greek community and changing needs</li> <li>• Inability of ageing individuals to communicate in English</li> <li>• Dependency on children</li> <li>• Inter-cultural marriage impacting on culturally specific family support</li> <li>• Poor health and mobility</li> </ul>	<ul style="list-style-type: none"> <li>• Social isolation</li> <li>• Lack of Italian specific services</li> <li>• Poor knowledge of health issues</li> <li>• Migration and regret in old age</li> <li>• Older Italian women particularly at risk of isolation</li> </ul>

### Common general issues

- Geographic isolation in smaller communities
- Language barriers at all levels including service navigation and service provision
- Reluctance to use residential care
- Cultural values impact on ageing experience (expectations and the Australian environment)
- Lack of capacity of families to support ageing family members
- Rapid increase in ageing populations

### Common structural issues

- Difficulties in forming partnerships
- Infrastructure needed for the changing demography
- Limited access to culturally-equipped, experienced workforce
- Retention of workforce
- Culturally and linguistically appropriate organisations' lack of capacity to provide appropriate services
- Challenge between ethno-specific vs mainstream service provision
- Limited engagement with philanthropic organisations

### Recommendations for philanthropic engagement

- Ensure that future philanthropic planning and funding within the ageing in multicultural Australia reflect the current political and sensitive debate.
- Provide resources for undertaking succession planning to promote the sustainability of established organisations to support ageing well in their respective CALD communities.
- Explore the potential for cross-sectoral engagement through collaborative networks within CALD communities in relation to ageing well.
- Consider implementing funding and application guidelines to support applications from smaller and less experienced CALD organisations.
- Provide resources to facilitate positive working partnerships within and between CALD communities and support ageing well initiatives.
- Provide resources to support CALD communities to undertake strategic planning and the development of evidence based services and programs to ensure greater alignment between need and service provision in specific communities.

## Demographics: the rapid increase in ageing populations

The dramatic and ongoing changes in demography in the CALD population were identified as a key challenge as well as a justification for future attention and resources. In particular:

- ▶ Increases in numbers of older CALD people will be associated with increasing demand for services
- ▶ The current service system needs to be proactive and responsive to increasing demand.

*'Ageing well is a top priority, of a community like the Greek community at the stage of settlement and integration that it is now.'* Service Provider

## Navigating the service and support system (language and information)

Navigating the complex service and support system was identified as a challenge for many people, but the challenges are compounded for people from CALD backgrounds. The key factors identified as hindering a better understanding and negotiation of the service system included:

- ▶ Community and residential care services are made further confusing due to the three tiers of government and associated funding and policy frameworks
- ▶ Sourcing bilingual workers to establish a multicultural workforce

*'Information advocacy. It's not just dumping information. It's actually saying, now in your circumstances, what's the information you need and how do we connect you.'* Peak Body

- ▶ There exists a lack of access to information and education about services in appropriate language in simplified forms via trusted bodies
- ▶ An increased amount of money, time and commitment are required by services to provide interpreters for clients.

## Government funding and policy

Issues related to all three levels of government and their associated funding and policy frameworks, for both ageing and CALD populations, were noted as posing challenges for promoting optimal health and wellbeing. These issues included:

- ▶ The uncertainty and lack of transparency around the aged care reform agenda in Australia, as well as increasing administrative requirements
- ▶ Insecure funding of ethno-specific and multicultural aged care services
- ▶ Limited capacity of government to fund research, community education, and respond to the changing community demographic
- ▶ Existing funding opportunities lack flexibility, do not promote sustainability and are rarely community driven
- ▶ Advocacy should not replace government failures
- ▶ Knowledge of CALD communities varies widely, particularly at the local government level, and is dependent on the demographic of the local community.

*'As systems fail you need more advocacy.'* Peak Body

### Inclusive versus ethno-specific service models

The future shape of service and funding models for people from CALD backgrounds was questioned by participants, particularly in relation to whether services should be provided and managed by ethno-specific, multicultural or mainstream service providers. While it was acknowledged that people from CALD backgrounds should have a range of options, which includes ethno-specific services, it is imperative that all organisations are inclusive and responsive to cultural diversity. The main issues included:

- ▶ Providing culturally responsive care is the responsibility of all mainstream services however it remains an ongoing challenge
- ▶ Mainstream services may be funded by government over ethno-specific services due to being cheaper, but this does not necessarily result in more effective services.

*'They're [mainstream services] getting better at it. But no, [inclusive practice is] not seen as part of the core. And that can be seen wherever you turn...CALD issues are not represented proportionate to the membership base.' Service Provider*

*'There's a big group out there of older people who are now retired, the ethnic baby boomers...they're an invisible group...they spent all their working lives working away, squirrelling away money...they have low levels of English... they've got nothing to do...their kids have moved out...they're interested in, just like everyone else, health and wellbeing...they won't go to local government stuff... not drawn to English speaking stuff...these people want meaningful activities.' Peak Body*

### Health, wellbeing and diversity

The wide range of conditions that coexist with the disadvantage experienced by many older CALD people, compared to their Australian-born counterparts, was identified as a key issue and provided clear justification for ongoing support and services. Several participants highlighted the diversity of beliefs and experience both within and across CALD communities and this has implications for future planning and support. The key issues raised included:

- ▶ Assuming that there are discrete cultural groups with a distinct profile can be problematic
- ▶ Optimal service delivery ultimately needs to be person-centred
- ▶ CALD older people still only seek help in a crisis, and don't always understand person-centred care and early intervention.

While there is some benefit in identifying the broader CALD community as a group in need, the immense diversity within and across the multitude of different CALD groups was acknowledged.

### Engaging with older people

Connectivity and active participation of older CALD people was noted to be of utmost importance, calling for more efforts to increase older people's engagement in community and civic life. The gaps identified included:

- ▶ Opportunities for engaging older CALD people in discourses about ageing well and associated service delivery
- ▶ Alternative, updated, senior social club models are required.

*'People from CALD backgrounds are not involved in the discourse of ageing or aged care.' Service Provider*

### Organisational capacity

Ethno-specific and multicultural organisations were noted to be currently overstretched, and often lacking in skills and resources to increase their effectiveness and promote their sustainability. This was particularly the case for smaller, less well established organisations. The key issues included:

- ▶ Limited knowledge about how and where to access alternative funding (e.g. via philanthropic organisations)
- ▶ Organisational capacity often resides in individual workers which is problematic when staff members leave
- ▶ The importance of organisations to be able to attract funds and resources (e.g. internal philanthropic funds and volunteers).

### Workforce and training

Workforce and training issues within service delivery organisations were highlighted as posing some challenges. In particular:

- ▶ Lack of skills and expertise amongst workers and organisations, including governance
- ▶ Time-poor staff which results in reduced access to quality training across the ageing sector
- ▶ The need for a bilingual and bicultural workforce
- ▶ Immigration policies hinder access to a pool of overseas skilled workers with required languages.

### Relationships and partnerships

It was generally agreed by participants that there was a lack of collaboration and sharing of resources across organisations. Participants speculated that this was due to:

- ▶ Lack of infrastructure and systems to support improved working partnerships
- ▶ Lack of understanding about the value of partnerships and how to make them work.

*'We need a new way of looking at the ethnic agencies to work with the greater system...we need to partner better, and have a recognition of their expertise.' Service Provider*

## Other issues

There were two other issues that were raised by the three communities in the research that need to be highlighted, which were **Family** and **Myths and stereotypes**:

*'Families are both a solution and a problem.'* *Peak Body*

*'Children and the grandchildren, most of whom will be responsible for decision of caring for their elderly...They are growing up here, with Australian values and Australian culture. Some of them will have been inculcated with the Greek traditions but the extent to which that happens is dependent on each family.'* *Service Provider*

*'Volunteering is a vexed issue...If [volunteering] is a substitute for adequate core funding, and also trying to push more responsibility back to families or volunteers...[Volunteering] should be the icing on the cake...I'm a great supporter of volunteering, and it's important but not if it is just policy to push the burden on that group.'* *Service Provider*

### Family

Family was discussed by a number of participants, both as a strength, and also at times as being problematic. Importantly, while family may play a key role in providing care, they need to be better supported in this role. The key issues raised included:

- ▶ Broader family perspectives can be at odds with an individual older person's view and opinions within the family network. This indicates that there is a need for sensitivity and awareness when identifying needs and solutions for and with an older person.
- ▶ Diverse intergenerational perspectives were identified as being potentially problematic, particularly when children of older people are born in Australia and grow up in different social and cultural environments.
- ▶ Changing values, beliefs and capacity about the role of the family to assist each other, and the associated and ongoing stigma about seeking external support and residential aged care, increase the burden and stress on families.
- ▶ The reliance on family to provide care and support is a concern and should not replace core funding.

*'In some instances, in some communities, they do some things well, however in the more broader community there would be this assumption that the Chinese know how to look after the Chinese community and they do it well...and if you say that they do it well then the answer is that they don't need additional support or capacity.'* *Philanthropy*

*'[Service providers] base their practice on myths, on assumptions.'* *Service Provider*

### Myths and stereotypes

Participants acknowledged the plethora of myths and stereotypes that abound in relation to CALD communities and the implications this has for subsequent access to funding and support. In particular:

- ▶ CALD communities are seen to be highly resilient with a great capacity to look after their own. However, if this is a stereotype then many people who are not as resilient with less access to resources may be missing out.
- ▶ There are expectations that ethno-specific organisations will do everything for free, which not only exploit the good will and resources of the community but also can serve to relieve mainstream service providers of their responsibilities.

*'I think it's a myth that CALD communities are more resilient or whatever than other [communities].'* *Service Provider*

## CHAPTER 3

# PHILANTHROPY AND AGEING

As exploring the role of philanthropy was a key aim of the research, it is reasonable that before considering the role of philanthropy in a multicultural Australia, we define what we mean by philanthropy. For this publication and the research that informed it, the Foundation used the following working definition:

*Philanthropy is the voluntary act of giving for the public good, usually undertaken in a structured way through grant-making, complemented by research, influencing and bringing people together to share ideas and knowledge.*

The working definition of philanthropy offers a position to view what is happening within society but also a position from which to respond. The response is important for all of philanthropy, because philanthropy requires action.

*[Philanthropy] has the capacity to transform our customary, relatively vague and loose vocabulary, conceptualization, and rhetoric throughout our philanthropic practice – from fundraising and recruitment of volunteers, to civil and liberal education, to inculcating values in our children and practicing them ourselves, to strategizing about the future of the sector and its values in the world (McCully, 2008, p. 41).*

This is a considerable challenge and philanthropy has not always been able to grasp it. There has been much research reviewing the role of philanthropy. In one of the biggest social movements in the 20th century; the civil rights movement in the US, it has been documented that the participation of philanthropy in that movement was reactive, and fairly slow in responding to the emerging social issues and in providing support (Jenkins & Eckert, 1986). Overall in recent times, there is an indication that philanthropy is moving from its historical response, to one of transformative social change. McCully asserts that the 20th Century saw a paradigm shift for philanthropy from activities that focused on general operating support grants and project grants, to innovation focused and capacity-building and grants designed with sustainability in mind (McCully, 2008). Much of the research and practice of progressive foundations in Australia, the UK and the US have embraced these developments.

The Lord Mayor's Charitable Foundation is a clear example of the transition within philanthropy identified above. From the redevelopment of the grants program through to the implementation of research projects such as this one, together with funding innovation in relevant impact areas, the Foundation along with other leading philanthropists and philanthropic foundations has the potential to support positive social change in Australia.

The research project described in this publication provides data, analysis and recommendation that can assist the decision making for philanthropy. The recommendations in the publication are directed squarely at philanthropy and should be reviewed and considered as part of Australian philanthropy's response to ageing in a multicultural Australia.



## THE ROLE OF PHILANTHROPY IN AGEING WELL IN CALD COMMUNITIES

Overall, key informants and community representatives alike expressed a lack of information and knowledge about what philanthropy currently is and does. The research project itself provided an avenue for education. With further explanation with the participants it was agreed that ensuring that older people in CALD communities age well requires the philanthropic and the broader sector to build stronger working relationships with each other. It was acknowledged that philanthropy has an important lead role to play in this regard.

Of those participants in both stages 1 or 2 who had direct experience of the philanthropic sector within their professional capacity, the following themes were evident:

- ▶ The general lack of understanding and experience of philanthropy on the part of both key informants and the community participants alike.
- ▶ Even when the work of the philanthropic sector was familiar, there was a lack of vision about the potential contribution of philanthropy to ageing well.
- ▶ An expressed need for more information to be available about the philanthropic sector.
- ▶ In addition philanthropy was perceived by key informants in particular, as having a vital role to play in filling the gaps left by government. On this point, the Foundation acknowledges there is a perception that this is a key role of philanthropy, but at the same time it is important to recognise that this is unachievable as philanthropy is not in the position to fill such large gaps.

## CURRENT AND FUTURE ROLE OF PHILANTHROPY

Despite varying degrees of professional experience of the philanthropic field, the majority of participants in this project offered insights and perspectives about the need for greater engagement and education.

Where philanthropy was acknowledged and understood, there was an overall positive view about the work of philanthropy, particularly in relation to the opportunity to play an influential role and provide leadership and financial support for innovative endeavours within the CALD ageing sector.

### Leadership

Most participants in the research had the view that, to some extent, the philanthropic sector is not currently taking a leadership role in relation to CALD communities and could do so through proactive, innovative and flexible approaches to funding. In addition, philanthropy was discussed in its future capacity to work strategically by identifying need and aligning grant making decisions on the evidence of need.

The philanthropic sector was seen by some participants as currently positioned to take risks that government and other funding bodies may not be willing or able to take. In addition, participants were also of the view that the philanthropic sector has the responsibility to take the lead and to be proactive in identifying where the greatest need exists. The sector also has a leadership role in ensuring that duplication related to funding and specific programs is avoided across the sector.

It was suggested by some that individual philanthropic organisations must lead by example and encourage others in the sector to undertake new and innovative work relevant to the ageing well of older CALD people specifically. In addition, philanthropy was described as positioned to take on a facilitator's role and encourage dialogue across a range of sectors with older people, government and non-government sectors.

Philanthropy was seen as well positioned to help drive the agenda within both government and non-government sectors based on demonstration projects that demonstrate how innovation might work to support ageing well in the CALD community.

## Philanthropic strategic development

The significance placed on strategic development within the philanthropic sector, particularly in relation to financial support for CALD communities, cannot be underestimated as an emergent theme in the study. Participants commented on the importance of thinking strategically about the political context in which they operate. Participants also reflected on the importance of thinking strategically about the diversity within and between population groups. A number of participants emphasised the importance of the philanthropic sector building on the learnings of government and considering the ideas of inclusiveness and diversity – outcomes for the individual rather than focusing on ethno-specific communities. Conversely, other participants argued that any strategic development must include specific CALD communities. While it was acknowledged by participants that advocacy is not the business of philanthropic organisations, suggestions were offered around taking a subtle role in advocating on behalf of CALD communities.

## Cross-sectoral partnerships

There was a general consensus amongst participants that in a dynamic political and funding context, organisations including those from the philanthropic sector need to work together in partnership to better address the needs of the aged CALD population in Victoria. The role and purpose however, of any partnership needs to be established and very clear to all agencies involved. It was suggested that there were many positive outcomes of partnerships between government, non-government and peak organisations. These included sharing of leadership skills across agencies at a CEO level, identification of CALD community needs, filling the gaps that government is unlikely to address, and being able to target and partner with CALD communities to learn what they currently do.

## Research

Finally, research was not seen as the key domain of philanthropic organisations. Philanthropy does, however, provide substantial financial support to individuals and organisations to undertake creative and innovative research studies that in turn provide an evidence base for decision-making and strategic direction in philanthropy. Providing funding for research which explores issues of community diversity, organisational capacity including leadership, partnerships and governance in relation to ageing well in the CALD sector was discussed by participants. It was acknowledged that the leadership in this particular research project shown by the Foundation was an example of how philanthropy can undertake research.

## CHAPTER 4

# WHAT IS THE SIGNIFICANCE OF THE PROJECT?

The Lord Mayor's Charitable Foundation hopes that this publication shines a light on the challenges that face our culturally diverse ageing community. The Foundation believes that this publication, and the research that informed it, are significant, and there are implications for future undertakings to enhance the experience of growing older and ageing well. The findings of the research project will assist the Foundation to plan, support and respond to the growing population of older people from culturally diverse backgrounds in the Melbourne metropolitan region and beyond. The Foundation commends this publication to the philanthropic sector and those working with CALD communities for the same purpose.

This project will also inform the Foundation's work in developing models for engaging with new and emerging communities and their older members in the future. In addition, this project served as a model of best practice on how philanthropy can work collaboratively with diverse communities. Finally, it was an empowering undertaking for the key agencies and individuals involved, building research skills and networks within and across communities as well as with the Foundation.

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**Lord Mayor's Charitable Foundation**

GPO Box 1851 Melbourne 3001

Phone:(03) 9633 0033

Fax: (03) 9650 9142

[info@lmcf.org.au](mailto:info@lmcf.org.au)

[www.lmcf.org.au](http://www.lmcf.org.au)

ABN: 63 635 798 473