Department of Social Services

Formative evaluation of the Home Care Packages Programme

Policy considerations paper

June 2015
Inherent Limitations

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No warranty of completeness, accuracy or reliability is given in relation to the statements and representations made by, and the information and documentation provided by stakeholders consulted as part of the process.

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The findings in this paper have been formed on the above basis.

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1 Introduction

In April 2015 KPMG completed the Formative evaluation of the Home Care Packages Programme and provided a Detailed findings report which was submitted to the Department of Social Services. A number of policy matters that influence the achievement of the government’s objectives for the home care system arose though the evaluation process that require consideration. The purpose of this paper is to highlight and explore these, providing a high level overview of the key policy issues and a preliminary view of the associated considerations for government. This paper does not provide detailed analysis or an action plan in response to these issues.

1.1 Context of aged care reform

Aged care reforms since the early 2000s have focussed on streamlining the system to reduce fragmentation and red tape, increasing options, improving funding sustainability, and increasing consumer choice and control in the context of growing demand for services and changing expectations of a rapidly ageing population. In recent years there has been a substantial reform agenda, starting with the residential aged care pricing review (the Hogan Review) and review of community care (The Way Forward), culminating with the Productivity Commissions’ Caring for Older Australians inquiry report in 2011. This resulted in the Living Longer, Living Better package in 2013. This package seeks to improve and strengthen the overall system in five key areas:

- Increasing consumer choice and control, including through Consumer Directed Care (CDC)
- Reorienting service delivery to consumer-direction, with a restorative (reablement/wellness) focus
- Streamlining access and transition processes (including the My Aged Care portal and gateway)
- Providing more options to support older people to continue living in their own home
- Making funding arrangements more sustainable, including basic fees for all consumers and additional income-tested capped fees for consumers with the means to contribute more to the cost of their care.

Underpinning this agenda is the objective of moving the aged care sector towards a consumer-led market.

1.2 Australian Government vision for home care

Increased capacity with enhanced consumer choice and control and a sustainable, fair funding framework are at the centre of the Australian Government’s articulated future directions for home care. The move to CDC service delivery models is a key mechanism for achieving this vision, although CDC is not in itself the only mechanism.

A major element of the wider aged care reform agenda is the significant expansion of home care packages, from the current 66,000 to 100,000 by 2017 and an additional 40,000 packages over the following five-year period to 2022. This expansion addresses the demand for home care services, however capacity alone will not address the changing expectations of consumers. Older Australians do not just want more options for home care,
they also want more choice (of services, of providers) and more control over their care.\(^1\)

The Australian Government envisions a transformative shift in home care service delivery and the home care industry to achieve enhanced consumer choice and control – away from a heavily prescribed, regulated industry where service providers control the use of government funds (and, effectively, the allocation of care and services), towards a consumer-led market of subsidised home care.

Under such an approach, consumers need open access to comparative information about services, pricing, and models of care to aid their decision making. This includes information about non-subsidised care and services, which some consumers may choose to supplement or substitute for subsidised services.

This overall vision sees the home care system transformed in line with broader shifts in approach to service delivery across the human services sector. The key drivers of this reorientation are to deliver better outcomes for consumers while also delivering on the dual objectives of effectiveness and sustainability.

Key to achieving this vision is the application of CDC to all home care packages from 1 July 2015, giving all home care consumers an individualised budget and control over their care plan.

- For consumers to be able to fully realise the potential benefits of CDC, they need access to information (and, in some cases, advice and guidance) to assist them to make informed choices.
- There are also a number of administrative and operational considerations, identified through the formative evaluation of the Home Care Packages Programme, which require resolution to enable effective transition to CDC.

The Government’s vision for home care involves developing the consumer-led market.

- This will require consideration of market and regulatory parameters, consumer empowerment and provider capacity.

Ensuring that subsidy funds follow the consumer through portability of packages requires a significant change to the current home care market. As providers will no longer be assured of holding a set number of packages allocated by the government, they will need to identify and articulate their competitive value proposition to consumers, with decision making shifting from the provider to the consumer, thus fundamentally changing the dynamics of the home care sector.

A key variable in translating this vision into reality is the capacity and readiness of providers to move toward the consumer-led market. Changes will be required to business and operating practices, service offerings, and workforce capabilities to ensure that there is a robust home care service industry. Some providers are well-advanced on this journey, most however are currently at various beginning stages.

A range of policy, regulatory, and operational considerations will need to be addressed concurrently to deliver on the objectives of the reform.

\(^1\) COTA Australia (2012) Summary report on the conversations on ageing, Canberra.
Department of Social Services
Formative evaluation of Home Care Packages
Policy considerations paper: June 2015

Figure 1: Overview of policy considerations

Home care vision

- Increased home care capacity with enhanced consumer choice and control, within a sustainable, fair funding framework

Key actions to achieve the vision

- CDC delivery model (July 2015)
- Consumer-led market
- Package portability (February 2017)

Policy considerations

- Consumer information and support
- Administrative and operational parameters
- Provider capacity and readiness
- Market and regulatory parameters
- Consumer empowerment

Establishing a strong industry and defining the role of government

Industry Context

- Shifts in service delivery across the human services for:
  - Better consumer outcomes;
  - Effectiveness;
  - Sustainability.

- Competition policy in human services

Source: KPMG
1.3 Summary findings from the formative evaluation

In April 2014, KPMG was engaged by the Department of Social Services (the Department) to conduct a formative evaluation of the implementation of the Home Care Packages Programme, including the transition to CDC. The evaluation considered the effectiveness of programme implementation; transition to a CDC model of delivery (focusing on provider readiness); and the operation of CDC in action. The findings highlight that transition to CDC is still in the early stages, with providers currently at differing levels of transition. The findings also identified a number of programme policy considerations necessary to support the transition to CDC and the development of a consumer-led market.

Table 1: Summary of key evaluation findings

<table>
<thead>
<tr>
<th>Programme implementation</th>
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<tbody>
<tr>
<td>• Overall, implementation of the Home Care Packages Programme has been effective.</td>
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<tr>
<td>• There is wide support for the new, simpler care level structure. Transition of existing consumers to new care levels has been relatively seamless.</td>
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<tr>
<td>• There is a lack of clarity regarding the interface between home care Level 1 and CHSP entry level services.</td>
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<td>• Systemic support for CDC could be strengthened by focussing on the CDC literacy and expertise of aged care auxiliary bodies (ACATs/ACASs, Aged Care Advocacy Providers, the Aged Care Complaints Scheme, and the Australian Aged Care Quality Agency).</td>
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<th>Transition to CDC</th>
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<tr>
<td>• Most providers are working towards full implementation of CDC by July 2015.</td>
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<tr>
<td>• There are a small number of providers who are ‘early adopters’ that have fully embraced CDC.</td>
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<tr>
<td>• There are also a small number who are somewhat resistant to CDC, and who have not made significant progress in implementing CDC arrangements.</td>
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<tr>
<td>• Most providers are placed somewhere between these two perspectives.</td>
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<tr>
<th>Operation of CDC in action</th>
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<tr>
<td>• The transition to CDC is still in its early stages and will take some time to be embedded in practice.</td>
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<tr>
<td>• Steps have been made towards increasing consumer choice and control, individualised care and support, and respectful partnerships – but this varies across providers.</td>
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<tr>
<td>• There has been limited focus on using CDC for restorative approaches.</td>
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<tr>
<td>• There could be better transparency of Home Care Package pricing to support consumer purchasing decisions.</td>
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Source: Formative evaluation of the Home Care Packages Programme – Detailed findings report (KPMG, 2015)
2 Policy considerations

There are a number of policy considerations that require resolution to enable the successful and sustained implementation of CDC, which will in turn provide the foundations for developing a consumer-led market and successful implementation of portable packages. These include addressing early operational parameters to prepare for funding portability. Of most importance will be the development of the home care market to support consumer direction. Key policy considerations include consumer empowerment and provider capacity and the role of government in market development and oversight in the context of the deregulation and competition policy agenda.

2.1 Operational policy

There are five key operational policy considerations that need to be addressed in the short term to maximise the success of CDC transition and ensure clarity of operating conditions for providers:

1) Clarifying the interface between home care packages and the Commonwealth Home Support Programme (CHSP) – articulating the intended differences between home care Level 1 and the community and home support sub-group of the CHSP, and monitoring the perceived financial disincentive for consumers to accept a package. The Government has announced its intention to amalgamate the CHSP and home care into a single programme in the future, which emphasises the importance of service type clarity.

2) Review of the assessment process – it is not clear at this point how eligibility assessment will occur when new packages are allocated through the aged care gateway (MyAgedCare) directly to consumers from February 2017. The formative evaluation identified a number of questions relating to assessment, including whether there is an ongoing need for a re-assessment for consumers to move from home care levels 1-2 to levels 3-4.

3) Boosting the wellness and restorative focus - the adoption of restorative (wellness/reablement) practice in home care could be fostered, potentially through the Good Practice Guide that has been co-designed with the sector to underpin the CHSP implementation and is also relevant to home care. This is an area that the sector is interested in and for which there is widespread support but for which there has been little substantive progress to date. There is an opportunity to harness enthusiasm, using a co-design approach, to influence the way providers and consumers utilise home care packages to positively impact on the health and wellbeing of care recipients by developing and promoting the evidence base.

4) With the Government’s announced intention to introduce portability of funding by allocating packages directly to consumers from February 2017, it will be necessary to consider the administrative parameters to give effect to this. Key policy considerations will likely include:

- Defining portability: who it applies to, which packages it applies to, whether it is retrospective, whether there needs to be transitional or grandfathering provisions
- Whether portability is national and allows purchase across planning regions and/or jurisdictions
- Protocols / rules to guide portability, in particular parameters around changing providers (timing, notifications, approvals processes) and
risk management mechanisms to ensure continuity of care for consumers in the event of a provider failure

- Whether additional measures are needed to support provider viability, given the changed operating conditions where providers will no longer hold an assured number of packages.

5) Ongoing communication will be key. As such it will be important to revise communication strategies with the sector to ensure clear and consistent messaging regarding the long term vision for the sector including the development of a consumer led market. This would include articulating the intended roles and responsibilities of the Aged Care Complaints Scheme, National Aged Care Advocacy Programme, and the Australian Aged Care Quality Agency in the service system in the context of this changed market environment.
3 Developing the home care market

Striving for a home care sector that is vibrant, diverse and responsive to the needs and expectations of consumers from different segments of the community is an ongoing goal. Achieving this goal will likely require a set of actions by government in the short term that are different to what government’s role will be in the sector in the longer term. There are transitional actions that government can take to support the longer-term goal of effective self-regulation and a consumer-led market. In order for government to achieve its long-term objectives for the home care sector it will need to consider the notion of ‘markets’ and what role it has in developing the home care market.

Market development considerations around human services reforms are complex – they need to be delivered by concurrently supporting the maturity of all participants in the market to achieve the objectives. The success of the home care reforms will be underpinned by:

- Understanding and clearly articulating the requirements and expectations of the market from the perspective of each of its participants – consumers, providers, industry and government
- The capacity to identify challenges and opportunities in the market to deliver on requirements and expectations of participants
- A suite of both regulatory and non-regulatory intervention levers, targeted to different participants in the market, to continually lift performance and remediate poor performance.

The development and evolution of markets occurs as a result of the behaviours and choices of consumers and providers over time which are in turn informed by information, influenced by incentives and guided or constrained by regulation. Understanding the requirement for any government intervention within the market (both regulatory and non-regulatory) is fundamental to the development of an effective market that enables the government’s objectives for the aged care system to be achieved.

Within this context there are a number of considerations with regard to market development. These include:

- Through the shared vision and objectives for the aged care system it is necessary to identify the vision, expectations and directions for the home care market – what does it look like and what does it need to deliver? Having an articulated vision for the market will support understanding by all participants and underpin how participants adapt and evolve their practices and behaviours over time. This includes cultural and behaviour change, business and operational practices and activities to support a diverse and sustainable home care sector. The vision and expectations for the home care market should be communicated to all participants.

- Understanding what the current market looks like and assessing current and future demand and supply requirements and the assessment of supply risks, for example by geography or service type. This enables the identification of market gaps or likely potential areas of market failure (for example, some rural and remote areas) and supports earlier identification and response strategies. Much of the information needed to inform this ongoing assessment is already available to the Department through existing data collections.
• Understanding how the home care market intersects with the broader aged care market and other sectors, in particular the disability and health sectors as well as the relationship of the home care sector to the broader mainstream system.

• The provision of information to consumers to support their understanding and decision making with regard to purchasing decisions. This includes information on providers, location of providers, price and any information to support an understanding of the quality and effectiveness of providers business and service models. Some of this information is already available through MyAgedCare (location of providers), and it is understood that options for including pricing and quality information are currently being explored by the Department. The provision of information to support providers' understanding of consumers' needs and preferences and their ability to respond. This includes new information on consumer purchasing patterns and behaviours which is not currently available, and would complement the regularly published information on types and distribution of packages, location of consumers.

• The identification of appropriate interventions or levers to respond to supply and demand requirements. Levers can support response to market gaps / potential market failure, but also can be utilised to strengthen and encourage market participation, support and reward performance, manage underperformance, provide incentives to respond to market demand and encourage innovation to ultimately drive a diverse and responsive home care sector.

Some practical ways to achieve this:

• Work with all market participants (e.g. providers and industry bodies) to develop a clearly articulated roadmap to document the vision and direction for the market and the expectations of what the market needs to deliver. The outputs of these activities need to be underscored by a process of co-design and collaboration.

• Prepare and enact a simple communication strategy to support the development and release of the market development framework.

• Utilise current departmental and publicly available information to analyse the market and form a view of the current market, in terms of, supply, demand, key intersections with the aged care market and other sectors and key market risks. The current work of the Department and the NDIA could be leveraged here.

• Utilise existing consumer groups and peak bodies to agree and develop appropriate information for consumers and / or refresh and build on existing consumer information mechanisms.

• Build on the existing MyAgedCare portal as the primary mechanism for information access and release.
3.1 Empowering consumers

The capacity of consumers to exercise choice and control within the sector is central to achieving the objectives of CDC. However there are often barriers to consumers having the necessary skills, knowledge and confidence to exercise choice and control without having additional information and support. There are information asymmetries within the market that mean consumers are not well informed as to the nature of services they receive and are not sufficiently informed to therefore judge the quality and effectiveness of services. In particular for some groups of consumers, for example those with dementia or memory deficits, this can reduce their natural capacity to receive and communicate information.

As a starting point it will be important to establish mechanisms for the ongoing provision of information to consumers. These are important levers in supporting consumer choice and control that ultimately inform the market and how it needs to respond. This could include information to inform consumers as to:

- The objectives of Home Care Packages and CDC
- The implications for consumers and their rights and role within the service system
- The range of information and services available within the market to facilitate greater choice and control, and how these can be accessed
- Enabling consumers to understand different options and CDC arrangements - information could be developed that demonstrates different experiences and outcomes from that experience.

The information that is currently available, primarily through MyAgedCare or COTA’s Home Care Today (or variants on those sources produced by providers) focuses primarily on explaining what CDC is at a very basic and broad level. Over time, the development of richer, evidence-based information sources to assist consumers and their advisors to better understand CDC and what they might look for in different providers is something that the sector could develop collectively.

Many consumers will require no additional support in their decision making. However there are likely to be consumers that would benefit from independent assistance to support and guide their decision making around provider and service selection. Consideration should be given to whether this support will be made available through existing funded advocacy services or through another mechanism – in either case, the capacity of the independent guide (including understanding of CDC) will need to be taken into account.

Some practical ways to achieve this:

- Develop a holistic approach to underpin these activities.
- Develop a consistent and accessible templates / formats for all information provided to the market.
- Use multiple dissemination channels tailored to specific consumer groups and market participants.
- Communication may be disseminated by leveraging the networks and knowledge of industry and peak bodies to aggregate and disseminate information.
- Utilise the MyAgedCare portal to establish an e-market platform to collect and rapidly disseminate participant stories, feedback and outcomes within the sector.
- Agree the minimum standard of information to be provided to participants prior to service purchase.
- Establish an e-forum for consumers to share information and stories.
Figure 2: A model of consumer empowerment underpinning CDC

3.2 Provider capacity

In order for CDC to be fully operational and for the home care market to develop in the manner required for portability to operate as intended, it will be important for there to be a diverse and sustainable home care provider market. This will require the current provider market to adapt and evolve over time. For providers this will require them to adapt service and business models and operational practices to better support choice and control, in particular how consumers utilise their package funds to make decisions on what services they want and from whom they will purchase those services. There are four specific areas where action could be taken to support a diverse and sustainable provider base:

- **Addressing provider readiness and capacity building** – supporting providers who have made insufficient substantive process transitioning to CDC, including smaller providers, those targeting special needs groups such as people from culturally and linguistically diverse backgrounds or Aboriginal and Torres Strait Islander backgrounds, and/or those in rural or remote locations. Support is likely to be required not only in developing a CDC model of service delivery and complying with minimum requirements, but also in the transformation of their business and financial models in readiness for the move to portability of packages and to remain viable in the new market arrangements. This support need not be specifically coordinated or delivered by the department—it may be industry led and could involve for example peer-based provider support networks.

- **Encouraging a diversity of providers** in the market – this may include monitoring areas of possible market failure (such as rural and remote areas, or services for some special needs groups) and exercising market levers to redress those failures, if necessary. It may also include encouraging the development and trialling of new CDC-based service models targeted to special needs groups who are under-represented in the home care packages population. Further, this may include reviewing market operating restrictions that artificially constrain provider growth by limiting the aged care planning regions in which an already approved home care provider can operate – this could form a component of the portability preparations.

- **It will be important for the Department to place information into the market** that assists providers to better understand the needs of consumers so that they can adjust their service and business models. This would include analysis of home care and CDC issues considered by the Aged Care Complaints Scheme and the aged care advocacy services, two potentially rich data sources that are, at present, relatively untapped. In addition, in the medium term and within the context of service quality and performance expectations, it will be important to establish and communicate a minimum standard of information to be provided to consumers prior to decision making and ultimately purchasing. This should then be communicated more broadly to providers within the market.

- **Providing incentives for good performance** – generally, provider performance management has tended to focus on addressing poor performance and supporting performance uplift. In looking to establish diverse and sustainable provider base it will be equally important to consider the capacity to reward and incentivise good performance which could form part of the regulatory frame underpinning consumer direction. Considerations could include for example:
  - how good performance is recognised and communicated to the market to inform consumer decision making;
opportunities to implement tailored approaches in recognition of high performance; and
- priority access to future packages and/or expansion into other aged care planning regions.

### 3.3 Establishing a strong industry

In order for the Government to deliver on its de-regulation agenda, it will be important for the aged care sector to develop a strong sense of industry that ultimately enables a strategic overview of the sector and informs sector activity and works with government and stakeholders in the development and oversight of the market. Providers would be part of the industry; the industry would work with government to develop industry standards, monitor and report on performance through co-regulation. This would facilitate market viability and inform policy. In addition the industry over time could take a leadership role in developing new business and practice models, shaping workforce models and supporting the education, training and development of the sector.

Key for government will be defining its relationship with the industry, how it seeks to work with industry bodies and the transition to potential co-regulation of the market over time.

### Some practical ways to achieve this:

- Establish an e-forum to enable ongoing engagement and collaboration with industry and providers to develop performance standards, build awareness and provide support for development.
- Provide information and incentives for the development of peer support networks.
- Adapt current training programs in the sector to better align with changing priorities of the sector, CDC, special needs provision.
- Work with educational bodies to introduce CDC to training and qualifications.
- Partner with other sectors such as disability to leverage training and development activity.
3.4 The role of government

A key consideration for government will be what role it seeks to take in the establishment, development and ongoing oversight of the aged care market linked to its core objectives for the aged care system and older people. Decisions on the role of government are informed by the deregulation and competition policy agenda.

3.4.1 Implications of the ‘de-regulation’ and competition policy agenda for home care

The Government’s commitment to reducing the regulatory burden is outlined in The Coalition’s Policy to Boost Productivity and Reduce Regulation policy, which was released in July 2013. In support of the policy, the Government has released an updated guide to regulation which sets out principles for reform and is aimed at encouraging policy makers to see regulation as an intervention of last resort. The Productivity Commission has also released a Regulator Audit Framework which establishes a framework for regulators to evaluate their performance. This recognises that how regulators work with regulated entities and interpret legislation can increase compliance costs and hamper productivity growth. The Department has developed a model framework to drive best practice regulation across the Department. The model framework recognises that some regulation is necessary to achieve the Government’s social objectives and to ensure the effective functioning of markets.

The Harper Competition Policy Review noted that governments are making significant changes across human services sectors, with policies reflecting the unique characteristics of each jurisdiction and the service in question. In particular the review noted that these changes include a clearer focus on user choice and innovation in service delivery. The Review recommended that each Australian Government should adopt choice and competition principles in the domain of human services. Recommended guiding principles that are pertinent to the home care and CDC context include that:

- Consumer choice should be placed at the heart of service delivery
- A diversity of providers should be encouraged
- Innovation in service provision should be stimulated, while ensuring minimum standards of quality and access in human services
- Governments should retain a stewardship function.

Some practical ways to achieve this:

- Leverage the Commonwealth’s regulatory reform agenda to establish a co-regulatory approach.
- Establish a forum for providers to come together to define and establish the industry and work with government to develop industry standards, ways to monitor and report on performance to facilitate market viability and inform the market development approach.
- Industry bodies take a stronger role in shaping new business and practice models.

2 Department of Social Services (2014) Working towards a model regulatory framework in the Department of Social Services.

The current policy settings for home care align with each of these principles. Accordingly, within this deregulation and competition policy context, it is appropriate to focus on the Government’s stewardship role in considering its potential areas of focus to support the development of the home care market and, through that, achievement of the home care policy objectives.

A key stewardship role is that of the market facilitator or enabler: setting up processes and platforms to enable consumers to have choice and control, and to develop a strong provider market. The following provides some initial considerations for government in the type of functions it may decide to hold / support as a market facilitator or enabler.

3.4.2 Information provision
An early and ongoing role relates to the provision of information. This is at four levels:

- Provision of information for consumers on the supports and services available in the market to support and enable choice and control; information on rights and obligations when accessing the aged care system; information on how to navigate the system. MyAgedCare has already been established as they key platform for delivery of consumer information.
- Provision of consumer feedback channels – the advocacy services and the complaints scheme provide opportunities for some kinds of consumer feedback, although the way in which this information is currently collated and reported is unclear and is not transparent. MyAgedCare also offers a potentially powerful platform for consumer feedback. Opportunities to utilise MyAgedCare to capture consumer feedback can be explored as its ongoing development and refinement continues over time.
- Provision of information to providers on regulatory requirements for entry into the sector; information on package availability and type to enable the market to respond and gear up accordingly – this information is already collected and published; however, its continuing utility and relevance needs to be monitored as the home care market evolves over time.
- Distribution of information on good practice and consumer experience.

3.4.3 Market development
As CDC becomes embedded and packages are portable, consumer patterns of behaviour will change. During the early stages of embedding CDC and portability of packages a role for government would be to support market development and sustainability. This could include:

- Mapping of different market and consumer segments to understand the profile of markets and availability of services
- Quantitative analysis of consumer behaviour in purchasing decisions (dependent on data availability)
- Identification of supply risks and potential market failures
- Development of intervention strategies and levers, both regulatory and non-regulatory, to support market development and minimise market failure.

3.4.4 Monitoring and oversight
A key ongoing role for government will be to oversight and monitor the performance of the market to ensure it is responsive to consumer need and can meet demand as required. This requires government to monitor activity and provide feedback to the market on activity and performance to facilitate
appropriate market responses. Such analysis would build on existing information sources and could include for example:

- Continued collection and reporting of base market information (i.e. number and distribution of packages by location and level, consumer cohorts and package levels)
- Collection and analysis of new market dynamics data to supplement the above base information (i.e. purchasing patterns of consumers, frequency of consumer provider changes and reasons for changes)
- Analysis and more transparent reporting of other relevant market data (i.e. use of decision supports and advocacy, characteristics of consumers using those services, more detailed interrogation of aged care complaints scheme data).

A mature industry could support government in this monitoring and reporting role (with appropriate safeguards, such as the independent advocacy services and complaints scheme). Ongoing analysis would support understanding of market dynamics to identify the need for new or different interventions as well as informing future policy decisions.
## 4 Summary of considerations

The following table summarises the policy considerations for government going forward in the implementation of the home care reforms.

*Table 2: Policy considerations*

<table>
<thead>
<tr>
<th>Area of focus</th>
<th>Short-term (2015-16)</th>
<th>Medium to longer term (2017 onwards)</th>
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<tbody>
<tr>
<td><strong>Operational and administrative parameters</strong></td>
<td>Clarify the interface with CHSP</td>
<td>Review the assessment approach</td>
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<td></td>
<td>Review sector communication strategies</td>
<td>Boost the focus on restorative practice</td>
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<tr>
<td><strong>Market and regulatory parameters</strong></td>
<td>Shared vision and expectations for a consumer-led market</td>
<td>Levers to lift performance and remediate poor performance</td>
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<tr>
<td></td>
<td>Develop portability framework</td>
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<td><strong>Consumer empowerment</strong></td>
<td>Information to support consumer choice and decision making</td>
<td>Safeguards for consumers as the market moves to self-regulation</td>
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<td></td>
<td>Independent decision supports</td>
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<td><strong>Provider capacity</strong></td>
<td>Targeted transitional support for providers</td>
<td>Levers to lift performance and remediate poor performance</td>
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<td></td>
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<td>Information to support understanding of consumer needs</td>
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<td><strong>Strong industry</strong></td>
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<td>Monitoring of performance</td>
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<td>Co-regulation</td>
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<td><strong>Roles of Government</strong></td>
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<td>Stewardship</td>
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<td></td>
<td>Provision of information</td>
<td>Market oversight and monitoring</td>
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*Source: KPMG*
4.1 Next steps

This paper has provided a high level overview of a number of policy implications arising from the evaluation. Should there be agreement as to the importance and relevance of these matters it will be necessary to explore them in more detail with greater granularity around market development and design and key actions and steps to support the achievement of the government’s objectives for the home care sector.