Premier Consulting

Workforce Supply Analysis

Western Sydney, NSW

Lebanese Moslem Association

Contents

Executive Summary

Assignment Overview

The Lebanese Moslem Association ("LMA") has engaged Premier Consulting ("Premier") to assist in developing an Integrated Business / Capital Development Plan ("Integrated Business Plan") for a new culturally appropriate residential aged care facility ("RACF") located in Lakemba, New South Wales.

The purpose of this report is to provide a detailed understanding of the Aged Care Services "workforce supply" for a RACF in Western Sydney and to identify and inform LMA of the current and potential workforce issues within the aged care industry. Premier has undertaken a comprehensive study of workers in the Aged Care Residential Services industry within the identified catchment area for the newly proposed RACF, utilising the 2011 ABS Australian Census of Population and Housing.

The approach to the aged care workforce study was to first identify the relevant data set from the ABS Census to form the foundation of the research; this data set is the 'Workforce in the Aged Care Residential Services Industry'.

The catchment area was then defined based on the Department's Aged Care Planning Regions and the location of the RACF site in Lakemba, NSW. The proposed RACF is designed for Muslim communities in the broader Western Sydney area and as such, three (3) Aged Care Planning Regions, Inner West, South West Sydney and Western Sydney have been further identified and defined as the "Catchment Area".   Contained within the Catchment Area are thirty-two (32) SLAs as defined by the Department of Social Services ("DSS") and subsequently form the basis for aged care workforce study.

Based on the thirty-two (32) SLAs, the following factors were subsequently examined to provide an overall picture of the workforce supply within the Catchment Area:

- Total number of workers;
- Employment Labour status;
- Comparisons of the level of supply between the Catchment Area and NSW;
- Workforce analysis by age;
- Workforce analysis by gender;
- Number of Arabic speaking workers;
- Number of Direct Care workers.

Several leading aged care organisations were consulted in relation to the identification of current and potential workforce issues within the Aged Care Residential Services industry so as to formulate a comprehensive list of workforce issues and considerations when undertaking the construction of a new RACF.   In addition, Department of Social Services and ACSA publications / census survey results were reviewed to assist the findings.

Summary Result

Analysis of Existing Workforce Supply

Employment Labour Status / Total Workforce

The following tables outline the Employment Labour status of the Aged Care Residential Services industry workforce.

Workforce in the Aged Care Residential Services industry 2011 Census	Employed, worked full-time	Employed, worked part-time	Employed, away from work	Total Workforce	Population Aged 70+	Workers per 1,000 People Aged 70+
Catchment Area	6,861	6,929	863	14,653	164,849	89
NSW	22,959	28,521	3,482	54,962	713,855	77

Workforce in the Aged Care Residential Services industry 2011 Census	Employed, worked full-time	Employed, worked part-time	Employed, away from work
Catchment Area	46.8%	47.3%	5.9%
NSW	41.8%	51.9%	6.3%

Workforce in all industries 2011 Census	Employed, worked full-time	Employed, worked part-time	Employed, away from work
NSW	2,007,924	939,465	190,944
NSW %	64.0%	29.9%	6.1%

Within the Catchment Area, there are 14,653 people working in the Aged Care Residential Services industry and of that group, 46.8% are employed as full-time workers which is comparably higher than the NSW proportion of total workers (41.8%). That said, the proportion of full-time workers in the Aged Care Residential Services industry compared to the total of all other industries (64.0%) in NSW is significantly lower and is reflective of a number of factors:

-   The Aged Care Residential Services workforce is generally of an older age (refer to next section)
-   Aged Care workers demanding part-time work tends to be higher in the Aged Care industry compared to other industries
-   Aged Care is a challenging industry to be working in

Part-time workers in the Aged Care Residential Services industry for both the Catchment Area and NSW constituted 47.3% and 51.9% respectively of the entire workforce.

Additionally, when comparing the 70+ population and the total Aged Care Residential Services workforce, the Catchment Area represents a greater ratio of workers per 1,000 people aged 70+, as compared to NSW.

While there is a skew towards more part-time workers than full-time workers in NSW, the results within the Catchment Area highlights that there is generally a higher acceptance of working under either a full-time or part-time arrangements, thereby potentially providing more workforce flexibility for LMA.

Workforce Analysis by Age

The following table outlines the total Aged Care Residential Services workforce separated into four (4) age groups.

Workforce in the Aged Care Residential Services industry 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 +	Total Workforce
Catchment Area	5,189	3,697	3,973	1,794	14,653
NSW	16,522	14,076	17,111	7,253	54,962

Workforce in the Aged Care Residential Services industry 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 +	Total Workforce
Catchment Area	35.4%	25.2%	27.1%	12.2%	100.0%
NSW	30.1%	25.6%	31.1%	13.2%	100.0%

Workforce in all industries 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 +	Total Workforce
NSW	1,465,980	712,384	604,134	278,372	3,060,870
NSW %	47.9%	23.3%	19.7%	9.1%	100.0%

The proportion of workers aged 50 and over within both the Catchment Area and NSW constitutes 39.4% and 44.3% respectively of the total Aged Care Residential Services workforce. This compares to 28.8% for NSW as a whole across all industries.

The above trend highlights that there is a solid proportion of workers who will be reaching retirement age (65+) in the next 10 – 15 years with the major consequence of placing additional reliance on comparatively younger staff if the 65+ leave the workforce. The consequences of the 65+ leaving the workforce are numerous including:

- Skilled staff shortages;

- Additional stress on existing staff resulting in potentially higher staff turnover;

- Cost of employment;

- Lower number of experienced staff to 'mentor' and groom the next generation of aged care workers;

The aged care sector and its industry bodies are cognisant of the workforce issue and recognises that unless more workers are attracted to the aged care industry, there will be workforce supply and retention issues in the future. The sector is actively addressing its concerns around this issue and working to develop acceptable solutions.

Workforce Analysis by Gender

The following table outlines the Aged Care Residential Services industry workforce split by gender based on the ABS 2011 Census.

Workforce in the Aged Care Residential Services industry 2011 Census	Male Total Workforce	Female Total Workforce	Total Total Workforce
Total - Catchment Area	2,476	12,180	14,653
Total - NSW	8,455	46,507	54,962

Workforce in the Aged Care Residential Services industry 2011 Census	Male Total Workforce	Female Total Workforce	Total Total Workforce
Total - Catchment Area	16.9%	83.1%	100.0%
Total - NSW	15.4%	84.6%	100.0%

It is clear from the table above that the Aged Care Residential Services industry is significantly skewed towards female workers. In the Catchment Area, 83.1% of the aged care workforce are female and this compares to 84.6% of in NSW.

The female workforce skew is also reflected in the resident mix in a study published by the Australian Institute of Health and Welfare. According to their publication, *Residential Aged Care in Australia 2010 – 11: a Statistical Overview*, around 70% of permanent residents in aged care facilities were female as at 30th June 2011.

Considerate of the religious and cultural requirements to have workers of the same gender as the resident receiving care, the female / male workforce imbalance as evidenced above clearly highlights the potential difficulties in the recruitment of male Aged Care Residential Services workers. This position could be further compounded by the potential need for both a male aged care residential services worker combined with Arabic speaking skills.

Arabic Speaking Workforce

The following table outlines the total number of Aged Care Residential Services workers who can speak Arabic based on the ABS 2011 Census.

Workforce in Aged Care Residential Services industry 2011 Census	Arabic Speaking Workforce		
	Male	Female	Total
	#	#	#
Catchment Area	52	265	317
New South Wales	69	342	411

Similar to the overall gender skew for workers in the Aged Care Residential Services as a whole, female Arabic speaking Aged Care Residential Services workers in both the Catchment Area (83.6%) and NSW (83.2%) significantly outnumber Arabic speaking male workers.

That said, a significant proportion (77%) of all Arabic speaking Aged Care Residential Services workers in NSW are actually in the Catchment Area. This outcome suggests that in relation to sourcing an Arabic speaking worker regardless of gender, there is a higher probability of securing a person with the required language skills in the Catchment Area than it is for the rest of NSW.

Considerate of the religious requirements to have workers of the same gender as the resident receiving care, the female / male imbalance as evidenced above clearly highlights the potential difficulties in the recruitment of male Arabic speaking Aged Care Residential Service workers.

Workforce Analysis by Occupation

Direct care occupations within the Aged Care Residential Services Industry include Registered Nurses, Enrolled Nurses, Personal Care Attendants, Allied Health Professionals, Allied Health Assistants and Nurse Practitioners. Of these six (6) occupations, according to the DSS' Census of Residential Aged Care Facilities, Registered Nurses and Personal Care Attendants comprise the majority of direct care occupations as shown in the table below.

Proportion of total Direct Care Occupations			
Occupation	2003	2007	2012
Nurse Practitioner	n/a	n/a	0.2%
Registered Nurse	21.0%	16.8%	14.9%
Enrolled Nurse	13.1%	12.2%	11.5%

Personal Care Attendants	**58.5%**	**63.6%**	**68.2%**
Allied Health Professional	7.4%	7.4%	1.8%
Allied Health Assistant	Combined with Allied Health Professional	Combined with Allied Health Professional	3.4%

Personal care attendants not only comprise the greatest proportion of direct care occupations, but have also recorded the greatest growth over DSS' Census of Residential Aged Care Facilities periods.

Growth of total Direct Care Occupations		
Occupation	**2007**	**2012**
Nurse Practitioner	n/a	n/a
Registered Nurse	-6.7%	-2.2%
Enrolled Nurse	4.4%	3.8%
Personal Care Attendants	26.2%	18.4%
Allied Health Professional	11.0%	-22.5%
Allied Health Assistant	n/a	n/a

Personal Care Attendants comprises of the following occupations:

- Personal Carers and Assistants
- Aged and Disabled Carers
- Special Care Workers
- Nursing Support and Personal Care Workers
- Community and Personal Service Workers
- Carers and Aides

It is clear from the data, in structuring a Direct Care workforce, LMA must focus its efforts in recruiting the most suitably qualified personal care attendants and registered nurses, as these two combined constitute approximately 83% of the workforce from the DSS' Census of Residential Aged Care Facilities.

Extending the above analysis to focus only on the age distribution of registered nurses in the Catchment Area, the analysis suggests that a similar proportion of registered nurses are between 15 – 39 years old (36.2%) and aged 50 and over (37.9%), as shown in the table below. This compares to 28.6% and 46.5% in NSW for the same age groups respectively.

RNs in the Aged Care Residential Services industry 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 Years and over	Total RNs
Catchment Area	36.2%	25.9%	25.2%	12.7%	100.0%
NSW	28.6%	24.9%	31.6%	14.9%	100.0%

Workforce Analysis by Arabic speaking direct care occupations

As personal care attendants and registered nurses form the majority of direct care occupations in the Aged Care Residential Services industry, this section takes one step further and analyses Arabic speaking personal care attendants and registered nurses.

Workforce in the Aged Care Residential Services Industry 2011 Census	Personal Care Attendants			Arabic Speaking Personal Care Attendants		
	Male	Female	Total	Male	Female	Total
Catchment Area	807	5,260	6,067	15	115	130
NSW	2,722	20,499	23,221	20	125	145

Workforce in the Aged Care Residential Services Industry 2011 Census	Registered Nurses			Arabic Speaking Registered Nurses		
	Male	Female	Total	Male	Female	Total
Catchment Area	307	2,712	3,019	3	44	47
NSW	997	10,110	11,107	3	52	55

The tables above clearly demonstrate that not only is there a small number of Arabic speaking Personal Care Attendants and Registered Nurses in comparison to their totals, there is also a significant skew towards Arabic speaking females as well.

Combining the above information with the requirement for care to be delivered to a resident by the same gender workers highlights a significant potential for difficulties relating to the recruitment of Arabic speaking personal care attendants and registered nurses.

In order to address this potential direct care staff shortage, alternative care and staff training options may include:

- Use of translator services
- Regular and specific cultural and CALD training to be provided to all new and existing staff
- Use of picture cards
- Encourage family/friends/representatives/advocates to visit and interact residents on a more regular basis

Aged Care Workforce in Australia

Current Workforce

Based on *The Aged Care Workforce in Australia White Paper,* prepared by Aged & Community Services Australia ("ACSA") as at July 2014, "the workforce is stable, increasingly permanently employed, reasonably skilled, prepared to undertake further education and training and committed to the industry".

The main workforce characteristics in the Aged Care Residential Services industry were:

- The workforce is predominantly female, with very low proportion of males employed (13%);
- Very low proportion of full-time employees (40%);
- The workforce is generally older than national workforce and aging further;

- Higher proportion of the workforce were born in countries where English is not the main language (19%) compared with all industries (15%);

- Higher proportion of people providing unpaid assistance to a person with disability (17%);

- 58% of the workforce have worked in aged care for 10 years or more;

- Lower levels of educational attainment compared with all industries and significantly lower levels compared with the total Health Care and Social Assistance industry;

- Lower median weekly earnings in Aged Care Residential Services industry than the all-industry median; and

- Job satisfaction is high across all areas except for pay.

Future Issues

The following issues identified by ACSA (2014) have been identified as areas of potential focus in the future:

- Issue 1 - Recognise and support older workers;

- Issue 2 - Agree benchmarks on the measure of workforce shortages in aged care;

- Issue 3 - Aim for an overall workforce policy;

- Issue 4 - Need for detailed workforce planning;

- Issue 5 - How to secure additional staff to sustain industry growth;

- Issue 6 - Improve the quality of education and training and investigate opportunities for career pathway development;

- Issue 7 - Improve workforce culture and conditions;

- Issue 8 - Improve job satisfaction;

- Issue 9 - Improve management competencies in the aged care industry;

- Issue 10 - Improve information and community technology to enhance retention and productivity;

- Issue 11 - Improve mechanisms for developing changed models of care; and

- Issue 12 - Preparing for future recruitment.

Conclusion

The aged care workforce study and analysis of the workforce outcomes identify the following matters as most pertinent for LMA to consider in relation to operating its proposed new RACF:

1. The outcomes show that the Aged Care Residential Services industry consists of a high proportion of workers above 50 years of age

   o Outcome considerations:

     - An ageing workforce presents pressures in both recruitment and staffing.

     - Recruiting skilled and qualified workers within a 'timely' schedule is already an issue for the industry. An ageing workforce could exacerbate this as a result of a declining supply of suitably skilled and qualified workers.

     - As aged care workers approach retirement and the replacement of skilled staff is not commensurate with (or above) the rate of age care worker retirement, existing aged care workers will experience additional workloads resulting in potentially lower job satisfaction.

2. Female carers comprise the greatest proportion of the Aged Care Residential Services industry workforce, both on an overall basis as well as Arabic speaking individuals

- o Outcome considerations:
    - Cultural and religious preferences are for the provision of care be provided to a resident by a staff who is of the same gender as the resident.
    - The significant skew towards females currently working in the Aged Care Residential Services industry presents challenges in relation to recruiting and retaining male aged care residential services workers. The skew is also present for Arabic speaking persons, thereby further exacerbating this issue.

3. Out of all direct care occupations, personal care attendants form the highest proportion (68%) and have recorded the highest workforce growth (+26% in 2007, +18% in 2012) in DSS' last two Census of Residential Aged Care Facilities. Registered Nurses form the second highest proportion of direct care occupations (15%).

    - o Outcome considerations:
        - Personnel investment in these two occupations should be of the highest priority for LMA in the operations of their proposed RACF,
        - The recruitment and retention of these two occupations requires an important focus in the future operations of the proposed RACF.

4. Within the broader industry, females also comprise the greatest proportion of all registered nurses and personal care attendants, as well as for Arabic speaking registered nurses and personal care attendants.

    - o Outcome considerations:
        - Cultural and religious preferences are for the provision of care to a resident by a staff who is of the same gender as the resident.
        - Having a significant skew towards females currently working in the Aged Care Residential Services industry, particularly for the two key occupations presents challenges in relation to recruiting and retaining male personal care attendants and registered nurses.

Catchment Area Rationale

Defining the Catchment Area

The proposed RACF site location is within the suburb of Lakemba NSW and situated within the Canterbury SLA. In addition, as the RACF is designed specifically for Muslim communities in the broader Western Sydney area, the defined the Catchment Area also includes three (3) Aged Care Planning Regions: Inner West, South West Sydney and Western Sydney, representing thirty-two (32) SLAs. Accordingly, the thirty-two (32) SLAs, listed below, within the three Regions have been utilised as the source of the aged care workforce analysis.

Aged Care Planning Regions:	Inner West	South West Sydney	Western Sydney
SLAs	Ashfield (A)	Bankstown (C) - North-East	Auburn (C)
	Burwood (A)	Bankstown (C) - North-West	Blacktown (C) - North
	Canada Bay (A) - Concord	Bankstown (C) - South	Blacktown (C) - South-East
	Canada Bay (A) - Drummoyne	Camden (A)	Blacktown (C) - South-West
	Canterbury (C)	Campbelltown (C) - North	Holroyd (C)
	Leichhardt (A)	Campbelltown (C) - South	Parramatta (C) - Inner
	Marrickville (A)	Fairfield (C) - East	Parramatta (C) - North-East
	Strathfield (A)	Fairfield (C) - West	Parramatta (C) - North-West
		Liverpool (C) - East	Parramatta (C) - South
		Liverpool (C) - West	The Hills Shire (A) - Central
		Wingecarribee (A)	The Hills Shire (A) - North
		Wollondilly (A)	The Hills Shire (A) - South

Existing Workforce Analysis

Workforce Analysis by Employment Labor Status

The table below outlines the Employment Labour status of the Aged Care Residential Services industry workforce.

Workforce in the Aged Care Residential Services industry 2011 Census	Employed, worked full-time	Employed, worked part-time	Employed, away from work	Total Workforce
Ashfield (A)	198	234	21	453
Auburn (C)	212	289	23	524
Bankstown (C) - North-East	164	144	19	327
Bankstown (C) - North-West	166	142	28	336
Bankstown (C) - South	145	169	21	335
Blacktown (C) - North	387	337	42	766
Blacktown (C) - South-East	506	474	66	1,046
Blacktown (C) - South-West	444	421	75	940
Burwood (A)	125	162	16	303
Camden (A)	170	174	24	368
Campbelltown (C) - North	335	329	52	716
Campbelltown (C) - South	209	245	32	486
Canada Bay (A) - Concord	91	76	4	171
Canada Bay (A) - Drummoyne	59	66	7	132
Canterbury (C)	465	468	52	985
Fairfield (C) - East	294	283	46	623
Fairfield (C) - West	205	168	27	400
Holroyd (C)	343	348	44	735
Leichhardt (A)	97	59	10	166
Liverpool (C) - East	344	312	47	703
Liverpool (C) - West	237	225	20	482
Marrickville (A)	194	168	18	380
Parramatta (C) - Inner	193	203	19	415
Parramatta (C) - North-East	138	129	21	288
Parramatta (C) - North-West	129	114	13	256
Parramatta (C) - South	101	121	16	238
Strathfield (A)	94	142	12	248
The Hills Shire (A) - Central	241	228	24	493
The Hills Shire (A) - North	163	132	10	305
The Hills Shire (A) - South	108	140	6	254
Wingecarribee (A)	164	243	27	434
Wollondilly (A)	140	184	21	345
Catchment Area	6,861	6,929	863	14,653
NSW	22,959	28,521	3,482	54,962

Workforce in the Aged Care Residential Services industry 2011 Census	Employed, worked full-time	Employed, worked part-time	Employed, away from work
Canterbury SLA	47.2%	47.5%	5.3%
Catchment Area	46.8%	47.3%	5.9%
NSW	41.8%	51.9%	6.3%

Workforce in all industries 2011 Census	Employed, worked full-time	Employed, worked part-time	Employed, away from work
NSW	2,007,924	939,465	190,944
NSW %	64.0%	29.9%	6.1%

The table shows that:

- Within New South Wales there were 54,962 people working in the Aged Care Residential Services industry, of which 41.8% (22,959) were employed full-time compared with 64.0% for all industries;

- Within the Catchment Area, there were 14,653 people working in the Aged Care Residential Services industry, of which 6,861 (46.8%) were employed full-time;

- Within the Canterbury SLA, there were 985 people working in the Aged Care Residential Services industry, of which 465 (47.2%) were employed full-time.

Workforce Analysis by Supply Level Comparisons

The table below examines the number of workers in the Aged Care Residential Services industry per 1,000 people aged 70 years and over to provide a level comparison on workforce supply.

Workforce in the Aged Care Residential Services industry 2011 Census	Total Workforce	Population Aged 70+	Workers per 1,000 People Aged 70+
Ashfield (A)	453	4,633	98
Auburn (C)	524	4,405	119
Bankstown (C) - North-East	327	4,967	66
Bankstown (C) - North-West	336	6,916	49
Bankstown (C) - South	335	6,450	52
Blacktown (C) - North	766	4,717	162
Blacktown (C) - South-East	1,046	7,669	136
Blacktown (C) - South-West	940	5,220	180
Burwood (A)	303	3,572	85
Camden (A)	368	3,749	98
Campbelltown (C) - North	716	4,134	173
Campbelltown (C) - South	486	4,373	111
Canada Bay (A) - Concord	171	3,225	53
Canada Bay (A) - Drummoyne	132	4,342	30
Canterbury (C)	985	13,388	74
Fairfield (C) - East	623	11,005	57
Fairfield (C) - West	400	4,909	81
Holroyd (C)	735	8,412	87
Leichhardt (A)	166	3,490	48
Liverpool (C) - East	703	7,822	90
Liverpool (C) - West	482	3,151	153
Marrickville (A)	380	5,627	68
Parramatta (C) - Inner	415	2,780	149
Parramatta (C) - North-East	288	4,752	61
Parramatta (C) - North-West	256	4,088	63
Parramatta (C) - South	238	2,498	95
Strathfield (A)	248	3,064	81
The Hills Shire (A) - Central	493	5,362	92
The Hills Shire (A) - North	305	3,300	92
The Hills Shire (A) - South	254	3,311	77
Wingecarribee (A)	434	6,533	66
Wollondilly (A)	345	2,985	116
Catchment Area	14,653	164,849	89
NSW	54,962	713,855	77

The table shows that:

- Within New South Wales, there are 77 workers per 1,000 people aged 70 years and over, comprising of full-time workers, part-time workers and those who who were employed but away from work during census period;

- Within the Catchment Area, there are 89 workers per 1,000 people, which indicates a higher level of workforce supply than NSW;

- Within the Canterbury SLA, there are 74 workers per 1,000 people aged 70 years and over, which represents the lowest level of workforce supply in comparison to the Catchment Area and NSW.

Workforce Analysis by Age

This Workforce Analysis by Age section examines the age distribution of the workforce in the Aged Care Residential Services industry based on the ABS 2011 Census.

Workforce in the Aged Care Residential Services industry 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 +	Total Workforce
Ashfield (A)	239	65	99	48	451
Auburn (C)	282	95	104	43	524
Bankstown (C) - North-East	122	80	80	47	329
Bankstown (C) - North-West	80	98	104	52	334
Bankstown (C) - South	104	75	108	49	336
Blacktown (C) - North	244	205	238	77	764
Blacktown (C) - South-East	401	278	275	95	1,049
Blacktown (C) - South-West	317	285	263	72	937
Burwood (A)	164	42	61	36	303
Camden (A)	114	128	87	37	366
Campbelltown (C) - North	230	196	214	73	713
Campbelltown (C) - South	160	132	143	50	485
Canada Bay (A) - Concord	60	43	50	20	173
Canada Bay (A) - Drummoyne	38	33	32	30	133
Canterbury (C)	383	241	232	130	986
Fairfield (C) - East	189	172	168	95	624
Fairfield (C) - West	67	99	161	74	401
Holroyd (C)	290	195	162	88	735
Leichhardt (A)	53	30	40	41	164
Liverpool (C) - East	231	209	188	76	704
Liverpool (C) - West	139	135	156	53	483
Marrickville (A)	144	94	98	43	379
Parramatta (C) - Inner	240	73	67	37	417
Parramatta (C) - North-East	87	70	84	47	288
Parramatta (C) - North-West	78	65	77	36	256
Parramatta (C) - South	130	42	42	22	236
Strathfield (A)	126	51	44	27	248
The Hills Shire (A) - Central	141	101	154	95	491
The Hills Shire (A) - North	80	77	93	56	306
The Hills Shire (A) - South	62	62	86	46	256
Wingecarribee (A)	112	116	147	59	434
Wollondilly (A)	81	109	115	39	344
Catchment Area	5,188	3,696	3,972	1,793	14,649
NSW	16,522	14,076	17,111	7,253	54,962

Workforce in the Aged Care Residential Services industry 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 +	Total Workforce
Catchment Area	35.4%	25.2%	27.1%	12.2%	100.0%
NSW	30.1%	25.6%	31.1%	13.2%	100.0%

Workforce in all industries 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 +	Total Workforce
NSW	1,465,980	712,384	604,134	278,372	3,060,870
NSW %	47.9%	23.3%	19.7%	9.1%	100.0%

The table shows that:

- Within New South Wales, there are 24,364 workers aged 50 years and over in the Aged Care Residential Services industry, representing 44.3% of the total workforce compared with 28.8% for all industries aged over 50;
- Within the Catchment Area, 39.4% of the workforce is aged 50 years and over, which is significant higher than the percentage for all industries in NSW (28.8%);
- Within the Canterbury SLA, 36.7% of the Aged Care Residential Services workforce is aged 50 years and over, which is higher than NSW but lower than the overall Catchment Area.

Workforce Analysis by Gender

The following table outlines the Aged Care Residential Services industry workforce split by gender based on the ABS 2011 Census.

Workforce in the Aged Care Residential Services industry 2011 Census	Total Workforce		
	Male	Female	Total
Ashfield (A)	107	345	452
Auburn (C)	120	406	526
Bankstown (C) - North-East	49	277	326
Bankstown (C) - North-West	51	284	335
Bankstown (C) - South	57	277	334
Blacktown (C) - North	118	647	765
Blacktown (C) - South-East	183	863	1,046
Blacktown (C) - South-West	109	829	938
Burwood (A)	79	223	302
Camden (A)	35	334	369
Campbelltown (C) - North	81	636	717
Campbelltown (C) - South	52	433	485
Canada Bay (A) - Concord	41	133	174
Canada Bay (A) - Drummoyne	27	105	132
Canterbury (C)	188	798	986
Fairfield (C) - East	87	537	624
Fairfield (C) - West	47	352	399
Holroyd (C)	140	595	735
Leichhardt (A)	38	127	165
Liverpool (C) - East	95	608	703
Liverpool (C) - West	53	431	484
Marrickville (A)	105	276	381
Parramatta (C) - Inner	96	320	416
Parramatta (C) - North-East	48	243	291
Parramatta (C) - North-West	55	199	254
Parramatta (C) - South	45	191	236
Strathfield (A)	50	198	248
The Hills Shire (A) - Central	106	385	491
The Hills Shire (A) - North	70	237	307
The Hills Shire (A) - South	55	200	255
Wingecarribee (A)	60	374	434
Wollondilly (A)	29	317	346
Catchment Area	**2,476**	**12,180**	**14,656**
NSW	**8,455**	**46,507**	**54,962**

The table shows that:

- Within NSW, there were 46,507 female workers working in the Aged Care Residential Services industry, representing 84.6% of the total workforce compared with 46.8% for all industries;

- Within the Catchment Area, there were 12,180 female workers working in the Aged Care Residential Services industry, representing 83.1% of the total workforce;

- Within the Canterbury SLA, there were 986 people working in the Aged Care Residential Services industry, of which more than 80% were female workers (798).

Arabic Speaking Workforce

The following table outlines the total number of Aged Care Residential Services workers who can speak Arabic based on the ABS 2011 Census.

Workforce in the Aged Care Residential Services industry 2011 Census	Arabic Speaking Workforce		
	Male #	Female #	Total #
Ashfield (A)	-	3	3
Auburn (C)	5	7	12
Bankstown (C) - North-East	5	27	32
Bankstown (C) - North-West	4	18	22
Bankstown (C) - South	-	8	8
Blacktown (C) - North	-	12	12
Blacktown (C) - South-East	5	12	17
Blacktown (C) - South-West	-	11	11
Burwood (A)	-	3	3
Camden (A)	-	-	-
Campbelltown (C) - North	-	7	7
Campbelltown (C) - South	-	3	3
Canada Bay (A) - Concord	-	6	6
Canada Bay (A) - Drummoyne	-	-	-
Canterbury (C)	12	28	40
Fairfield (C) - East	6	12	18
Fairfield (C) - West	4	10	14
Holroyd (C)	6	29	35
Leichhardt (A)	-	-	-
Liverpool (C) - East	-	18	18
Liverpool (C) - West	5	6	11
Marrickville (A)	-	8	8
Parramatta (C) - Inner	-	4	4
Parramatta (C) - North-East	-	6	6
Parramatta (C) - North-West	-	4	4
Parramatta (C) - South	-	13	13
Strathfield (A)	-	-	-
The Hills Shire (A) - Central	-	5	5
The Hills Shire (A) - North	-	5	5
The Hills Shire (A) - South	-	-	-
Wingecarribee (A)	-	-	-
Wollondilly (A)	-	-	-
Catchment Area	52	265	317
NSW	69	342	411

The table shows that:

- Within NSW, there were 411 Arabic speaking workers in the Aged Care Residential Services industry;

- Within the Catchment Area, there were 317 Arabic speaking workers in the Aged Care Residential services industry, representing 77% of the total number in NSW;

- Within the Canterbury SLA, there were 40 Arabic speaking workers in the Aged Care Residential Services industry, of which 12 workers were male and 28 workers were female.

Workforce Analysis by Occupation

Direct care occupations within the Aged Care Residential Services Industry include Registered Nurses, Enrolled Nurses, Personal Care Attendants, Allied Health Professionals, Allied Health Assistants and Nurse Practitioners. Of these six (6) occupations, according to the DSS' Census of Residential Aged Care Facilities, Registered Nurses and Personal Care Attendants comprise the majority of direct care occupations as shown in the table below.

Proportion of total Direct Care Occupations			
Occupation	**2003**	**2007**	**2012**
Nurse Practitioner	n/a	n/a	0.2%
Registered Nurse	21.0%	16.8%	14.9%
Enrolled Nurse	13.1%	12.2%	11.5%
Personal Care Attendants	**58.5%**	**63.6%**	**68.2%**
Allied Health Professional	7.4%	7.4%	1.8%
Allied Health Assistant	Combined with Allied Health Professional	Combined with Allied Health Professional	3.4%

Registered Nurses and Personal Care Attendants together comprise approximately 83% of the direct care occupations in RACFs. Registered Nurses are a crucial component of the aged care workforce as they manage teams of care staff and provide specialist skills, including complex medication and care tasks. Personal Care Attendants comprise of the following job roles:

- Personal Carers and Assistants
- Aged and Disabled Carers
- Special Care Workers
- Nursing Support and Personal Care Workers
- Community and Personal Service Workers
- Carers and Aides

Growth of personal care attendants in the last two DSS Census of Residential Aged Care Facilities periods was the highest out of all categories.

Growth of total Direct Care Occupations		
Occupation	**2007**	**2012**
Nurse Practitioner	n/a	n/a
Registered Nurse	-6.7%	-2.2%
Enrolled Nurse	4.4%	3.8%
Personal Care Attendants	**26.2%**	**18.4%**
Allied Health Professional	11.0%	-22.5%
Allied Health Assistant	n/a	n/a

Age Distribution of Registered Nurses

This section examines the age distribution of Registered Nurses in the Aged Care Residential Services industry based on ABS 2011 Census.

RNs in the Aged Care Residential Services industry 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 Years and over	Total RNs
Catchment Area	36.2%	25.9%	25.2%	12.7%	100.0%
NSW	28.6%	24.9%	31.6%	14.9%	100.0%

Workforce in all industries 2011 Census	Aged 15 - 39 Years	Aged 40 - 49 Years	Aged 50 - 59 Years	Aged 60 +	Total Workforce
NSW	1,465,980	712,384	604,134	278,372	3,060,870
NSW %	47.9%	23.3%	19.7%	9.1%	100.0%

The table shows that in the Aged Care Residential Services industry:

- 46.5% of the Registered Nurses in Aged Care Residential Services industry were aged 50 years and over, compared with only 28.8% for all the industries in NSW of workers in all industries aged 50 and over;

- 37.9% of the Registered Nurses in Aged Care Residential Services industry were aged 50 years and over were in the Catchment Area, which is higher than the percentage for all the industries in NSW.

Workforce Analysis by Arabic speaking direct care occupations

As personal care attendants and registered nurses form the majority of direct care occupations in the Aged Care Residential Services industry, this section takes one step further and analyses Arabic speaking personal care attendants and registered nurses.

Workforce in the Aged Care Residential Services Industry 2011 Census	Personal Care Attendants			Arabic Speaking Personal Care Attendants		
	Male	Female	Total	Male	Female	Total
Catchment Area	807	5,260	6,067	15	115	130
NSW	2,722	20,499	23,221	20	125	145

Workforce in the Aged Care Residential Services Industry 2011 Census	Registered Nurses			Arabic Speaking Registered Nurses		
	Male	Female	Total	Male	Female	Total
Catchment Area	307	2,712	3,019	3	44	47
NSW	997	10,110	11,107	3	52	55

The tables above clearly demonstrate that not only is there a small number of Arabic speaking Personal Care Attendants and Registered Nurses in comparison to their totals, there is also a significant skew towards Arabic speaking females as well.

Combining the above information with the requirement for care to be delivered to a resident by the same gender workers highlights a significant potential for difficulties relating to the recruitment of Arabic speaking personal care attendants and registered nurses.

The Aged Care Workforce in Australia

Aged Care Workforce in Australia

This section assesses the profile of the aged care workforce in Australia through various published reports by leading aged care industry organisations.

General Characteristics

Based on *The Aged Care Workforce in Australia, White Paper,* prepared by Aged & Community Services Australia ("ACSA") as at July 2014, "the workforce is stable, increasingly permanently employed, reasonably skilled, prepared to undertake further education and training and committed to the industry".

The main workforce characteristics in the Aged Care Residential Services industry were:

- The workforce is predominantly female, with very low proportion of males employed (13%);

- Very low proportion of full-time employees (40%);

- The workforce is generally older than national workforce and aging further;

- Higher proportion of the workforce were born in countries where English is not the main language (19%) compared with all industries (15%);

- Higher proportion of people providing unpaid assistance to a person with disability (17%);

- 58% of the workforce have worked in aged care for 10 years or more;

- Lower levels of educational attainment compared with all industries and significantly lower levels compared with the total Health Care and Social Assistance industry;

- Lower median weekly earnings in Aged Care Residential Services industry than the all-industry median; and

- Job satisfaction is high across all areas except for pay.

Skill Shortages

The survey conducted in *The Aged Care Workforce, 2012 – Final Report*, released by the Department of Social Services ("DSS"), shows that three quarters of RACFs reported skill shortages in one or more occupations. Of the skill shortages, two-thirds reported Registered Nurse shortages.

There were three (3) main causes of skill shortages:

- Lack of staff with specialist knowledge;

- Geographical location of the facility; and

- The slowness of recruitment.

Recruitment Difficulty

Although the vacancies are now quicker to fill, the problem with filling RN vacancies is long-standing in the industry. According to ACSA (2014), RNs were the most difficult group to recruit with an average of seven (7) weeks to fill vacancies. This compares to the Department of Employment which regards six (6) weeks as a reasonable time to fill a vacancy for a professional position.

Based on the survey conducted in the *Profile of the Aged Care Workforce* prepared by the Department of Education, Employment and Workplace Relations ("DEEWR"), as at February 2012, the Aged Care Residential Services industry had low competition for RN vacancies with an average of 4.1 applicants per vacancy and only 1.8 suitable applicants per vacancy. The most common reasons for applicants to be unsuitable for RN positions in RACF positions were:

- Insufficient experience to perform job duties (55%);

- Insufficient qualifications or training to perform job duties (33%);

- Poor attitude or lacked basic work readiness skills (14%);

- Limited interest in the job (10%); and

- Inability to work independently (8%).

In response to vacancies, multiple actions used by facilities to find suitable staff as per ACSA (2014) were:

- Offer more hours to existing staff (64% of all facilities);

- Use agency staff (53% of all facilities);

- Provide 'on the job training' (43% of all facilities) and 'external training' (23% of all facilities) to increase the skills of existing staff and then fill skills shortages;

- Increase wages (15% of all facilities); and

- Use overseas recruitment as a response to staff shortages (only 2% of all facilities).

Retention

Turnover Rate

Prior to the GFC, in 2008, according to the ABS, 23.4% of all Australian women were in their current jobs for less than one year, which was similar to the figure quoted by the Productivity Commission for the aged care industry. Fast forward to 2012 and the proportion of all Australian women in their current jobs for less than one year declined to 18.9% and 15.8% for those in the aged care workforce, thereby implying that aged care workforce turnover is lower than all other industries.

ACSA (2014) showed that registered nurses possessed the highest staff turnover with approximately 20% of them being in their current role for less than one year. This compares to 37% of all enrolled nurses being in their current job for more than 10 years (lowest turnover of all residential aged care occupation groups)

The most significant reasons provided by facilities for vacancies as per ACSA (2014) were:

- Resignation;
- Retirement; and
- Creation of new positions.

The most significant reasons provided by employees for changing jobs as per ACSA (2014) were:

- To find more challenging work;
- To get the shifts or hours wanted;
- Difficulty with managers; and
- To get higher pay.

Intention to Leave

As per ACSA (2014), about 9% of all residential aged care employees were actively considering leaving their current employment. Nurses and allied health workers who had been in their current job for less than one year, had the highest proportion wanting to leave. However, over 80% of employees believed that they would be working with their current employer in a year and just over 5% indicated they intended to leave aged care industry. That demonstrates the workforce in residential aged care is relatively stable.

Job Satisfaction

ACSA (2014) concluded that job satisfaction is high in all areas including job security, the work, hours worked, opportunities, level of support, flexibility, match of work and qualifications, except for total pay which has been consistently one of the highest reasons for job dissatisfaction recorded on surveys in the past ten years.

Strategies

ACSA (2014) suggests that there appears to be three (3) broad strategic aims for addressing aged care workforce challenges:

- Enhancing recruitment;
- Increasing retention; and
- Improving quality and productivity.

A number of areas of strategic focus that could be developed to help achieve these aims have been identified. The Productivity Commission (2011) recommended that a comprehensive aged care workforce strategy needs to be independently developed to identify and address ongoing and future workforce issues and should include:

- Paying fair and competitive wages, and ensuring that increased payments to providers for higher wages actually is spent for this purpose;
- Ensuring that the pricing of services takes into account appropriate staffing levels, skills mix and remuneration arrangements;
- Improving access to education, training and professional development;
- Developing well-articulated career paths, better management and exploring innovations in governance;
- Extending scopes of practice;
- Reducing regulatory burdens; and
- Reducing the regulatory burdens and costs associated with employing aged care worker from overseas.

Most recently, the National Aged Care Alliance (2012) recommended the following strategic initiatives to address workforce issues:

- Pay fair and competitive wages;
- Better designed jobs so that part-time are more productive;
- Improve the coordination, targeting and quality of training; and
- Establish a ministerial taskforce to develop a comprehensive workforce strategy with a particular focus on the following areas:
    o Career pathways
    o The use of technology
    o Universal workforce policies
    o Entitlements portability
    o Promoting a learning culture
    o Quality management
    o Career pathways
    o Overseas recruitment.

Future Issues

The following issues have been identified in as areas of potential focus for the future and were posed as questions for discussion in ACSA (2014).

- **Issue 1 - Recognise and support older workers**: in recognition that aged care attracts and retains women aged over 45 years, it seems that the industry should recognise and celebrate this feature as a positive aspect of its workforce and not see it as a cause for concern. What support mechanisms and workforce features are needed to meet the needs and preferences of this age group so that the industry can continue to attract and retain this age group and achieve its future growth?

- **Issue 2 - Agree benchmarks on the measure of workforce shortages in aged care:** in recognition that over half of all vacancies were filled in less than three weeks. What should be the benchmark for the number of weeks, on average, to recruit staff to fill a vacancy before it signals a shortage of staff across the industry?

- **Issue 3 - Aim for an overall workforce policy:** are enhanced recruitment, increased retention and improved productivity the right overall aims?

- **Issue 4 - Need for detailed workforce planning:** how can the aged care industry, in association with government, best achieve detailed workforce planning to estimate the number of workers needed in the short to medium future to assist in developing recruitment strategies?

- **Issue 5 - How to secure additional staff to sustain industry growth:** what mechanisms will be necessary to ensure that the industry can sustain the predicted growth in workforce over the next decade? What strategies are needed to ensure that the residential aged care sector can employ more additional staff each year in the future? Is there a need to attract more migrant workers to supplement workforce shortages for specific locations?

- **Issue 6 - Improve the quality of education and training and investigate opportunities for career pathway development:** what is the best mechanism for increasing the quality of education and training programs for aged care workers?

- **Issue 7 - Improve workforce culture and conditions:** what industry wide mechanisms are available to improve remuneration and working conditions that will increase job satisfaction for aged care workers and improve retention?

- **Issue 8 - Improve job satisfaction:** how can we improve the understanding within the industry on the issue of job satisfaction and the factors that influence it in order to increase retention and productivity?

- **Issue 9 - Improve management competencies in the aged care industry:** what competencies should be targeted to improve those leadership and management practices that have an impact on recruitment and retention?

- **Issue 10 - Improve information and community technology to enhance retention and productivity:** what are the initiatives that are needed to improve the information and communication technology capacity of the aged care sector to have a bearing on staff satisfaction, productivity, efficiency and quality of care? How is knowledge about innovations in information technology disseminated across the aged care system to assist all providers to adopt best practice? Is there benefit in developing indicators of minimum standards in the adoption of best practice information and communication technology to guide providers towards workforce reform?

- **Issue 11 - Improve mechanisms for developing changed models of care:** what is the best mechanism to undertake large scale and more effective sector wide initiatives examining work roles, cultural changes, services redesign and quality improvement rather than the small scale localised projects of the recent past?

- **Issue 12 - Preparing for future recruitment:** if the skills required by the aged care industry in the future are different to those of the past what do we need to do to identify what these skills are, who should have them and what changes need to be made to recruitment strategies to prepare for the future?