

**For discussion  
on 10 February 2014**

**Legislative Council Panel on Welfare Services**

**Pilot Scheme on  
Living Allowance for Carers of the Elderly Persons  
from Low Income Families**

**PURPOSE**

The Community Care Fund Task Force (CCFTF) under the Commission on Poverty (CoP) will be invited by the Government to explore the feasibility of introducing a pilot scheme funded by CCF to provide a living allowance to carers of elderly persons (carers) from low income families (Pilot Scheme). This paper sets out the proposed features of the Pilot Scheme.

**EXISTING SUPPORT FOR CARERS**

2. We are conscious of the immense challenges posed by our rapidly ageing population. We will adhere to our objective of promoting the well-being of the elderly in all aspects of their life by providing them with services that will enable them to remain members of the community for as long as possible, and, where necessary, by making available residential care suited to their varying needs. In the process, we are mindful of the need to provide our senior citizens with dignified choices while preserving our cherished virtue of self-reliance and family support.

3. Many senior citizens in our community are being taken care of by their family members (who are generally referred to as “carers”). We have been providing a number of support services to empower the carers and help relieve their stress. At present, the District Elderly Community

Centres (DECCs), Neighbourhood Elderly Centres (NECs), home care service teams and Day Care Centres/Units for the Elderly (DEs/DCUs) throughout the territory are providing support services to carers of elderly persons. Such services include the provision of information, training, counselling services, assistance in forming carers' mutual-support groups, establishment of resource centres, and demonstration and loan of rehabilitation equipments, etc. Respite residential and day care services for the elderly persons are also available which will enable carers to take a short break when needed.

## **PROPOSED PILOT SCHEME ON CARER ALLOWANCE**

4. In addition to the need for practical and psychological support, carers who come from low income families may need some financial assistance to help supplement their living expenses. However, providing a living allowance to carers, which is based on a cash-based approach, is new in Hong Kong. The Government considers it prudent to explore the feasibility, impact and effectiveness of this approach through a pilot project, and CCFTF will be invited to consider introducing such a pilot scheme for a duration of two years.

5. In devising the parameters, we consider that the following key principles should be observed –

- (a) the proposed allowance should not weaken the sense of family obligation nor diminish the virtue of filial piety;
- (b) it should target at those who are most in need; and
- (c) the Pilot Scheme should be easy to administer to enable an early start.

The main features of our Pilot Scheme are set out in paragraphs 6 to 12 below. We have made reference to the arrangements applicable in some other jurisdictions, taking into account also the views expressed by local non-government organisations and interested parties (e.g. the Elderly

Commission, carer support groups, etc.) in an earlier engagement exercise conducted by the Chairman of CCFTF and the Administration.

(a) Eligibility criteria

6. We propose the following eligibility criteria:

- (i) *Provide care to elderly person(s) who have been assessed by the Standardised Care Needs Assessment Mechanism for Elderly Services (SCNAMES) of the Social Welfare Department (SWD) to have impairment at moderate level or above*

For the purpose of the Pilot Scheme, it is proposed that a carer is the person taking care of an elderly person having assessed by SCNAMES to have impairment at moderate level or above and is waiting for subsidised long term care services (i.e. residential care services (RCS) and/or community care services (CCS)) on the Central Waiting List (CWL).

- (ii) *Minimum hours of care-giving*

In some other places, similar schemes require a carer to provide minimum hours of care-giving. For example, the Australian carer allowance scheme requires a carer to provide at least 20 hours of personal care per week on a daily basis. In the United Kingdom, a carer is required to provide at least 35 hours of care per week and the elderly person being taken care of is required to sign and confirm the hours of care-giving by the carer concerned. We propose a more flexible arrangement for our proposed Pilot Scheme whereby a carer is required to provide at least 80 hours of care-giving<sup>1</sup> per month. A carer will be invited to keep a brief record of his/her care services and hours in a form to be prescribed by SWD which will pay the carer allowance as referred to in paragraph 7 below, if and when the

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<sup>1</sup> The care provided by the carer to the elderly person refers to independent activities of daily living, such as meal preparation, home making, medication management, purchase of daily necessities, and escort, etc. and/or activities of daily living, such as personal care assistance in mobility, dressing, toileting, and personal hygiene, etc. as required by the elderly person concerned.

minimum hours of care-giving provided has met or exceeded the above-mentioned threshold. We propose that such a written record should be certified correct by the carer concerned himself/herself and that the elderly person under his/her care is not required to additionally certify such written record. However, if SWD would wish to verify the correctness of any such record submitted by a carer, SWD may seek clarifications from the elderly person under his/her care.

*(iii) Capable of taking up the care role*

For some carer allowance schemes in other places, the eligibility criteria include age limit and/or other conditions such as the carer must be a family member of the elderly person being taken care of. We consider that we should not impose such rigid criteria for our proposed Pilot Scheme, though we should ensure that the carer is fit and capable of taking up the care-giving role as assessed by a service delivery agent as referred to in paragraph 9 below, having regard to the guidelines to be issued by SWD. As a general rule, a person who is himself/herself being assessed by SCNAMES as moderately or severely impaired or is on CWL waiting for subsidised long term care services or a person who is a recipient of Disability Allowance shall be deemed to be not being fit and capable of providing care to an elderly person as referred to in paragraph 6(i) above and therefore will not be eligible for the allowance.

To ensure that carers under the Pilot Scheme will have the necessary skills for providing constant care, they will be required to attend the training programmes offered by DECCs, NECs and other suitable organisations within a certain period of time as advised by the service delivery agents. Such programmes cover basic skills and knowledge in the care of elderly persons, including communication skills with elderly persons, day-to-day care know-how, etc. Carers may also attend some other specific training programmes as considered appropriate by the service delivery agents, e.g. those related to care for demented elderly persons, depending on the situation of the elderly person under his/her care. The training hours attended by the carers may be counted towards the hours of

care-giving as stated in paragraph 6(ii) above. If the carers are required to pay for the training programmes as advised by the service delivery agents, the fees may be reimbursed by SWD upon satisfactory completion of the courses.

*(iv) A Hong Kong resident not in any employment relationship with the elderly person being taken care of*

We propose that a carer eligible for inclusion into the Pilot Scheme should be a Hong Kong resident not engaged in any form of employment relationship with the elderly person(s) of whom he/she is taking care of.

*(v) From low income family whose household income is at or below 75% of Median Monthly Domestic Household Income*

We propose that the recipients of carer allowance cannot at the same time receive Comprehensive Social Security Assistance or Old Age Living Allowance<sup>2</sup>. The Pilot Scheme will be experimented under CCF. To follow the income assessment requirement adopted in most CCF projects, the carer's household income could be at or below 75% of the Median Monthly Domestic Household Income.

(b) Amount of allowance

7. The amount of allowance is proposed to be set at \$2,000 per month for each eligible carer. For each of those carers who takes care of more than one elderly person at the same time and is assessed by the service delivery agent to be fit and capable of doing so, he/she may claim up to \$4,000 per month, subject to the hours of care-giving being no less than 120 hours per month. The allowance will be offered to eligible carers at the end of each calendar month by SWD, as referred to in paragraph 6(ii) above.

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<sup>2</sup> Consideration will be given to the interface with the proposed Low-Income Working Family Allowance (LIFA) when formulating the implementation details of LIFA. We will also give regard to the comprehensive review of the Work Incentive Transport Subsidy Scheme to be conducted by the Government around October 2014.

(c) Interface with subsidised CCS

8. For the elderly persons who are being taken care of by carers under the Pilot Scheme, they may apply or continue to apply for subsidised CCS. Service providers of subsidised CCS would make professional assessment on the service mix applicable to such elderly persons, taking into account the care-giving provided by the carers and having regard to the circumstances of individual cases. For example, if an elderly person is being taken care of by a carer at home, his/her service provider may recommend less personal support services (e.g. home-making, meal delivery, escort, etc.) or may not recommend any full-time day care services.

(d) Service delivery agents

9. It is proposed that DECCs and NECs would be engaged as service delivery agents to provide the carers under the Pilot Scheme with support services such as the provision of information, service referral, counselling service, etc. The service delivery agents will be tasked to assess the care-giving capabilities of the carers under the Pilot Scheme, identify the training programmes for the carers, conduct home visits and review the condition of the elderly persons concerned. They will also maintain close liaison with relevant Responsible Workers<sup>3</sup> of the elderly persons being taken care of. A service fee, on a per-carer basis, may be provided by the Government (through CCF) to the DECCs/NECs concerned for their service.

(e) Timeframe and implementation

10. The Government will submit a proposal for consideration by CCFTF in March 2014. Subject to the views of CCFTF, the proposal

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<sup>3</sup> Each elderly person on CWL is being taken care of by a Responsible Worker (RW) regarding his/her long term care services application. The roles of an RW include making CCS referrals, keeping in view applicants' conditions and welfare needs while the applicants are on the waiting list for long term care services and provide services as appropriate, explaining the assessment result to the applicants and following up the welfare needs of the applicants accordingly.

will be put to CoP for endorsement, in time for SWD to launch the Pilot Scheme by the end of the second quarter of 2014.

11. As at the end of December 2013, there were about 18 000 elderly applicants on CWL who were living in the community and waiting for subsidised residential care places and/or eligible for subsidised CCS. However, SWD does not keep any record on the profile of carers of the applicants on CWL and is not in a position to estimate the number of carers eligible for the proposed allowance. For the Pilot Scheme, we propose to provide 2 000 eligible carers with the allowance. The estimated cost is about \$120 million in the two-year pilot period.

(f) Evaluation and review

12. An evaluation will be conducted during the two-year pilot period to assess the implications and effectiveness of the Pilot Scheme. Feedback from beneficiaries, non-governmental organisations, interested groups, service delivery agents, etc., on the Pilot Scheme will be collected. As the Pilot Scheme will be launched under CCF, we propose to largely follow the prevailing practices in other CCF projects when designing some of the parameters of the Pilot Scheme. We shall nevertheless review these parameters in the context of the evaluation.

## **ADVICE SOUGHT**

13. Members are invited to offer their views on the proposal.

**Labour and Welfare Bureau  
Social Welfare Department  
February 2014**