



foresight

The journal of futures studies, strategic thinking
and policy

A society for all ages

Guest Editors: Sohail Inayatullah and Colin Blackman



Table of contents

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Guest Editors: Sohail Inayatullah and Colin Blackman

Departments

Access this journal online	2
Editorial	3
Note from the publisher	73
The Centre for Future Studies	74
Index to vol. 5, 2003	75

Feature articles

Preparing for the future: Queensland 2020 4

Leona Reif, Nusch Herman and Genevieve Graves

This paper examines the Queensland 2020: A State for All Ages project which aims to encourage whole-of-government and community debate on the structural ageing of the population and the interconnected needs of all generations. It focuses on government planning frameworks and aims to generate a transformational shift in how government, business and community organisations view the ageing of the population.

Ageing: alternative futures and policy choices 8

Sohail Inayatullah

An ageing society challenges basic assumptions of modern culture and political economy. This paper explores alternative futures of ageing in Queensland and policy recommendations are developed for the Queensland Government.

A framework for intergenerational planning 18

Mel Miller and Ian Siggins

Terms such as "intergenerational planning", "intergenerational redistribution", "intergenerational equity" and "intergenerational accounting" have all gained currency in recent years. This paper reviews recent debates about how to assess the extent and nature of future need, outlines some scenarios, and describes some of the principles that have been adopted for intergenerational planning.

An ageing perspective 26

Helen Bartlett

The consequences of population ageing for Australia are increasingly debated at a national and state level. This paper explores the evidence on community perspectives and attitudes on ageing and the extent to which it has informed policy and program development.

Youth voices: young Queenslanders' values in a time of structural ageing 34

Marcus Bussey

A key aspect of the debate on structural ageing is the views of young people. This article tackles issues pertaining to community images and perceptions of youth as embedded in popular media and psyche.

City of the aged versus City of all ages 43

Phillip Daffara

In this article the author deconstructs the polar cultural myths about ageing and how these two influencing memes generate two contrasting scenarios for the future of the city. He also suggests that mimetic change of Western society's episteme of ageing is fundamental to achieving the City of all ages.

Women's working futures – views, policies and choices 53

Monika Merkes

The focus of this paper is on women of the baby boom generation, their working futures and the issues that will influence their work-retirement transition. This is explored from the viewpoint of Australian women and from a social policy perspective.

Ageing: a personal futures perspective 61

Verne Wheelwright

Futures research is commonly reported on the macro scale, and involves analysis of a global or national situation with a long-range view of trends and alternative futures. This article approaches ageing and the future from the micro scale, examining the future one life at a time; suggesting that futures methodology can, and should, be effectively applied to individual lives.

Liberating imagination about ageing 69

Bliss W. Browne

In this paper the author suggests that we are in the midst of a positive ageing revolution and a revolution in the workplace as well. Her paper considers whether the purpose of increased longevity might enable us to express our untapped potential for building a new and better world.

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A society for all ages

Over the past 20 years governments in many industrialised nations have become increasingly concerned about the strain an ageing population would place on health, welfare and pension systems. The issue of ageing is frequently presented in a divisive way: as people live longer and birth rates are falling, how will society (we) pay for the elderly (them) in the future? The prescription seems to be that taxes will have to rise, the retirement age will have to go up, and pension benefits will have to be reduced. Some have argued that governments are creating an unnecessary climate of fear in order to force through unpopular change in the welfare system (Shaw, 2002).

Without doubt there are some difficult decisions that need to be faced, but the issue needs to be reframed. An alternative, futures approach is to view the ageing of the population as an issue not just for older people but for everyone in society, no matter what age. Rather than the negative way in which the issue is typically discussed, we should be taking an intergenerational approach. Instead of setting young against old, we should be seeking policies to create a society for all ages.

This issue of *Foresight* takes such an approach. At the core of this edition is a set of “stimulus papers” prepared for the Queensland Government in Australia as part of its project Queensland 2020: a State for all ages. The project aims to encourage whole-of-government and community debate on the structural ageing of the population and the interconnected needs of all generations. It focuses on government planning frameworks and aims to generate a transformational shift in how government views the ageing of the population.

The four “stimulus papers” look at ageing from different perspectives – a futures perspective (Sohail Inayatullah), a youth perspective (Marcus Bussey), an ageing perspective (Helen Bartlett), and a planning perspective (Mel Miller and Ian Siggins). These articles are supplemented by others who consider ageing from the point of view of future urban design (Phillip Daffara), women’s working futures (Monika Merkes), and ageing at the personal or individual level (Verne Wheelwright). Finally the issue concludes with a call from Bliss Browne to liberate our imagination on the subject of ageing.

Sohail Inayatullah and Colin Blackman

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Preparing for the future: Queensland 2020

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Keywords Australia, Population policy, Social structure, Ageing (biology)

Abstract By applying a futures approach to ageing of the population, Queensland has the opportunity to plan for changing aspirations of all of society – working to achieve identified preferred outcomes for society, rather than planning for problems or just for a specific target group. *Queensland 2020: A State for All Ages* is a project that aims to encourage whole-of-government and community debate on the structural ageing of the population and the interconnected needs of all generations. It focuses on government planning frameworks and aims to generate a transformational shift in how government, business and community organisations view the ageing of the population. To focus community debate and inform government planning, the project identified four key areas and commissioned academic stimulus papers to address these issues from an intergenerational perspective. These four areas were a futures focus; an ageing perspective; a youth perspective; and a human service planning perspective.

Queensland – a profile

In 2001 the population of Queensland was more than 3.6 million, which is 19.3 per cent of the total Australian population.

Queensland boasts an enviable climate, booming economy, spectacular natural features and a relaxed lifestyle. Brisbane, the capital city of Queensland, is a modern, sophisticated city of 1.6 million people, with a focus for the arts, education, commerce and government. It is a river city that reflects a casual yet vibrant lifestyle.

There are three levels of government in Australia – local, state and federal. At the state level, Queensland has a parliamentary system of government, based on a representative democracy. Our system of government is sometimes referred to as the “Westminster system”, after the British Parliament in the Palace of Westminster, London.

In June 2002, the Queensland Government delivered its cornerstone policy statement for families – Queensland

Families: Future Directions, which introduced the strategic priorities of prevention and early intervention; connections and re-connections; and working smarter. The agency responsible for the implementation of this policy is the Queensland Department of Families, an agency that provides and supports a range of human services, both directly and through the service providers it funds, to a wide cross section of Queenslanders in need including:

- neglected or abused children;
- young offenders;
- people with a disability;
- older people;
- people who are homeless or disadvantaged;
- families experiencing domestic violence;
- families in crisis or threatened by breakdown; and
- families using child care services.

These services specifically contribute to the Government’s policy priorities relating to community engagement, a better quality of life and safer and more supportive communities.

Responding to change

One initiative of this policy statement is *Queensland 2020: A State for All Ages*, a project that aims to encourage whole-of-government and community debate on the structural ageing of the population and the interconnected needs of all generations. It focuses on government planning frameworks and aims to generate a transformational shift in how government views the ageing of the population. The project will be broader than the interests of the Australian



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baby-boomers, born between January 1946 and December 1965, and will consider the interests of the whole population.

To focus community debate and inform government planning, the project identified four key areas and commissioned academic stimulus papers to address these issues. The papers were presented and debated in a forum, with panel members from academia, local government, and the community. In addition to the four stimulus papers, the panel speakers were also drawn from the local government sector and local indigenous groups. Forum participants included a targeted audience of academics, Queensland Government agencies and key interest groups and individuals.

The stimulus papers commissioned were:

- Futurist perspective – Professor Sohail Inayatullah's paper focussed on the concept of difference, intergenerationality, and the role of government and agency in creating desired futures.
- Youth perspective – Marcus Bussey's paper tackled issues pertaining to community images and perceptions of youth, as embedded in popular media and psyche.
- Ageing perspective – Professor Helen Bartlett's paper offered an informed and challenging synthesis of the issues resulting from structural ageing in Queensland.
- Planning framework for human services – Professor Ian Siggins and Dr Mel Miller focussed on planning frameworks, proposing the general theme, "Predicting the future has less value than attempting to create it".

Starting a conversation

The search forum, conducted in Brisbane, Queensland (April 2003), was a one-day event designed to generate debate about how government, community and industry respond to the ageing of the population, and begin to develop collaborative responses to this issue. Taking an intergenerational approach is an integral part of the project, with targeting of younger people for attendance at the forum a specific strategy.

Examining the interconnected needs of all generations raised new dimensions of ageing of the population impacts for both younger and older attendees, who had previously been exposed to the media interpretation of an ageing population as a problematic issue and one that would divide society across age groups. Most publicity in Australia relating to ageing of the population has focussed on the increasing cost burden of an older population, in the main overlooking the balancing effect of the significant contribution older people make to the community, and society's changing values and expectations.

An example of issues raised in the forum is the impact of increased voting power of the older population, an already strong political lobby group referred to as "grey power". Younger people discussed the need for political empowerment and the responsibility of older people to

consider the interconnected needs of all generations in the exercise of this power. The theme of ancestors of the future was strong, looking toward the wellbeing of the younger and future generations as a balance to current planning processes, which tend to focus on one age/target group or another without reference to the interdependent nature of the society.

The views presented and issues raised at the search forum have informed the ongoing policy work that is currently being undertaken by the Queensland Government. In addition, a cross-agency policy network group was established in February 2003 to create a "policy community of interest" linking other activities in Queensland Government agencies, and ensuring a whole-of-government perspective.

Queensland's ageing population

The age-related demographic changes taking place within Queensland communities present a range of political, economic, social, environmental and technological challenges for the community. Rather than being seen as an insurmountable problem, the ageing of the population should be seen as an opportunity to celebrate and benefit from the enormous gains in longevity. A challenge will be to change public perceptions of ageing to reflect the vitality and diversity of older people and to heighten understanding of the significant contributions that older people make to our communities.

The anticipated reshaping of Queensland's demographics is attributed to structural rather than numerical ageing, and is therefore primarily about the proportion of older to younger people, rather than the actual numbers of each age group. Queensland's population aged 65 years and over is projected to increase from 11.5 per cent in 2001 to about 17 per cent in 2021, while at the same time, the absolute number of older people is projected to more than double from 407,000 to some 825,000 people (Australian Bureau of Statistics, 2001).

The proportion of children in the Queensland population overall is decreasing with the proportion of 0-14 year olds predicted to fall from 21 per cent in 2001 to 14.8 per cent by the year 2051. In Australia, the number of people aged 65 years and over is not projected to exceed the number of children aged 0-14 years until around 2020 (Australian Bureau of Statistics, 2003).

The median age of the Queensland population has increased from 28.9 years in 1981 to 34.8 years in 2001. The Australian Bureau of Statistics projects the median age to be around 40.3 years in 2021 and 43 years by 2051 (Australian Bureau of Statistics, 2003).

Queensland's indigenous population is younger than the general population. It has a higher birth rate and much lower life expectancy. In 2001, approximately 40 per cent of the Queensland indigenous population were under the age of

15 years, compared with 21.3 per cent for the general population (Australian Bureau of Statistics, 2002).

While the life expectancy for non-indigenous Australians is amongst the highest in the Western world, this contrasts sharply with the life expectancy for Australia's indigenous people, currently about 25 years lower than the general population. In 2001, the median age at death was 52.5 years for indigenous men and 54.1 years for indigenous women, compared to median age at death for the total Queensland population of 74.7 years for men and 81.4 years for women (Australian Bureau of Statistics, 2002). Although indigenous life expectancy is increasing, strong commitment and action is still needed from all levels of government and the community.

Given the range of statistical information available on this issue, and the long time frame in which it is presented, the year 2020 has been identified as when Queensland as a society will begin to feel the impacts of the change, when the changing proportions of age groups will become noticeable in day to day life.

Future directions

Queensland needs new approaches to respond positively to this issue. Dilemmas and difficulties are inherent in adopting a long time frame, as governments are generally in the business of responding to the needs of the community and individuals over a time frame of three to five years. There are always exceptions to this, but in the main we are directed by the current needs and expectations of the community, influenced by lobby groups and peak organisations, media and the election cycle.

With ageing of the population, we have the opportunity to start considering the issues that may arise, and establish planning and policy processes that will prepare us for the anticipated change. It represents an opportunity to plan for changing aspirations of all of society – working toward identified preferred outcomes we want to achieve for the society, rather than planning for problems or just for a particular target group.

Queensland 2020: A State for All Ages is a whole-of-government project attempting to address this issue by taking a positive, but realistic interconnected approach to the changing demographics.

The project is posing two questions:

- What opportunities and challenges will arise for the Queensland Government in responding to ageing of the population? and
- What are the key elements of a future policy environment that supports a confident intergenerational approach?

There are a number of significant reasons for the project to take an intergenerational approach to this issue. The ageing of the population is an issue not just for older people but for all ages. Policies that include young people, and promote connections across generations are vital to achieving an

age-inclusive society. In taking an intergenerational approach, and considering impacts on future generations, we are seeking effective responses that take account of all stages of the life cycle and are adaptable to our changing circumstances over the next 20 years.

Intergenerational approaches build respect between generations. This is necessary where generations have been separated by their social activities and stereotyping of different age groups. In taking an intergenerational approach we lay the foundations for developing policies and programs that create equity, well being, social cohesion and sustainability.

The views of young people are critical to understanding the ageing of the population issues. With significant growth predicted in the number of people leaving the workforce as the baby-boomers reach retirement, the supply of work for younger people is expected to increase. More young people are also likely to have caring responsibilities for elderly parents. Government, business and community organisations have a responsibility to support and encourage young people to realise their full potential through education, cultural interests and community support. We need to ensure that young people are not disadvantaged by the way society responds to the demands of other age groups.

In fact it is virtually impossible to consider the ageing of the population without taking an intergenerational approach. For example, how do we discuss urban planning and development without taking into account the needs of our young people (or indeed the needs of future generations) for access to employment, while at the same time thinking about how we support older generations to age in their own communities, maintain healthy lives and continue to contribute to society?

The second key approach of this project is to take a “futures focussed” perspective. Changing technology and changing needs and aspirations of the community mean that it is impossible to predict either program service models or individuals' preferences for them. For example, many existing job categories may not exist by the time today's young people are in their middle years and it is estimated that 70 per cent of the job categories, products and services of the year 2020 are yet to be invented (Ellyard, 2001).

In 20 years time we can expect the world to be as different again from the environment that we knew 20 years ago, and for this reason we have taken a futures focussed approach. We are premising this future focussed perspective on the notion that the underlying values of today will be the reality of the future. To respond then to this future we must tap into the dreams and values of our society. And added to this we must tackle the more difficult issue of age-based perceptions – unfortunately ageism is inherent in our culture, even among older people themselves. And while ageism may mean that some younger people ignore the diversity and experience of

older people, some older people also disregard the rich contribution that young people make to our communities.

The Queensland Government would like to maximise the opportunities offered by a longer life. Our society cannot do without the experience and commitment of older people. The ageing of the population provides the opportunity to celebrate and benefit from the enormous gains in longevity that have occurred over the past century. A challenge will be to change public perceptions of ageing to reflect the vitality and diversity of older people and to heighten understanding of the significant contributions that older people make to our communities.

Conclusion

Queensland 2020: A State for All Ages is being developed to ensure that Queensland will continue to be a good place to live into the future. It will reflect the diversity of our population and continue the Queensland Government's commitment to develop policies and programs that build an age inclusive society and strengthen the social and economic success of our state. This project has adopted a futures focussed approach in the hope of developing innovative solutions to the key questions posed.

The Queensland Government is of the view that our society can address the challenges of an ageing population and reveal the new opportunities that come with the changing demographics. By planning now we can develop awareness of the potential impacts of population ageing on government, business and community sectors. In doing so,

we hope to help all sectors take full advantage of opportunities, improve quality of life and maximise the potential to build good understanding between generations. Community, government and business need to respond to changes as they happen and recognise that aspirations of the community will change as well.

The role for all of us in the community is to focus on the positives, understand the values that are shaping the future and work to minimise the potential negative aspects such as intergenerational conflict and detachment.

Further information on this project can be accessed at: www.families.qld.gov.au

By entering Queensland 2020 in the search function you will access the full range of information on this project.

Or e-mail any direct responses or queries to: qld2020@families.qld.gov.au

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Ageing: alternative futures and policy choices

Sohail Inayatullah

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Keywords Australia, Government policy, Population

Abstract Ageing is a fundamental issue for the future of the planet. An ageing society challenges basic assumptions of modern culture and political economy. This paper explores alternative futures of ageing in Queensland, understanding that certain assumptions about Queensland's future are given. It is also focused on probable futures, and not on every possible future. Based on this map of the future-developed through causal layered analysis and scenario planning – policy recommendations are developed for the Queensland Government.

Policy approaches

A Futures policy approach is used, as traditional policy approaches while important, are limited by their temporal framework. Along with futures oriented policymaking, there are four other main policy frameworks:

- (1) cost-benefit;
- (2) problem-oriented;
- (3) political-oriented; and
- (4) vision-oriented.

The strength of cost-benefit policymaking is that it has a clear bottom line – that of economic benefits and costs. However, most recently this economism has been challenged by the triple bottom-line approach, suggesting that additional costs and benefits need to be accounted for – specifically, the social and the environmental.

Problem-orientation policymaking is focused on solving issues as they appear. These can be immediate crises or they can be issues bubbling up directly through citizen action or through the media. Problem policy is beneficial as government is doing what it is elected to do resolving the issues and concerns of the public.

Political-oriented policymaking has two dimensions. The first is wherein costs and benefits and problems are coloured by the ideology of the party in power. The second dimension to this is far less about the party in power but about the bureaucracy, which seeks to frame and colour issues irrespective of whom is in power.

Vision-oriented policymaking is concerned about the desired future, moving government – through partnership with business, church, non-governmental organisations and concerned citizens along with actors – toward a desired vision of the future.

Futures-oriented policymaking challenges and utilises all these frameworks. It seeks to redress the temporal myopia of cost-benefit analysis by including the costs of the future. In this sense, the impact on future generations may be the fourth bottom line. It seeks to address the limitations of problem-

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This paper is not essentially about predicting the future. Rather it is about exploring the alternative futures of ageing in Queensland, and understanding that certain assumptions about Queensland's future are given. It is also focused on probable futures, and not on every possible future. Thus, the discovery of a "gene" or some other technological marvel that would for all practical purposes end death is not entertained. While we are sympathetic to Woody Allen's observation that "while some people want to die with dignity, I just want to live forever", our goal in this paper to map the futures of ageing, with particular concern that ageing cannot be seen in isolation of other generational age groups (thus, a society for all ages). Based on this map of the future-developed through causal layered analysis and scenario planning – policy recommendations are developed for the Queensland Government.



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orientation by anticipating issues before they become problems. Once issues become problems, government is often shackled by the emotive nature of the problem. Clear sides and positions have been drawn. Through futures-oriented policymaking, not only can issues be anticipated but the roots of issues can be addressed, since they can be tracked through their full life cycle. Futures-oriented policy challenges political-oriented policy by suggesting that the clarity of the desired future is required so that citizens can understand how current decisions will impact the future. Politics thus can become less about partisan issues and more about negotiating desired futures. Futures-oriented policy certainly works closely with vision-oriented policy but seeks to ensure that the vision is shared, participatory, and is informed by changing events and trends. Visions need to both pull society forward but also need to be flexible, having the capacity to accommodate change.

Futures-oriented policy thus expands, broadens and deepens the policy process by focusing on:

- the implications of current decisions on the future;
- anticipating emerging issues and trends before they become problems;
- mapping alternative futures so that more effective decisions can be reached today, that is, by using the future to transform today;
- extending the temporal horizon so that costs and benefits include future generations;
- embedding flexibility into the vision of the future; and
- developing processes so that policy remains a living practice – anticipatory action learning.

When the issue of the future is raised, more often than not allusions are made to forecasting. Forecasting, however, is only one way to “use” the future. There are other purposes to the future.

Multiple purposes of the future

First, to develop strategy. Given the reality of an ageing Queensland, what should individuals, companies and Government do? What are the opportunities and challenges ahead?

Second, to gain citizen input and gain participation. Essentially this is the notion that moving toward a Society for All Ages cannot occur merely by Government fiat, or indeed, by vision given from high above. While leadership may offer the vision, the visioning process must be a participatory one, including all relevant stakeholders and worldviews. This not only ensures buy-in, but also assures that the variations of the vision – differences – strengthen the overall vision. This is especially important so as to ensure intergenerational views on a preferred vision of ageing. Citizen input is thus also about worldview input. The notion of worldview implies that ageing should not be seen in a uniform way. There exist gendered, cultural and life cycle dimensions to ageing. More important is that the aged should not merely be objects of research but should participate in the design of alternative futures. Their subjectivities are crucial to understanding the futures of ageing.

Third, as education – that is, the future serves as a way to train government employees, Queensland leaders, and citizens about how to deal with an ageing society. This means using futures methods and tools – emerging issues analysis, the futures triangle, causal layered analysis, visioning, backcasting – to better understand the future.

Education about the future means rethinking the notion of one career for life, since the notion of life is being extended. This means multiple careers during the life course, numerous careers at the same time, or ...

Futures as education also makes the important distinction between education about the future (maps and models), education for the future (tools used to create a specific preferred future) and education about alternative futures. This latter dimension assumes that the future cannot be accurately forecast but that alternative futures – policies and actions – can be explored, and that this exploration can lead to more effective policymaking.

Education about alternative futures is essentially about using the future for the fourth purpose, capacity enhancement, that is, to develop the capacity to negotiate the many challenges brought on by an ageing society. Capacity enhancement is thus not about any particular goal or even vision but about creating the societal capacity to negotiate with change, even dramatic change (as for example with the possibility of significantly extended life expectancy). Essentially this is about a society that is a learning community (or communities) that reflects and learns from its mistakes and moves forward. A learning community has the following characteristics, as applied to ageing futures:

- *Flexible* – moving beyond the agricultural and industrial model of society. For the ageing discourse, this is the agricultural model of many dying young and the few who survive, by definition becoming wise elders. However, with many more people ageing, wisdom may not be guaranteed. In the industrial model, ageing was essentially the end of life, after retirement, one slowly died (especially for men). For women, it was both a time of loneliness but also of independence.
- *Responsive* – adjusting to the needs of market, community and state, globally and locally. This means ascertaining new products and services for the ageing and new careers for the aged. This could mean asking – What are the most appropriate uses of digital technologies for creating more socially inclusive communities?
- *Anticipatory* – develop models of thinking to envision and plan for alternative futures. This could mean asking – What alternative political frameworks are required for ageing? Does representational democracy still work in an age-divided world, or should the youth have a certain percentage of seats reserved in parliament?
- *Innovative* – seeing ageing as an opportunity to rethink current institutions, to question our basic paradigms of health, life, and death.
- *Leadership plus participation plus expertise*. Any new problem faced by society needs all sorts of information and knowledge. It cannot be solved by one sector alone,

rather, leaders plus citizens plus experts are required to move forward – that is, evidence-based policy with vision and participation.

- *Learning plus healing* – a learning community cannot just be about information and knowledge, there is an emotive side to this – the heart as brain. Ageing must be seen as embodied and engaged issues. To begin with this means facing head-on the fears of youth (of being denied their future) and of the aged (of being left out to pasture).
- *Microvita* (that reality is idea and matter based)[1] – a learning community, of course, is more than just its members. It is the collective, including archetypes and unconscious fields of awareness.

Fifth, to use the future to move toward emergence, that is, toward the edge of order and chaos, where system transformation is possible. This means a societal conversation about ageing futures where foundational assumptions (as opposed to instrumental questions) are challenged, even if incrementally.

Sixth, as memetic organisational transformation, that is, the future is used to enter new memes (an idea that replicates, moving from brain to brain)[2] in the organisations that challenge old memes. We are seeing this in city futures in the move from the city as defined by the roads, rates and rubbish meme to that of the smart-international-green city.

As well, if we examine the traditional organisation, the dominating meme was work 9/5, work hard, retire and then die. A few decades ago, this changed somewhat because of globalisation to up-skilling and retraining along with adaptability and flexibility began to define the organisation (downsizing was of course central to this). Most recently, the meme has become the learning organisation. The new meme is learning plus healing organisation (taking into account employee's health, the impact of the organisation on the environment and the organisation as a family – essentially, the triple bottom-line approach). Whether it will be selected because of advantages it offers is not clear at this stage, however.

New memes for ageing include WHO's Active Ageing[3], the Omega Institutes'[4] Conscious Aging and Productive Aging[5]. None, however, have become currency. Given the notion of Queensland as the smart state, perhaps smart ageing may be an appropriate new meme for the state.

Memes are thus ideas that transform, as opposed to ideas that inform (the educational perspective) or ideas that empower (strategy, capacity building, and citizen engagement).

Uses of the future:

- strategy;
- citizen input;
- education;
- capacity enhancement;
- emergence; and
- memetic transformation.

The future thus can have multiple uses. This policy futures paper takes the perspective of alternative futures. It is not

focused on any particular preferred future nor does it assume that the future is given, even if the demographic trends may appear overwhelming. There are still choices to be made.

To explore these choices, the two methods, Causal layered analysis (CLA)[6] and Scenarios will be employed.

CLA

CLA assumes four levels of analysis.

The first level is the "litany" – quantitative trends, problems, often exaggerated, often used for political purposes – (problems associating with an ageing population used to change – Medicare or superannuation[7], for example) usually presented by the news media. Events, issues and trends are not connected and appear discontinuous. The result is often either a feeling of helplessness (what can I do? it is too overwhelming) or apathy (nothing can be done! as demographic patterns cannot be easily changed) or projected action (why do not they do something about it? It is government's responsibility). This is the conventional level of most futures research that can readily create a politics of fear[8]. The litany level is the most visible and obvious, requiring little analytic capabilities[9]. Assumptions are rarely questioned.

The second level is concerned with social causes, including economic, cultural, political and historical factors (dropping birth rates, medical advances). Interpretation is given to quantitative data. This type of analysis is usually articulated by policy institutes and published as editorial pieces in newspapers or in not-quite academic journals. This level excels at technical explanations as well as academic analysis. The role of the state and other actors and interests is often explored at this level. The data is often questioned, however the language of questioning does not contest the paradigm in which the issue is framed. It remains obedient to it.

The third deeper level is concerned with structure and the discourse/worldview that supports and legitimates it (economistic forecasting and governmentality, for example). The task is to find deeper social, linguistic, cultural structures that are actor-invariant (not dependent on who the actors are). Discerning deeper assumptions behind the issue is crucial, as are efforts to revision the problem. At this stage, one can explore how different discourses (civilisational views on ageing, for example) do more than cause or mediate the issue, but constitute it. It investigates how the discourse we use to understand is complicit in our framing of the issue. Based on the varied discourses, discrete alternative scenarios can be derived here; for example, a scenario of the future of ageing based on technology, versus a values based scenario focused on the entire life cycle. These scenarios add a horizontal dimension to our layered analysis. The foundations for how the litany has been presented and the variables used to understand the litany are questioned at this level.

The fourth layer of analysis is at the level of metaphor or myth. These are the deep stories, the collective archetypes – the unconscious and often emotive dimensions of the problem or the paradox (the search for the fountain of youth, elders are wise, for example are two operating myths). This level provides a gut/emotional level experience to the

worldview under inquiry. The language used is less specific, more concerned with evoking visual images, with touching the heart instead of reading the head. This is the root level of questioning. Questioning itself however, finds its limits since the frame of questioning must enter other frameworks of understanding – the mythical, for example.

This fourth level takes us to the civilisational level of identity. This perspective takes a step back from the actual future to the deeper assumptions about the future being discussed, specifically the “non” – or “post-rational”. For example, particular scenarios have specific assumptions about the nature of time, rationality and agency. Believing that the future is like a roll of dice is quite different (you die when you die) from New Age approaches focused on intentionality “you are as old as you think”[10].

We now apply CLA to ageing. We develop six maps of CLA based on the six different images (images here functioning as foundational assumptions/worldviews) (see Table I).

The utility of CLA is that policy needs to be multifold, developed for different levels of reality – that is, for the litany – what is visible, for the systemic level, for the worldview and for the deeper story. This means that policy must be temporally sensitive, focused on immediate, short-term, long-term and very long-term perspectives and solutions. Dealing with the current litany is often a piecemeal political effort. Ensuring the system is more effective takes at least one electoral cycle, often two. Challenging dominant worldviews can take decades. Transforming the myth-metaphor is a multi-generational effort. As well, policy and research must be vertical based, having the capacity to move up and down levels.

Scenarios

Based on the CLA, we can now develop alternative futures. These are developed as scenarios (see Appendix, Tables AI–AIV for scenarios in table format). Each scenario has a different driver, and captures different dimensions of what may happen. These scenarios are of utility for strategic purposes (what should be done) and for educational purposes (to map the future) as well as for cautionary purposes (what should be avoided). The scenarios are developed through the following archetypal structure: best case, worst case, outlier, and business as usual (continued growth)[12].

The best case scenario is based on the “A society for all ages” vision. The Worst case has features from CLA 1 (dominant model) and CLA 5 (worst case) and is “A society divided by ages.” The outlier scenario is derived from CLA 2 (emerging technological model) and is “Virtual world”. The business as usual has features from CLA 4 (emerging societal model) and CLA 6 (easiest fit model) and is termed “Governmentalised”.

This preferred scenario, “A society for all ages”, is driven by strong and successful policy interventions. “A society

divided by ages” can come about if nothing is done, that is, current technological and social trends continue. “Virtual worlds” is the outlier scenario. It is unlikely unless developments in technology continue at their current pace. The “Governmentalised” scenario can come about if present modes of policy intervention and analysis continue, that is, failed interventions.

A society for all ages: smart and caring ageing

This is the preferred scenario as identified by the Queensland Department of Families. It is driven by the demographic group, “cultural creatives”[13]. They are individuals who prefer a future that is based on gender partnership, ecological sustainability, personal spirituality, and a caring interventionist state aligned along triple bottom-line values. They contrast to “traditionals” (focused on a strong nation-state and patriarchy) and “modernists” (focused on technology and materialism).

In this future, ageing is neither seen as a burden nor a foundational problem but rather as a resource for systemic and civilisational revitalisation. Thus, there is a high degree of acceptance of diversity (of all ages), creating a culture that moves past racism, sexism and nationalism.

This diversity is evidenced by architecture that is designed for multiple generations (and economic incentives for this). The nuclear family is strengthened by the extended family. Other family forms are accepted. The key is a strong community social fabric.

The aged are not marginalised nor are they necessarily seen as wise. Thus, both notions of the “glory” of youth and the “wisdom” of the aged are challenged. Government intervention uses technology to create a society of all ages. Smart houses, smart health and smart ageing become defining concepts. Smartness includes the use of genetic and artificial intelligence technologies along with softer technologies – exercise, meditation, social inclusion.

The context of this is a shift in the life cycle from traditional notions of student-work-retirement to a range of alternatives, including life long learning. Distinctions between life stages blur and where they remain, transitions occur outside of ageist paradigms.

Funding for ageing research is extensive and is balanced: technological funding, social funding (social innovation) and quality of life funding (incentives for evidence-based interventions such as exercise, meditation, etc.) are all championed.

The underlying worldview is communities in harmony. It is a move away from the modern approach to governance and ageing, and toward a transmodern approach.

The research style that emerges from this scenario is action learning based. The aged are not the object of research. Stakeholders themselves develop what it means to be young and old, to age, to retire. Empirical, interpretive and

Table I

CLA 1	<i>Dominant model</i>
Litany	Alone, sick and aged – powerless
Systemic	Change taxation regimes. Import labour. Enhance productivity. Reduce health costs, if possible
Worldview	Ageing as a collective burden
Myth-metaphor	Baby boomers are the problem. They have stolen from future generations[11]
CLA 2	<i>Emerging technological model</i>
Litany	We can win the war on ageing
Systemic	Funding for biotechnology companies. Funding for ageing research. State plus corporations plus universities
Worldview	Techno-utopian
Myth-metaphor	The fountain of youth – living forever
CLA 3	<i>Contesting model</i>
Litany	Productive, conscious and active ageing. Ageing can be the second youth – revitalisation
Systemic	Whole-of-government with professional associations and activist organisations, locally and globally. Use evidence-based information to develop proactive whole-of-life cycle policies. This includes social inclusion, low-fat diets, exercise and meditation/relaxation, for example
Worldview	Complexity. Indigenous cultures. Non-West (wise elders). Transmodern
Myth-metaphor	Healthy, wealthy and wise
CLA 4	<i>Emerging societal model</i>
Litany	Ageing is a problem
Systemic	Find political will. Establish office of ageing. Nominate commissions
Worldview	Bureaucratic
Myth-metaphor	Experts within government can solve the problem
CLA 5	<i>Worst case</i>
Litany	Intergenerational conflict – old people will not “go” and youth are “destroying the city”
Systemic	Gridlock as system cannot deal with crisis. Best jobs are held by aged. Few entry level jobs for youth
Worldview	Conflict – class based. Young versus old
Myth-metaphor	Every age for themselves
CLA 6	<i>Easy fit</i>
Litany	More old people but no major problems
Systemic	System can accommodate
Worldview	Short-termism
Myth-metaphor	Incrementalism always works

critical research traditions are combined. The approach is multigenerational (even contesting this term). The policy framework implications of this model are developed in the conclusion of this paper, but generally for this scenario to occur policy development must be at varied levels – the litany of ageing, the systemic, the worldview and the deeper stories. This must occur on an inner and outer level, and for the short and long term. Stories about ageing should be considered as important to biotechnology research as ageing and extended family ageing design. Care must be taken to not marginalise any group, thus research must be action learning based, wherein all parties participate in creating desired futures.

A society divided by ages: demographic challenges not met

The second scenario is based on inaction by government, allowing market and other drivers to continue unabated. It is the worst case scenario as class divisions ripen, indeed, age becomes a definer of access to power and wealth. Much of the futures literature is focused on this scenario Peter Peterson's *Gray Dawn* and Paul Wallace's *Agequake* are two examples of this.

The drivers are the demographic imperatives coupled with a business as usual approach in and to governance. The proponents of this scenario are those with a vested interest in the current system, wealthy retirees, senior government and corporate leaders, for example.

In this future, the divisions along class, age and gender heighten. Each class believes they are being discriminated against. Youth are upset by the disproportionate power of the aged (they tend not to leave positions of power, that is, the traditional generational rotation does not occur). Women find it even more difficult to break the glass ceiling. Economic power is equally class based. As youth age, they find they cannot afford homes. The home ownership dream dies (and given the inverse relationship between home ownership and poverty in later life, the future looks bleak for Australia's middle class) and the costs of public housing continue to increase. Youth become more radicalised.

The social fabric is under attack. The nuclear family continues to weaken, and no alternative structure emerges. Social isolation increases. Ageing for most becomes a terrible experience as they live longer in poorer care centres. Of course, many aged live well in retirement homes. The poor move toward misery, having little access to community. They

are depressed, eat poorly and have few social networks to fall back on.

Funding is for public housing, better retirement villages, however, gaps continue to widen. The costs of taking care of the aged become more difficult to meet. Youth rally against heavy taxation knowing full well that they will not be taken care of as they age.

It is a future of class conflict, the end of the Australian dream.

For Queensland Government, certainly the goal would be to avoid this future. This is possible through:

- ensuring that institutional changes – governance – keep up with life cycle changes, that is, business as usual cannot continue.
- dialogue between ages so that intergenerational conflict is avoided.
- a much higher immigrant intake, especially of youth.
- funding for families.
- funding of projects that help individuals make the transition between phases in their life cycle.
- changes in the superannuation and pension system.
- ensuring that the safety net for old and young is not destroyed as the worker to retiree ratio shifts from 4-1 to 2-1 either through increased productivity or life long learning and production.

Virtual worlds: strangers in the night

The main driver behind this scenario is rapid developments in genetic and artificial intelligence technologies. Two groups spearhead this future: digital natives (those born into the computing world) who see the Internet as natural and the aged who fear death and seek technological intervention to allow them to live much, much longer. Double-helix children (born in the decade 2010, when genetic engineering becomes natural) will further this scenario.

Risk management – in the form of presenting at birth one's life chances (based on genes) and adjusted for social, political and economic environment and diet/exercise as one ages – dominates. Indeed, the goal is to link quantitative and quality of life with probabilities – life quantified by risk management tools.

In the short run, there is higher productivity through the science and technology revolution. This reduces and eventually eliminates the need for foreign migrants. Even caring for the aged can be automated through personal robots. Medical technologies lead the way, from the current plastic surgery to the soon-to-be gene therapy. With nano-bots, surgery becomes far more precise, interactive and intelligent. Over time, age is technologically constructed, not only are we able to feel any age we want but we can be any age we want.

In the long run, the digital soul[14] is possible – brain uploading and soul downloading.

However, given that it is likely that technological changes will not go hand in hand with social and cultural changes, we are likely to see society divided along lines of access to technology. And as social inclusion is an indicator of health, endless technology may not be the “fountain of youth” as promised.

As the quest for a preventive and risk-free society continues, three types of social worlds are possible:

- (1) totally electronic communities, where reality is mediated through the Internet and its successors;
- (2) gated, intentional communities with anti-ageing regimes from the natural to the biological; and
- (3) aged middle-class are likely to move to poorer nations where the dollar can travel further (drugs and gene experimentation of a variety of types is likely to be cheaper there).

The problem of meaning will also come out as technocracy does everything. The post-industrial knowledge economy leads to few working – only 20-30 percent work.

Youth as a category is treasured, sought after but never understood as a life phase. It is museumised.

The operating worldview is techno-utopian[15], combining the fear of death with technological possibilities to reverse ageing. Research funding generally goes toward applied research.

The policy implications are based on the view that this future should be avoided or at least the social, cultural and spiritual dimensions developed so that it is more balanced. Given that the imperatives of science and the market will create this future before our very eyes it is crucial that social funding (for technology design that creates virtual and touch communities[16]) be championed. This means ensuring that public space is not lost – this means architectural space along with community spaces. These must be built into current technological developments. They cannot be an after thought. Doing so means a broad-based conversation on the new technologies, particularly germ line intervention and artificial intelligence. Connections within Australia are as important as connections with the outside world. The image of a rich, ageing Australia contrasted to a poor, young Asia is not too far off. The antidote is a policy framework that creates genetic, virtual and “real” agoras.

Governmentalised[17]: ageing bureaucracies and bureaucracies for the aged

This scenario is driven by bureaucratic politics. Essentially this is a future of failed policies and successful language. The aged are used as a tool for re-election. Fear of ageing and the crisis that ageing brings on is also used for political purposes (changing the retirement age, changing the pension scheme, for example).

An entire industry around caring, monitoring and evaluation of the aged (and the future of the aged) develops,

indeed ageing becomes the growth industry of the next 20 years and beyond.

Special interest groups develop around funding for the aged. The major political parties have strong divisions as to what should be done about ageing (market versus intervention).

While the nuclear family is heralded as the best for the nation, the social fabric weakens through the dependency created by continued government interventions. From birth to grave, government is expected to provide care. Given the crisis of ageing, power becomes centralised at higher levels.

Funding increases for departments of the aged. Funding for social programs to ameliorate the excesses of globalisation (as in the privatisation of health) increases in particular. There is also funding for women to have more children. High intake of migrants to Australia is encouraged but only the right type.

The worldview is that Father knows best, and Father is the state. The aged are the object of research. Research continues to be segmented between government and university.

Public policy on ageing will be incremental and goal oriented. There will be little flexibility. This future can be avoided by ensuring that:

- there is rotation of elite so that a particular party does not dominate the discourse;
- commissions on the aged have sunset laws so that they do not continue in perpetuity;
- the voice of youth remains potent by including them in policymaking;
- government does not dominate discourse by including and funding non-governmental organisations; and
- setting in place processes to transform government's vertical structures to more spherical learning organisation and learning community processes (see Figure 1).

Inner and outer

So far we have focused on external dimensions of ageing. However, borrowing from Ken Wilber[18], it is important to

note that there are internal dimensions as well[19]. These external and internal dimensions can be developed with the axis of individual and collective. Applied to ageing it reads as shown in Table II.

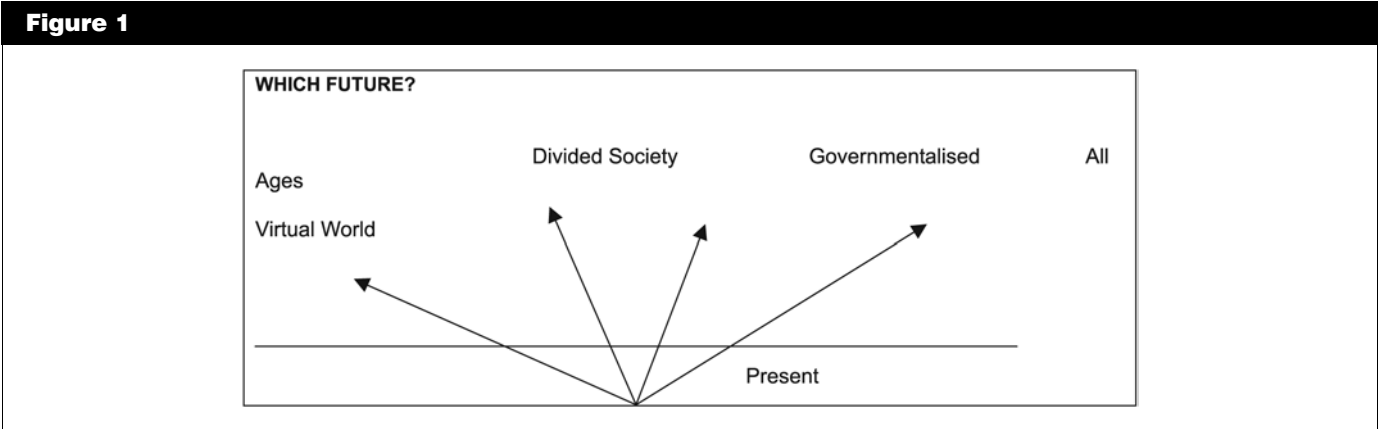
While current policy is focused on the outercollective level, there is a strong case to be made, if Wilber and others are correct that these two axis are foundational, that we need policy that if not guides, at least is informed by inner dimensions as well. This especially means developing new models for the inner collective dimensions of ageing.

We conclude this futures paper with a range of policy recommendations. These fit most directly to the “A society for all ages” scenario.

Policy recommendations

- (1) Conversation on ageing futures across stakeholders. Different worldviews need to be built into this conversation. That is, the assumption should be that the traditional Western model of the life cycle is not universal and that there are real alternatives every step of the way.
- (2) Implications of smart state vision on ageing futures, e.g. Smart ageing. This means using technology to prolong life spans as well as to design houses, communities and lifestyles that are ageing friendly.

Table II		
	Inner	Outer
Self	Feeling good about ageing Personal health Coming to terms with death How others see me ageing	Biological clock Chronological clock Social inclusion Diet Exercise
Collective	Inner map of life cycle (birth-work-retirement) Alternative maps from other times, cultures and futures as resources to rethink modernist map	Social policy Care for aged Intergenerational equity Retirement age Careers for aged City design and aged



- (3) Anticipatory action learning (asking questions of desired and probable futures through iterative cycles) as the main policy research methodology. Scenarios of ageing futures need to go beyond the academic to the media – television, Internet, focus groups. This means ensuring that the aged (and youth) are not the object of research but are part of a mutual dialogue on desired ageing futures.
- (4) Develop an inner dimension to ageing policy at the collective and individual levels. Essentially, this is about deep health. In terms of the smart state vision, this is about including wisdom in our definitions of intelligence and developing notions of collective intelligence.
- (5) Transforming bureaucracy to learning organisations to learning communities. Thus, far more important than forecasting demographic patterns, is developing organisations and communities that have the capacity to accommodate change. This is necessary to avoid governmentalisation.
- (6) Ensure that the preferred vision of the future 2020 “A society for all ages” has broad based support. This means community consulting with experts. Visions to succeed must:
 - enable;
 - ennoble;
 - have doable time horizons (20 years);
 - be participatory;
 - be based on evidence-based research;
 - have champions at all levels of society and organisation.

Conclusion

Ageing should be seen as a fundamental issue for the future of the planet. An ageing society challenges basic assumptions of modern culture and political economy. These challenges can be met as ways to transform the present and create different futures ageing can be seen as a resource. If not, then failed policies will lead to governmentalisation, lack of intervention will lead to a divided society, and a focus on simple technological interventions will lead to Virtual worlds. However, by acting now, there is a window of a decade to ensure that the future truly is a society of all ages.

Notes

- 1 For more on this term, see Sohail Inayatullah, *Understanding Sarkar*, Leiden, Brill, 2002. Microvita assumes that reality is both mind and matter. It is a non-sensate view of life.
- 2 www.scholars.nus.edu.sg/cpace/infotech/cook/memedef.html. See Richard Dawkins, *The Selfish Gene*, Oxford University Press, Oxford, 1989. The Oxford English Dictionary defines meme as: “an element of a culture that may be considered to be passed on by non-genetic means, esp. imitation”, also, see Susan Blackmore, “Imitation and the definition of a meme”, *Journal of Memetics – Evolutionary Models of Information Transmission*, 1998, No. 2.

- 3 For more on this, see www.who.org.
- 4 www.asaging.org. Robert C. Atchley, “Conscious aging: nurturing a new vision of longevity – but is it a hard sell”, www.asaging.org/at/at-231/Conscious.html. From Jennifer Bartlett and Sohail Inayatullah (Eds), “Future oriented policy planning: skills development program”, Brisbane City Council, Strategic Planning and Policy, March 2003.
- 5 Nancy Morrow-Howell, James Hinterlong and Michael Sherraden, *Productive Aging: Concepts and Challenges*, Johns Hopkins University Press, Baltimore, MD, 2001.
- 6 For more on these methods, see, www.metafuture.org. Also, see special issue of *Futures*, “Layered methodologies”, Guest editor, Sohail Inayatullah, Vol. 34 No. 6, August 2002.
- 7 For the best examination of this, see M. Zappacosta, “The future of the European Societal Bill”, Special Issue of *Futures*, Vol. 35 No. 2003.
- 8 The Club of Rome’s *Limits to Growth* and other studies is a modern example of this.
- 9 Of course, those who development of the litany required great not only analytic capability but as well as the capacity to touch the system, the worldview and myth/metaphor level. A litany is not a litany unless it has something to rest on. For example, the litany of economism rests on the world financial system which rests on the worldview of capitalism which rests on the myth of greed, the invisible hand, and self-interest.
- 10 Of course, the other variation in popular culture is that “you are as old as the person you are feeling”.
- 11 For an alternative reading of this, see Frank Shaw, “Is the ageing population the problem it is made out to be?”, *Foresight*, Vol. 4 No. 3, 2002, pp. 4-11.
- 12 For more on scenario development, see Sohail Inayatullah, *Questioning the future: Futures Studies, Action Learning and Organizational Transformation*, Tamsui, Taiwan, Tamkang University Press, 2002. Other models can be used as well. These include the single and double driver method (e.g. technological advances on the x-axis and government policy on the y-axis, creating four scenarios: 1. High-tech with strong government intervention (smart aging?), 2. High-tech with weak government intervention, letting current forces define aging policy (Rich age well, others age with low quality and quantity of life). 3. Low-tech with strong government intervention (quality of life and equity is central for all ages). 4. Low tech with weak government intervention (citizens move elsewhere for aging cure, market forces define generations, superannuation falls apart).
- 13 See, www.culturalcreatives.org. Paul Ray and Sherry Anderson, *The Cultural Creatives*, Three Rivers Press, New York, NY, 2000.
- 14 See Thomas Georges, *Digital Soul: Intelligence Machines and Human Values*, Westview Press, Boulder, CO, 2003.
- 15 For more on this future, see work in progress at www.futurefoundation.org. As well, see Ray Kurzweil, *The Age of Spiritual Machines*, Penguin, New York, NY, 1999. Michio Kaku, *Visions: How Science Will Revolutionize the 21st Century and Beyond*, Oxford Publishing, Oxford, 1998. Also, see www.metafuture.org
- 16 For more on city design, life cycles and aging, see Philip Daffara, *City Futures and Aging*. Forthcoming *Journal of Futures Studies*,

- paper presented at the Brisbane City Council Course on Futures Oriented Policy, 18 March 2003.
- 17 For more on this, see the various works of Michel Foucault. In particular, see, Michael Shapiro, *Reading the Postmodern Polity*, University of Minnesota Press, Minneapolis, MI, 1992.
 - 18 Ken Wilber, *Integral Psychology*, Shambala, Boston, MA, 2002. Also see Richard Slaughter, "Knowledge creation, futures methodologies and the integral agenda", *Foresight*, Vol. 3 No. 5, 2001, pp. 407-418. Slaughter transforms Wilber's thinking into a futures method.
 - 19 For works focused on the inner, see Deepak Chopra. For example, see Chopra, *Grow Younger and Live Longer*, Rider, London, 2001.
 - 20 In Queensland, Australia the proportion of those over 60 years will increase from 15 percent in 1995 to 23 percent in 2031. Already 25 percent of those over 65 demonstrate functional psychiatric disorders. From: To a Queensland Disability Policy and Strategy, DFFCC discussion paper 1997, p. 12 quoted in Ivana Milojevic, *Home and Community Care Services: Generic or Discriminatory*. HACC Action Research Project, report to Catholic Social Response, 1999, p. 35.

Appendix. Scenarios in table format

Table AI — A society for all ages: smart and caring ageing	
Drivers	Values based – creating the good society
Leading proponents	Cultural creatives
Description	Ageing as future capital – as a resource for systemic and civilisational revitalisation High degree of acceptance of diversity creating a culture of inclusion, moving past racism, sexism, nationalism Shift from reified "glory" of youth and "wisdom" of aged Shift from traditional model of student-work-retirement-death Architecture designed for multiple generations. Aged friendly Smart houses, smart health, smart ageing Care giving valued, culturally and economically Strong social fabric. Nuclear family strengthened by extended family. Other family forms accepted High immigrant intake from nations with youth populations Governance structures changed to accommodate needs of youth Government intervention succeeds
Funding	Funding for ageing research, balancing technological funding, social funding (social innovation) and quality of life funding (incentives for evidence-based interventions such as exercise, meditation, etc.)
Worldview	Intergenerational equity and communities in harmony Post-Western
Research implications	Action learning wherein categories of social and economic research are created by stakeholders. Integrating empirical, interpretive and critical research traditions
Policy implications	Broadening, deepening and extending out in time the policy framework. Anticipatory action learning

Table All — A society divided by ages: demographic challenges not met	
Drivers	Demographic imperatives and business as usual
Leading proponents	Elite – wealthy retirees and senior government leader
Description	Divisions along class, age and gender Youth upset at disproportionate power of aged Old have political power as well as financial power Youth cannot buy into Australian home ownership dream Leaders as they age become even more conservative (against change) while youth become more radicalised Families exhibit these generational tensions Social fabric under attack. Nuclear family weakened with no alternative available Within the aged, there are two groups. Wealthy and the poor. The poor are also unhealthy, eating poorly and generally depressed[20]
Funding	Social welfare funding and funding for better retirement villages. Imbalanced tax structures favouring old
Worldview	Class conflict
Research implications	Empirical research. Search for objective truth. Aged define the research agenda
Policy implications	Avoid this future by: 1. Dialogue between ages. 2. Anticipatory action learning research. 3. Funding of projects that each movement through the lifecycle. 4. Ensure that institutional change keeps up with demographic shifts. 5. Ensure that future vision is broad based and flexible

Table AIII — Virtual worlds: strangers in the night

Drivers	Technology and anomie
Leading proponents	Digital natives and aged afraid of death and decrepitude
Description	<p>At birth, life chances are presented. How one dies, how one suffers. Likely trajectory is presented</p> <p>Medical changes – nano-bots, brain surgery, search for ageing change, plastic surgery and gene therapy</p> <p>Brain uploading and soul downloading</p> <p>Create the “age?” you desire</p> <p>Designer children – weak social fabric – nuclear family one of many family associations</p> <p>Higher productivity through biological revolution</p> <p>A preventive and risk-free society</p> <p>Individuals live to 120-140, and much longer</p> <p>As they age, they enter virtual worlds. These are of different types. Type 1 is totally electronic (but real). Type 2 is gated communities complete with anti-ageing regimes from meditation to plastic surgery. Type 3 are in cheaper nations for poorer aged</p> <p>Knowledge economy leads to few working. Technocracy does the work. 20 percent work</p> <p>Youth are treasured and envied. Generally, they are “museumised”, theme “parkised”</p>
Funding	Dramatic funding for research that combines genetics and artificial intelligence
Worldview	Techno-utopian
Research implications	Applied research
Policy implications	Avoid this future by: 1. Ensuring that material technology develops with social innovation. 2. That society is seen as layered, as constituted by technology and socio-cultural meaning systems. 3. Ensure technological design develops in communal ways so that techno-isolation does not occur. 4. Broad based debate on nature of new technologies particularly germ line intervention and artificial intelligence. 5. Design of agoras in physical space and time

Table AIV — Governmentalised: ageing bureaucracies and bureaucracies for the aged

Drivers	Politics
Leading proponents	Bureaucracies
Description	<p>Special programs to monitor and evaluate the aged. Special interest groups develop around funding for the aged</p> <p>Policies fail but language for electoral purposes succeed</p> <p>Nuclear family heralded as best for nation. Social fabric weakened through interventions</p> <p>Strong division between political parties on what should be done about ageing – market mechanism or intervention – however both will intervene</p> <p>Strong state with reduced power to local regions</p>
Funding	Funding for departments of ageing. Funding for social programs to ameliorate the excesses of globalisation (privatisation of health). Funding for women to have children. Only “right” type of migrants attracted to Australia
Worldview	Governmentality
Research implications	Aged as object of research. Research segmented between government, university and institutions
Policy implications	Policy will be incremental, fixed and goal oriented. There will be little flexibility. This future can be avoided by: 1. Ensuring rotation of elite such that government does not dominate discourse but voices of aged, of community associations, of youth remain potent. 2. Vision of the future and a range of alternative futures remains as important as plans and strategies. 3. Commissions have sun set laws so they do not continue into perpetuity

A framework for intergenerational planning

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Abstract *Terms such as “intergenerational planning”, “intergenerational redistribution”, “intergenerational equity” and “intergenerational accounting” have all gained currency in recent years. This paper reviews recent debates about how to assess the extent and nature of future need, outlines some scenarios, and describes some of the principles that have been adopted for intergenerational planning. The paper goes on to set out some principles to guide government investment (including equity, research, and methods of allocating resources). Finally, the paper suggests some of the elements for a community intergenerational planning framework.*

The late fourteenth century was a disastrous time for Europe. Successive waves of the Black Death – the bubonic plague – wiped out between a third and a half of the population, across all the generations. In northern Germany, freehold farmers abandoned the tradition of leaving the family farm to the oldest son, and instead made the youngest son the successor. This had a number of effects. First, it ensured that the parents had tenure of their home and livelihood for the longest possible time. Second,

the landholding was not divided among the children into small, unviable farmlets that could not sustain them. It also presented older brothers with a forced choice: either they stayed and worked for their younger sibling as cottagers with no property of their own; or they could seize the opportunity to leave the farm and join the wider economy in the towns by learning a trade or engaging in business.

These events simply illustrate the reality that the search for intergenerational solutions to inevitable changes in population and social demography is not at all new, though the scale and structure of modern government gives it new dimensions.

In the Australian context, Binks (1989) documents the peculiar history of our generational structure. In 1881, people over 65 formed only 2.4 percent of the New South Wales population. Before enactment of the federal Invalid and Old Age Pension Act in 1908, age had no formal financial significance. One's status depended on seniority and role in the family. There were no government initiatives for any but the absolutely destitute, and intergenerational interactions were of necessity strong and happened through family structures. In today's Australia, Binks, and more recently the Australian Institute of Family Studies, suggest that intergenerational exchanges are common, and most families are close even if the three generations do not physically live together. Importantly, it appears that parents continue until well after retirement to provide substantial financial and in-

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kind support to their children and grandchildren. Early thinking about intergenerational programming in Australia grew out of concerns that there are vulnerable families who are without strong intergenerational ties: single parent families, highly mobile young nuclear families, and newly arrived migrant or refugee families.

Current literature does not offer any ready-made planning frameworks that focus on intergenerational plans with a whole-of-population perspective. In this paper, we shall review the recent debates about how to assess the extent and nature of future need, outline the scenarios some writers have foreseen, describe some of the principles people have adopted for intergenerational planning, and set out some principles to guide government investment (including equity, research, and methods of allocating resources). Then we shall suggest some of the elements of a whole of community intergenerational planning framework.

Debate about the extent and nature of future need

The welfare reform agenda of the present Australian Government is built on principles of self-reliance, mutual obligation, incentives, and affordability. The Prime Minister described it in 2000 as “a modern conservative approach to social policy that supports bedrock social institutions such as the family and promotes enduring values such as personal responsibility, a fair go and the promotion of individual potential” (Howard, 2000).

The terms “intergenerational planning”, “inter-generational redistribution”, “intergenerational equity” and “intergenerational accounting” have all gained currency in recent years to bolster positions about a range of issues, but no consensus has yet emerged on these issues.

In the USA, Kaplan and others (2002) say:

In many developing and post-industrialized nations, there are powerful demographic and social changes that are endangering the natural ways that old and young have traditionally interacted. The current growth in the youth and elderly populations of most countries is leading to new challenges in terms of providing health care, education, financial support, and social support systems for the young as well as the elderly.

In Australia, Baum *et al.* (1999, pp. 7-8) have described recent social and economic changes, and changes in the welfare state and public policy. They quote Reich's description of changes in labour markets – an occupational structure with well-paid jobs at one extreme and lower paid, less stable jobs at the other. They cite Mingione's list of “major transitions” in demographic structures:

the ageing of the population; the weakening of kinship networks; declining stability of the marriage contract and an associated increase in single parent families; and an increase in migrant groups who may be discriminated against and who may be less able to be integrated into existing networks of communities.

They describe changes in welfare and public policy as a “fundamental reconfiguration of social policy” that involves the:

devaluation of the public sector and the crisis in the welfare state, in particular, its ability to provide a safety net for individuals and families” (p. 9). In short, they say:

We have seen the ability of the family and community to act as social buffers weakened because we have an increasingly larger number of individuals who are socially isolated for longer periods of time, and there are an increasing number of individuals caught in households and communities that lack the resources needed to cope with day-to-day living. Herein lies the prospect of more and more vulnerable individuals and possibly vulnerable communities (Baum *et al.*, 1999, p. 8).

According to Keating, the dire resulting scenario looks like this:

There has been a net transfer toward older individuals from younger families who are more likely to have young children. Demographic and labor market changes have placed substantial strains on such families, making the organization of stable, high quality child care a challenge. The mobility of families has also increased, so that extended family supports are less readily available. Community coherence appears to be declining, reducing the chances that communities will take up the slack when families are having difficulty. Increased income inequality raises the specter of steeper socioeconomic gradients. . . . These well known trends undermine our ability to build supportive contexts for human development (Keating, 1999, pp. 238-9).

This scenario calls for a concentration of resources on the very young as a way of ensuring a good start, less vulnerability in early life, adolescence and young adulthood, and therefore more successful and healthy ageing, with the implication of less human and economic cost to society at every stage of the lifespan. However, the evidence is mixed. The findings that emerge from retrospective cross-sectional studies produce one set of outlooks, while results from prospective longitudinal studies produce a quite different picture.

For example, Hertzman (1999, p. 34) offers this scenario:

Status differences at birth are associated with different levels of stability and security in early childhood, which are in turn associated with different levels of readiness for schooling. Lack of school readiness leads to an increased risk of behavioral problems in school and ultimate school failure. Behavioral problems and failure in school lead to low levels of mental well being in early adulthood. Meanwhile, the status of one's parents helps to determine the community where one grows up, which, by the early school years, starts to influence the child's life chances through the social networks, community values and opportunities that present themselves.

By early adulthood, individuals start to define their own status. Already, differences begin to emerge wherein those who are doing better report higher levels of well being. As adulthood unfolds, lower status individuals tend to end up in jobs that make relatively high demands on them but which offer low levels of control of the pace and character of work. . . . By the fifth decade of life, those stuck in such jobs first develop high rates of disability and absenteeism, and then they begin to die prematurely and from the full range of major causes of death. This general pattern . . . persists into the eighth decade of life.

When you patch together the cross-sectional studies that have sampled different life stages, it seems to be clear that making life easier for one generation at the beginning and middle of the lifespan will mean a healthier, more able elderly population. But rigorous longitudinal studies, while not arguing against investment in the young and policies that support young people and their families, demonstrate that assumptions that simply shifting investment from one part of the population to another in the expectation that later there are payoffs for everyone, may not be too simplistic.

In contrast to the pictures of pathways inescapably laid down in childhood and early adulthood, Vaillant (2002, p. 94) describes the findings of the 70-year-long Harvard study of adult development and healthy ageing in quite different terms. "In actual fact", he says, "although we all 'know' that childhood affects the well being of adults, recent scientific reviews reveal that such explanations are rather less important than we thought".

Only recently have studies of normal development survived the three or more decades needed in order to follow well studied children into maturity, let alone old age. Such prospective study has demolished many cherished assumptions. For, in retrospect, adult outcomes can always be explained. In psychological biography, hindsight permits all the pieces to fall obediently into place. By choosing illustrative single case histories, I can prove any point I wish. ... For example, when the childhoods of the best and worst aging outcomes in the Harvard Study were compared, there were few differences. When identified in advance, rather than retrospectively, fingernail biting, early toilet training, even that old standby the rejecting mother, failed to predict either emotional illness or bad aging. ... At 18 infant/childhood problems of some kind (for example, phobias, and marked shyness) were recollected by the parents of virtually all men who as adults became mentally ill. However, these same problems were also recollected by 60 percent of the parents of men who remained healthy. Orphans, by the time they were 80, were as likely to be happy and in the pink of health as those whose parents lovingly watched them graduate from high school.

In cross sectional studies, one of the most powerful correlates of successful aging is income, but among the three Study samples, emotional riches seemed far more important. ...

"Perhaps the best summary of the data", Vaillant says, "is that 'what goes right in childhood predicts the future far better than what goes wrong'".

In Australia, the arguments have reached a new pitch following the Treasurer's release of Budget Paper No. 5 – The Intergenerational Report 2002-2003 (Treasurer, CoA, 2002)[1]. The budget paper claims to identify "emerging issues associated with an ageing population". It is an example of government use of projections of the generational structure of the population to make consequent projections of expenditure.

These forecasts are based on anticipated problems that may require a human service system response, and evoke policy arguments about who will have to pay, how much, at what level of government; and about individual responsibility for saving for old age or for catastrophe at a younger age; or simply how much basic health, education and welfare

services will cost, and how they will be paid for as both the availability and the nature of work changes. At the federal level, predictions about looming imbalances are already used as the basis for changes in welfare and policies for funding the states and territories.

There are conflicting arguments about using demographic, social and economic projections as the basis for significant shifts in economic, welfare and health policies and resource allocation within and across the generations.

Kinnear of the Australian Institute (2001) outlines the assumptions of the budget paper:

- older people are a social and economic burden;
- population ageing will result in a serious dependency ratio imbalance; and
- there is a close correspondence between the size of the aged population and increased public expenditure.

She says these assumptions are largely invalid. She points out that only "3.5 percent of Australians over 65 require public assistance for daily living"; that older people "make significant contributions of time and money to their families"; that "dependency ratios" erroneously equate dependency with age; and that "because youth dependency is declining, total dependency ratios by 2051 will be approximately the same as they were in the 1970s". She believes that to promote the benefits that accrue in societies that have equitable access for all citizens will facilitate the transition to an older society.

More recently (2003), she has gone further, and describes the Budget Paper as another sleight of hand. It claims to be about ageing. It is about the blow out in health costs. A closer look reveals, however, it identifies only a blow out in pharmaceutical costs. ... Moreover, the Intergenerational Report itself reiterates the views that moderate and respected commentators have been arguing for a long time – ageing contributes in only a small way to rising health costs.

Earlier, in the *Australian Economic Review*, Ablett (1998), examined Australia's intergenerational redistribution of resources through taxation and welfare policies. He concluded that:

in Australia, the generational accounting simulations provide no evidence of an overwhelming generational imbalance in current fiscal policy. This would imply that population ageing will not pose insurmountable problems for the Australian welfare state, provided public health care and other social expenditures do not grow significantly faster than the economy as a whole.

Tapper (2002) of Edith Cowan University says that the Intergenerational Report is about fiscal sustainability, not about intergenerational equity. The budget paper claims:

sustainability and fairness are threatened by a projected trend in Commonwealth spending, which – beginning in about 15 years' time – will outgrow revenue income, if present policy settings and demographic projections hold steady. ... the increased spending will be mainly on health and aged care and on age pensions. Who is responsible for all this expenditure? The baby boomers – those born between 1945 and 1965. The argument is how to find a way to get

the baby boomers to bear the fair share of the costs so that Generation X does not have to bear them.

Tapper says, however, that the concept of intergenerational equity has been overlooked.

The Intergenerational Report nowhere analyses public policies in cohort terms, and therefore misses the existence of inequities right now. The welfare state has never attempted to measure intergenerational equity, yet it assumes the existence of a sustainable contract between the generations, each sharing its share of burdens in return for a bundle of social benefits. In fact, lifetime balance sheets can be tentatively constructed for successive cohorts.

Attempts to do so, he says, can muster plausible arguments and evidence to suggest that the baby boomers have in fact paid more than their fair share, are now looking after the inter-war generation who didn't, and who were heavily subsidised and encouraged to produce the boomers. The boomers' parents and their parenting were heavily subsidised, but now the boomers are looking after children who stay dependent much longer, and elderly parents who did not pay or plan for their retirement and frailty. That is, right now a smaller inter-war generation is imposing its costs on the much larger baby boomer successors. Tapper says that "by taking much more than its fair share, it has set its two successor generations against each other, and both have reasonable case to plead".

He concludes that Australia has always favoured a lean and mean approach to the welfare state. This frugality has – quite unintentionally – minimised the risk of intergenerational catastrophe. That word might seem exaggerated, but it is not. Australia's problems are serious. The problems of the larger welfare states, he says, especially the European states, are catastrophic.

At the international level, a number of communities of interest have arisen with a commitment to intergenerational planning. There is a growing number of efforts to establish communities of interest aimed at promoting intergenerational programs and thinking, notably the Center for Intergenerational Learning at Temple University (Temple University, 2003), the International Consortium for Intergenerational Programmes (ICIP, 2002), and Generations United in Canada (Generation United, 2001). Conferences and newsletters are devoted to it, such as the ICIP Newsletter and annual International Intergenerational Conference (its conference last year was called "Connecting generations a global perspective"). Generations United asks such questions as:

Are people of all ages being viewed as a resource? Does the policy promote the interdependence of the generations? Is the policy sensitive to intergenerational family structures (e.g. grandparents who are raising grandchildren)? Does the policy encourage intergenerational transfers through shared care or services?

There are applied projects to try, for example, to overcome age segregation in long-term care facilities (Bressler, 2001). These efforts are mainly about re-engaging older people with young people for mutual and societal benefit.

In Australia, too, this commitment can be seen in the Reshaping Australian Institutions Project at ANU, where Bettina Cass and others are developing frameworks for analysis of economic and family/social policy that draw on what they call "three intersecting concepts of justice: intergenerational equity, gender equity, and social equity" (Cass, 1994). The Australian Institute of Family Studies has an active research program to look at the nature of intergenerational support for the elderly (e.g. Edgar, 1995; Millward, 1994; de Vaus, 1995). The Australian Youth Policy and Action Coalition has discussed the impact of current policy on young people's access to income and employment support (Croce, 1995). A number of Australian researchers have examined intergenerational attitudes and prejudices (Thomas, 1998). For some years there have also been attempts at intergenerational programming (Moran, 1999; Binks, 1989; Wolcott, 1992).

In our view, the weight of evidence, though it is limited and incomplete, suggests that the present trend in policy, planning and programming that segments the society and argues for one part over another is shortsighted. It will contribute to a decrease in social cohesion and capital, which in turn will increase the costs the public purse will have to bear as familial and community-based connections between the generations loosen or disintegrate.

Planning for future resource allocation

Many of the papers developed to look at the ageing of the population are analyses of demographic trends, percentage or absolute number increases in the number of people aged x to y, the living circumstances of those people, single people living alone, couples living together, and so on. The other key basis of planning for the future is patterns of demand for services in the past, on the assumption that if such and such a number of people aged between x and y used this much of services a, b and c, and we now have 200,000 more people who are aged between x and y, then we will need substantially more of services a, b and c.

It is very hard to know what this means without reference to understanding the expectations, hopes, aspirations and capacities behind those numbers.

Whatever the merits of the various arguments and interpretations of evidence, this way of planning for the future is based on planning for problems, and costing the familiar ways of addressing them – not planning for what people want, and alternative ways of providing for people who may need society's support. Predicting the future has less value than attempting to create it.

Coombs is quoted (in Croce, 1995) as having said:

It is necessary to make access to a healthy, stimulating and dignified lifestyle for all citizens the prime objective of economic policy.

In line with this sentiment, we argue that rather than planning based on detailed analysis of inputs (how many people, of what age, in what type of family structures, and so on), we

should be planning backwards from the outcomes we wish to see. The set of outcomes we suggest is this:

- a society that makes sure there is inter- and intra-generational equity;
- a society that tries to develop labour markets and social supports that help families look after each other across the lifespan;
- a society that fosters contact and exchange of skills between generations;
- a cohesive society where policies and programs promote the level of interdependence that is inevitable, given the nature of the species across the lifespan; and
- a society that can cope with those whose needs for support are exceptional, as well as making best use of those whose independence and capacity are exceptional.

Once we settle on the key high-level outcomes we want to pursue, we then need to be clear about how the resources needed to achieve those outcomes will be applied. Planning frameworks inevitably issue in decisions about how resources are to be allocated across the wide spectrum of the needs and expectations of society. Most commentators on resource allocation in the human services emphasise the need to make the basis of resource allocation fair and equitable.

The defining attributes of equity, according to Almond (2001), are: equal opportunity to access services; a high standard of service for everyone; and unequal distribution of services to meet unequal need. She speaks of vertical and horizontal equity. Vertical equity, she says, “indicates that people with unequal need ought to be treated in a dissimilar way, that is, differential treatment of unequals is required”, whereas horizontal equity “means that people with equal need be treated equally”.

Some researchers (e.g. Bindman *et al.*, 2000; Sheldon, 2000) argue that inequity occurs not only in allocating resources, but also in how the resources are used. Describes four elements of fairness in decision making and priority setting:

- (1) “rationales for priority setting decisions must be publicly accessible”.
- (2) “These rationales must be considered by fair-minded people to be relevant to priority setting in that context”.
- (3) “There must be an avenue for appealing these decisions and their rationales”.
- (4) “There must be some means, either voluntary or regulatory, of ensuring that the first three conditions are met”.

In short, decisions should be transparent, open to debate, and based on the principles of fairness and equity, and allocation of resources should be based on need.

At the broad public policy level, Keating (1999, pp. 237-50) drew up a set of principles that should guide government

investment in the health and well being of future generations. We suggest a slightly modified version that reflects the premise that intergenerational planning will promote the best outcomes for all citizens at all stages of the lifespan:

- Healthy human development across the lifespan and economic growth are fundamentally interdependent in producing the innovation that is the major predictor of sustainable economic prosperity in the information age.
- Investment in the core infrastructure of a society includes investing in both economic development and human development. Investment in human development across the whole lifespan is a benefit not only to the individual, but to the society and its economic prosperity.
- Government concentration is therefore called for on both economic and social policies, supported by the best available evidence about the determinants of health and well being at all points in the lifespan.
- In order to be sustainable, investment must make best use of available and potential resources through networks that cross traditional bureaucratic, professional, industry and government boundaries, and apply these resources to specific social problems.
- Health, competence, and coping skills reduce the prospect of exploitation, by increasing both opportunities for and awareness of choice. Supports for safe development of people across the lifespan are a basic human right, and a key to an individual's productive engagement in society and its economy.
- Investment in human development must be targeted on the basis of the best available evidence on core dynamics in human development across the lifespan.
- All efforts to ameliorate social harms must be accompanied by investment in research and development. All investments must be monitored and evaluated for both intended positive outcomes and the possibility of unintended negative outcomes. These outcomes include monitoring for intergenerational, gender and social equity.
- In monitoring investment, governments must also ensure that policy making across portfolios takes full account of health and well being, and is well informed by research and the best expertise available.

We strongly support the development and adoption of a set of principles and values of this sort that will guide planning and subsequent resource allocation. They will influence interpretation of so called hard data and qualitative data at each step. Being unclear or silent on principles and values has the strong potential to distort planning processes and outcomes in a way that multiplies over time – often to the extent that it is very difficult to evaluate constructively what is useful and what is not when anticipated scenarios and their planned human service solutions are not working.

In response to the projected structural changes in population, the current approach to planning seems to be:

“What are the problems going to be, for whom, and how do we pay for them?”. But what if we were to take a different approach?

We suggest that, by asking another set of questions, incrementally we may get things less wrong, and create less social division between generations, and actually increase social cohesion and transfer of skill from one generation to the next.

We need to be clear about what are the questions that need to be answered, and who has the right and the capacity to say in relation to each question. Some questions will be answerable only by experts; others are answerable only by the people in the skin who will be the subject of policy and program development that may flow from long range planning.

We need to make sure the questions posed and the outcomes sought are whole of population focussed. Focus on one target group or another without reference to the interdependent nature of the society and the generations is a major flaw that leads to less cohesion and less social and financial capital to spread around.

If we work backwards from the outcomes we want to achieve for the society, not just a particular target group, the elements of a planning framework will be quite broad.

Potential elements of an intergenerational planning framework

Assessment of the extent and nature of future need in light of chosen outcomes needs to be guided by more than projected numbers of people, projected household structures, and patterns of current expenditure on service delivery, but also by careful research about the expectations and behavioural intentions of people who will be affected by the outcomes of planning and resource allocation.

Be clear and explicitly describe the limits of the data that is available to answer the key questions. For every assertion made at each step of the planning process there should be an honest statement of the extent of guesswork and conjecture. Too many plans are made on the basis of unfounded assertions that then become the very shaky foundation for serious policy and program development and resource allocation. If you do not have the capacity to answer crucial questions, then you may need to commission additional research.

Planning for community engagement and consultation to ensure planning is clearly focussed: Make sure you are planning for something that is actually likely to be real. Check not only the quantitative evidence presented for one scenario or another, but also check the interpretation of that scenario with the people who are part of it. Their expectations, hopes and aspirations will determine actual rather than hypothesised demand for human services, and the shape and cost of them. Also, are there any ideological or political assumptions or assertions driving a particular interpretation

or the range of solutions proposed? It is important not to identify the wrong problems and spend years solving them precisely.

Once you are clear that you are planning for something that is likely to happen, and you know from the people who are being planned for what principles and values they believe should guide program development and resource allocation, and you know what their hopes, expectations and behavioural intentions are, then build information systems that will allow you to track over time the accuracy of your projections and the stability of people's expectations and behavioural intentions, alongside the impact of predicted and unpredicted outcomes, both positive and negative, of changes in the economy, technology and science.

Planning for industry/provider development: What are the new organisational forms and the new ways of working together across government, non-government and private sectors?

Develop the partnerships that will be necessary to implement the plan, and engage them in the planning process from the beginning. It is clear that, given the broad range of social determinants of health and well being, planning must be integrated across levels of government and across government, non-government and private sectors. True and effective partnerships will deeply challenge traditional power relationships as to who sets and develops policy and how it is done. If the planned-for scenarios require significant behaviour change in the population and the workforce, managing change to a desired outcome requires that those who will be most affected by it are involved and engaged. How much innovation has been stalled or blocked by vested interests in the professions or the bureaucracy?

Planning for workforce development: Workforce development planning has been largely about how many we need of what we have already (professions, disciplines, categories of workers), where and how we get them, and how we keep them there. For the future, much broader questions need to be addressed. To achieve the outcomes we want the human services to deliver, we need planning that addresses these questions:

- What training and education – at school, undergraduate, postgraduate, professional development and on the job mentoring and support – do we need to deliver services in new ways and non-traditional places?
- What recruitment and retention strategies do the human services need to ensure all the sectors attract and retain staff and don't compete with each other unproductively for the existing workforce?
- What level of regulation of the workforce is needed to ensure that inter-professional turf wars are reduced, and recognise those with informal life experience-based skills – and where appropriate the role of traditional healers – in meeting the broad range of social supports

and semi-skilled assistance needed by the ageing population and people with a disability.

- What are the special workforce needs of rural and remote and under-served areas?
- What organisational policies and practices will support the workforce once employed?
- What strategies will attract back into the workforce those who have left owing to burnout, or inappropriate or culturally insensitive organisational practice?
- How should we change industrial relations processes and management practices to allow the flexibility in human service delivery that will be required by people who want to age in place?
- How can we achieve integrated whole of sector (government and non-government) workforce strategies across the full range of human services?

Structural changes in the population and changed community expectations of human services must mean structural changes in the nature of the workforce, the power relationships among and between professions, and between them and the consumers of human services.

Planning for change management: The need to plan how innovation in the human services can be disseminated – not just draw up a plan and expect things to follow spontaneously.

Planning that includes built-in mechanisms that monitor and evaluate against a core set of reliable indicators at population and program levels: So far, human services have become good at process evaluations, but not good at paying for or conducting sustained monitoring and evaluation of outcomes. We need to do more than what government usually does, which is monitor the way things are being done and the assets that have been added. Current practice in review and evaluation is the necessary but not sufficient step in knowing if we are getting return on investment in human services.

We need to be alert to external changes that shift the balance of what needs to be done. For example, new drugs and new technologies that can affect mobility and the capacity for self care can make some organisations or ways of delivering services redundant in short spaces of time.

We must consider how our traditional ways of working with the aged, with youth, and so on, can have unintended negative consequences at all ages. Usually these consequences disproportionately affect those with the least resources. Recently, for example, past failure to keep human service infrastructure up to date and commensurate with need has meant that older people – often grandparents – have had to take on the burden of looking after the children of their disturbed children at a time when they may have expected to retire.

Planning for sustainable whole of sector initiatives: Traditionally, planning has been done by one segment for the whole, or for only one government program or policy

initiative. While there are increasing efforts in government to do whole-of-government work, at present it may still involve as few as two departments working together. There are also increasing examples of how new investment, made to reshape a service system, is leached away into “more of the same”, as constrained resource or unaddressed problems in the traditional human service sector (acute, intervention, and remedial rather than early intervention and prevention) take priority and distract from new purposes.

Planning for and managing relationships across sectors: Relationships among the government, non-government, private for profit, and private not for profit sectors in the human services are critical in the interests of the community, providers and consumers.

Set timeframes for reviewing plans commensurate with what we know about how long things take to change or for change to be measurable or discernible with a degree of acceptable certainty. Be clear that we are in the process of getting planning less wrong over time rather than all right all at once.

Note

- 1 Provides a basis for considering the Commonwealth's fiscal outlook over the long term, and identifying emerging issues associated with an ageing population.

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An ageing perspective

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Abstract *The consequences of population ageing for Australia are increasingly debated at a national and state level. Ageing issues on the policy agenda now reflect the need to take a broader societal approach. However, the evidence to inform policy is still lacking in a number of areas. In particular, more needs to be understood about ageing from the community perspective, including evidence on values and attitudes across the generations and the expectations and needs of older age groups. This paper explores the evidence on community perspectives and attitudes on ageing and the extent to which it has informed policy and program development. Using illustrations from Queensland, key policy challenges presented by some of the broader emerging issues will be highlighted, along with possible strategies for policy development in the future.*

Introduction

The issues associated with population ageing in Australia are numerous and diverse, moving beyond the questions of aged care that have dominated the policy agenda in recent years. The broader perspectives have been highlighted recently in a number of national reports, strategies and discussion papers including the *National Strategy for an Ageing Australia* (Commonwealth of Australia, 2001), The Intergenerational Report (Commonwealth of Australia, 2002) and a report on promoting healthy ageing in Australia (Prime Minister's Science, Engineering and Innovation Council, 2003). At the state level too, strategic initiatives such as Queensland's A Society for All Ages: 2020 are being developed to address

ageing issues within a wider societal context. This builds on the progress made with the state's framework on ageing (Department of Families, Youth and Community Care, 1999). The importance of evidence to inform the development of sound policy directions is recognised in these national and state reports. However, because research on ageing has not been a priority for funding, the level of knowledge to inform decisions and debate about the future is inadequate. Geriatric medicine is the largest contributor to ageing research in Australia (Commonwealth Department of Health and Aged Care, 2000), but reviews and scoping studies confirm the need for much more research into the biological, health and social aspects of ageing (Le Couteur *et al.*, 2002; Kendig *et al.*, 2000). In particular, more needs to be understood about ageing from the community perspective, including evidence on values and attitudes across the generations and the expectations and needs of older age groups. This paper sets out to explore the evidence on community perspectives and attitudes on ageing and the extent to which it has informed policy and program development. Key policy challenges presented by some of the broader emerging issues will be highlighted, along with possible policy strategies for the future. A number of examples from Queensland will be used as illustration.

Community perceptions

The exploration of ageing issues from the wider community perspective has received little attention until recently. While the published research is limited, some insight into current issues is provided through consultation with older people's and professional organisations and associations. The perceptions of the Australian community have been sought in shaping various recent strategies for ageing at the national and state level. In the *National Strategy for an Ageing Australia* (Commonwealth of Australia, 2001) a framework for

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addressing population ageing sets out goals in five key areas: workforce; retirement incomes; attitudes, lifestyles and community support; healthy ageing; and world class care.

In response to an inquiry on long-term strategies to address the ageing of Australia in the next 40 years, the House of Representatives Standing Committee on Ageing^[1] has received submissions from individuals and organisations. Many of these submissions were made by groups, associations and organisations representing older people's interests including: the Older Women's Network, National Seniors' Association, University of the Third Age, Carers Australia, Adult Learning Inc. and Alzheimer's Australia. An analysis of the submissions reveals a spectrum of issues that are consistent with those raised in the *National Strategy for an Ageing Australia*. They include health and aged care, housing, retirement income, education and transport. Underlying concerns are conveyed about economic hardship and scarcity of services for older people. This concurs with the findings of the Myer Report (Myer Foundation, 2002) which points to gaps in the current range of services in all sectors, including rehabilitation, hospital assessment services and high-level residential care and community care.

Other submissions to the Federal Inquiry highlight issues of age discrimination in employment and the workplace, segregation from the community, lack of recognition for older people's skills and community contribution, and exclusion or limited access to some services. The negative attitudes surrounding older people were frequently raised as an issue and the losses associated with bereavement and dependency.

While the majority of submissions focus on the problematic aspects of ageing and aged care, a number highlight the positives that can be achieved, including the potential for fostering intergenerational communication schemes involving older people visiting children in hospital, and children (with adult supervision) visiting isolated older people. Encouraging the role of grandparents within the family, and the role of older volunteers within the community were suggestions to increase participation of older people.

The issues are numerous and there is a need for further debate about what can reasonably be expected by the community and for policy to build on these expectations. Fundamental questions about "who pays?" cannot be avoided. Ultimately, the emphasis on individual responsibility is likely to increase and the challenge for government is to achieve a balance between promoting community and individual responsibility and state provision.

Values and attitudes across the generations

The goal of a "society for all ages" cannot be reached without understanding the influence of attitudes and values across the generations, including the attitudes and values of

older people, baby boomers and people from culturally and linguistically diverse (CALD) backgrounds. It is also important to understand how attitudes might be influenced or change over time. The challenges are considerable because, as noted above, current representations of age and ageing in society are largely still negative ones. While government strategies and policies acknowledge the need to break down stereotypes and promote more realistic images of ageing, some of the root causes have to be understood before they can be tackled.

Negative attitudes towards older people are known to be held by most children and young adults. A study of adolescents found that grandparents were identified as positive role models, yet their "usefulness" was perceived more in terms of active public contributions than in their wisdom and knowledge (Thomas and Hallebone, 1995). If ageism is to be addressed, the attitudes and knowledge of children and adolescents need to be more positively constructed so that they do not hold stereotypic views of ageing. While there have been some attempts to influence attitudes through various initiatives, these have not always met with success. For example, an intervention education program for students aged 17-18 years was found not to be effective in changing the level of knowledge or their attitudes (Scott *et al.*, 1998). While negative attitudes toward older people can be reversed with information, a study of college students nevertheless found that the new attitude might be lost without reinforcement for change (Ragan and Bowen, 2001). A partnership model to develop an action-based curriculum for teacher training that challenges the dominant discourse of non-productive old age may be a more successful route to change attitudes (Seedsman *et al.*, 2002). Direct contact provided by intergenerational learning projects may also be valuable. Seedsman *et al.* (2002) analysed 85 intergenerational learning project initiatives across Australia and identified a number of positive outcomes. They were effective in building social cohesion of local communities and enhancing local cultural life and identity. In addition, such schemes provided opportunities for diverse groups of people to engage in health and community advancing activities.

Negative stereotypes about ageing are not confined to young people. According to a study of Australian attitudes, over two-thirds of those surveyed believed that older people are viewed with less respect than they deserve (Worthington Di Marzio, 1999). Even amongst health professionals, negative views about older people persist. Australian nurses have been found to devalue and underestimate the capabilities of older people, and other research suggests that these perceptions may be common across other health professions (Gething *et al.*, 2002).

It is increasingly apparent that the post-war baby boomers are likely to deconstruct many of the negative stereotypes as they enter old age. There is much speculation

about the particular characteristics baby boomers will bring to old age. Compared with previous generations of older people it is speculated that they will be more likely to live in low density outer suburbs, and to live alone; be more ethnically heterogeneous; have fewer children, living at greater distance away; rely more on private superannuation; have higher levels of education; be more travelled; more selfish; be more socioeconomically polarised; have greater gender equity; and be more health conscious (Hugo and Thomas, 2002).

While the research is still limited, some insight is provided into baby boomers' attitudes by a New South Wales study into retirement (Heartbeat Trends, 2001). The study revealed that retirement plans for this group may be vague and people worry that their savings may not last. Those in work feel pressured to stay on top of their jobs but there is a preference for winding down, rather than complete retirement. Becoming older releases people from certain restraints and new careers are believed possible. Travel and maintaining lifestyle is important and the choice of activities and lifestyles available result in less free time. However, an important finding from another recent study suggests that the retirement income of baby boomers will not support their expected lifestyle (Kelly, 2003).

Contrary to recent trends towards early retirement, specifically amongst men, a national survey of 5000 Australians aged 45-69 and no longer in work found that a majority of men aged under 65 and women under 60 would still prefer to be working (Commonwealth Department of Family and Community Services, 2000). Labour force participation among those aged 55-64 is only 51.3 percent and attitudes towards older workers are still very negative (Steinberg *et al.*, 1996a). There are persisting stereotypes that older workers are more costly, less productive, less willing or able to learn new skills and stay with the same employer for shorter periods of time. Age discrimination is still widespread in recruitment, particularly towards women (Gringart and Helmes, 2001). Such attitudes will need to be addressed if the workforce participation rates of those aged 55 and over are to be raised, the trend towards early retirement diminished and the chances of re-entering the workforce increased.

Understanding the experiences of later life amongst people of CALD backgrounds is a vitally important area of research given the diverse cultural makeup of Australia's population. Health needs and preferences are little understood. The experiences of later life among people of CALD backgrounds have been explored by Barnett (2001). In a study of over 300 people born between 1925 and 1955 and living in rural, regional and metropolitan locations, it was found that older adults desired an aged care system which is built on a partnership between formal aged care providers and family and friends. The vision for ageing was overwhelmingly positive, with older people having a strong

and continued contribution to the lives of their family, friends and community. In the absence of ill health, there is an expectation of increased freedom and independence. However, against cultural expectations, it has also been noted that children of older migrants to Australia are reluctant to give up their full-time jobs and provide care. Neither is the option of residential care an appealing one (Thomas, 1999). More research about the needs, attitudes and expectations of those from CALD backgrounds is still clearly indicated.

There has been limited research into the current older cohort's attitudes and values, particularly in relation to health and aged care. When asked about care preferences, a majority of older people in Australia preferred home delivered services, while 28 percent preferred residential care, only 5 percent wanted family care and no one wanted to go to hospital for long-term care (McCallum, 2002). Nevertheless, research has found that older people prefer to die in hospital (Steinberg *et al.*, 1996b). While most older people living in their own homes and needing care receive it from a family member, the support required to remain at home is not always available. The Australian Women's Longitudinal Study revealed that older widows living at home have needs for practical help and assistance such as home maintenance and legal assistance, as well as support, understanding and information from GPs (Feldman *et al.*, 2002). Furthermore, Government policies that rely heavily on the family to provide support and care for older people may be inappropriate in the future. While research has found that many adult children have responsibilities and obligations for their parents, this "is by no means universal, unequivocal or without qualification" (de Vaus, 1996).

Progress and challenges for policy

The research on societal attitudes and community perspectives has made an important contribution to broadening the ageing policy agenda in Australia. The issues span health, housing, income, aged care, transport, work and retirement. National and State Government policy activity in these areas has increased markedly, but the process of change is slower in some areas than others. A major challenge for policy development is to address the diverse needs of older Australians. It is crucial to recognise that older Australians are not an homogenous group but a diverse range of individuals. With increased life expectancy, it is clearly inappropriate to expect that an age group spanning potentially 30 years or more should be regarded as having all the same characteristics, needs and demands. Indeed, the baby boomers are already demonstrating how different they are likely to be from each other and previous generations. Nevertheless, even in a recent government report (Prime Minister's Science, Engineering and Innovation Council, 2003), three generations of ageing people (45-64, 65-79, 80 and over) are identified to address their different needs, expectations and priorities.

The following discussion considers the progress made in addressing some of the broader ageing issues raised earlier in this paper under the headings of healthy ageing, workforce, lifestyles and diversity.

Healthy ageing

A vision for an additional ten years of healthy and productive life expectancy by 2050 is set out in *Promoting Healthy Ageing in Australia* (Prime Minister's Science, Engineering and Innovation Council, 2003). The recommendations focus on physical activity, nutrition, work and social environment, and the built environment. The importance of increasing physical activity with ageing is highlighted in recent research (Bauman and Smith, 2000) and is a major focus of the report given the trend towards sedentary behaviour and the well established link with many health conditions including Type 2 diabetes, heart disease, musculoskeletal disorders, some cancers, high blood pressure, high blood cholesterol and atherosclerosis. The implications are far-reaching, with an estimated 2.5 million Australians over the age of 65 being sedentary by the year 2025 (Australian Institute of Health and Welfare, 2001a).

A number of state and local community initiatives have been developed over recent years to promote healthy and active ageing. In Queensland, for example, this has included an *Active Ageing Strategy* (Department of Tourism, Sport and Racing, 1999) and initiatives such as the "60 and Better" program funded by Queensland Health, the Heart Foundation "Just Walk It" program, Brisbane City Council's Growing Older Living Dangerously (GOLD) program, and many others. As evaluations of local programs are not always undertaken or published, the impact of these programs on take-up and adherence is not clearly demonstrated. This highlights the importance of building in evaluations at the start of health promotion programs for older people, as previously identified by Nutbeam (1999). A major challenge for the future is to find successful strategies for engaging and sustaining the interest of individuals and communities in physical activity and also to understand more about positive benefits of physical activity on social support. A more extensive research agenda is required to further inform developments in this area.

Diverse population needs

Aboriginal and Torres Strait Islanders (ATSI) life expectancy is around 20 years less than the average non-indigenous Australian and the issue is therefore that few ATSI people reach older age (Edwards and Madden, 2001). Recent policy activity has tended to overlook ageing issues within this group, such as the reasons for failing to reach old age, or the social and health issues affecting older Aboriginal people. While research and evaluation is lacking, there are some initiatives to make programs more inclusive and accessible to all. For example, the HACC good practice project on community care in remote indigenous communities in

various states, including Queensland, indicates that community ownership, service design and mode of delivery are central to success (Kobold, 2002). The HACC program in Queensland is also working in partnership with indigenous providers (Burton, 2002). These studies indicate an increased need for health care services, support and residential care for the indigenous population, delivered in a manner that overcomes service and societal obstacles. However, much still remains to be done by both Commonwealth and State Governments, who have a continuing role and responsibility to work with Aboriginal communities in identifying their specific needs, facilitating partnerships and projects, and ensuring that community services are accessible and inclusive.

By 2026 it is predicted that one in every four people over the age of 80 in Australia will be from a culturally and linguistically diverse background and will be concentrated in cities (Australian Institute of Health and Welfare, 2001b). The English proficiency of some groups of ethnic aged remains poor and home ownership is also low in the same groups. Currently, small ethnic communities needing care for older members experience disadvantages in accessing formal care and support (Barnett *et al.*, 1996). While ethno-specific services are in demand, because of the small size of many ethnic groups and their dispersal, this type of provision may not provide a long-term solution (Williams *et al.*, 1999). Clustering of housing and services may provide a more flexible and viable alternative (Rowland, 1999; Benham and Gibson, 2000), but further investigation is needed, including the piloting and evaluation of potential models.

Retirement income

The rise in poverty among older Australians is illustrated by the fact that more than 50 percent of people coming on to the age pension do so from another income support payment (Commonwealth Department of Family and Community Services, 2002). Changing workforce patterns and societal changes such as the incidence of family breakdown and community fragmentation will impact on people's capacity to save for retirement, on formal and informal support arrangements for the retired and on living standards in retirement. Of particular concern is the poor financial position of older women and their risk of having lower living standards in retirement due to broken periods of work, or years out of work because of caring responsibilities (Rosenman and Warburton, 1997). A Queensland study of women and financial planning revealed that women had little time or insufficient knowledge to consider longer-term issues and concluded that few would be able to fully self-fund their retirement years (Noad, 2000). While there is some progress with community education and awareness raising of the need for retirement income planning, fundamental questions about the need to boost retirement savings, while maintaining the adequacy of the aged pension, still remain.

Lifestyles

Significant changes in family structure raise a number of potential consequences for older people, including the risk of social isolation. As couple families without children will be the major family type by 2011, a lack of traditional support networks may lead to increasing risks of social isolation, including neglect of the long-term care needs of older people. Those living in rural Australia are particularly disadvantaged in accessing health care. Australian studies have found that around 10 percent of older people are socially isolated and a further 12 percent are at risk of social isolation (Edelbrock *et al.*, 2001; Gardner *et al.*, 1998). Many of the factors contributing to social isolation, such as loss, poor physical health, mental illness, being a carer, geographic location and transport difficulties, are hard for individuals to address and designing effective interventions to address the problem is difficult (Findlay and Cartwright, 2002; Findlay, 2003). The Queensland Government is responding by setting up a cross-government project, including Commonwealth partners, to identify and disseminate information about leading practice models in the reduction of social isolation of older people. This will include community consultation and demonstration projects. Other related projects have included suicide awareness raising programs and support groups for older men, responding to the fact that in 1996 rates of suicide by men aged 75 years and over were higher than any other age group in Queensland. The programs have been positively evaluated, highlighting the need for continued effort in this area (Cartwright *et al.*, 2002).

The housing and living arrangements of older Australians also raise a number of concerns for the future. For those who can afford to pay, moving to private retirement villages is an increasing trend, although there are emerging questions about the impact of such segregation of older people from the community as a whole. The 12 percent of older people aged 65 and over who live in public housing or rent privately are particularly vulnerable as they have a low income, no other assets, and are also vulnerable to social isolation due to insecure housing. Difficulties in obtaining and maintaining short-term and independent accommodation, and inadequate assistance with employment and training, also place older people's living standards at risk. The threat of homelessness is a growing reality for many older Australians (Judd *et al.*, 2003). During the past two years, the proportion of older clients receiving the Supported Accommodation Assistance Program (SAAP) in Queensland has been increasing (Commonwealth Department of Family and Community Services, 2003). This program funds services for people who are homeless or at risk of being homeless. Brisbane is second behind South East Sydney as the area with the highest percentage of older clients accessing SAAP services (8 percent). Older men are more likely to be homeless and older indigenous people are over-represented

among older SAAP clients. Many homeless people have a disability, alcohol dependency or mental illness. They also have difficulty accessing mainstream aged care, and services are sometimes culturally inappropriate.

Lifelong learning to enable older adults to maximise their contribution to society and promote mental engagement has received greater prominence in recent years. However, there are still a number of specific barriers. Information technology has been identified as a particular issue by older people. Some of the significant barriers to its use (e.g. insufficient education and support) could be alleviated through community education programs. Several other key issues, such as cost, access, equipment design and jargon, would need to be addressed in order to ensure that more older people gain confidence and access to this technology. However, Government and organisations need to ensure that dissemination of information and services is not reliant on electronic delivery if marginalisation or social isolation of older people is to be avoided (Steinberg and Walley, 1998).

Strategies for policy development

This paper has provided an overview of some key issues arising from the ageing of Australia's population within a changing context of community values and attitudes. It highlights the importance of grounding policy for an ageing Australia in social reality if it is to work well. This means that the values and principles underpinning policy should be explicit and realistic, and their implications fully understood. The perspectives and issues explored in this paper suggest that a number of key approaches will need to be adopted by government in the future.

Community participation in policy making

The involvement of older people and the wider community is vital to inform policy making on ageing. As the baby boomer generation will be more likely than previous generations to participate in policy decisions, Government will need to create genuine opportunities for this to occur. *The National Service Framework for Older People in the UK* (Department of Health, 2001) offers one model in which older people are used as champions to represent views and influence policy, practice and research. This model recognises the wisdom that older people can contribute to society. The capacity of even very disadvantaged older citizens, living in a variety of settings, to express their views effectively has been demonstrated by Russell and Kendig (1999). While the Queensland Government has consulted with older people in its policy development, there is scope for more extensive and ongoing participation (Bartlett and Findlay, 2003). Vehicles need to be identified that will engage the community throughout the policy development process.

Partnership development

While intergovernmental cooperation and coordination are vital in the development of *A Society for All Ages: 2020*, other

partnerships will also be important. There is great potential for government to be involved in new partnerships with the corporate and business sectors, as well as local government and non-government agencies. It is recognised that traditional models are no longer appropriate and new models are needed in aged care, work, retirement and leisure. Greater flexibility in service provision of all types will be required to meet the diverse needs of future cohorts of older people. Many new initiatives exist across the community, but more opportunities and mechanisms are needed to share good practice about partnerships that can inform policy.

Community capacity building

Programs that engage older people in community capacity building may help promote integration and improve attitudes. Promoting “age-friendly” community environments is increasingly acknowledged as an important means of achieving an inclusive society for older people. There has been a proliferation of projects using these concepts in a variety of areas including transport, Web sites, hospitals and financial planning services (Worrall, 2002). Recognising and valuing the role of older volunteers will be integral to challenging negative images of people in later life, as will widespread intergenerational activities. Communities that can foster an environment that supports the provision of informal support to older residents will need to be created.

Changing attitudes and capacity building through education

A framework for education and training is needed to drive progress at all levels. Extensive community, school and workplace education and training interventions are needed across many sectors to improve attitudes towards older people and also to increase older Australian’s knowledge and skills. Programs need to focus on employer attitude change towards older workers; training skills for older workers; enhanced lifelong learning opportunities; using information technology through community and Internet learning options; and consumer education on superannuation and retirement savings.

Capacity building in the workforce should be a major focus, requiring a fundamental attitudinal shift towards working with older people. Education pathways are also needed to prepare career opportunities for working with older people. New ways to develop a trained workforce to meet the diverse care needs of an ageing population will need to be found. Retraining programs for mature aged unemployed people will be important avenues to address current staff shortages. Continuing efforts are required to increase understanding and knowledge through staff education and training.

An intergenerational and lifespan approach

Because of the interconnectedness of many ageing issues, a lifespan approach will be necessary to address them.

Policies therefore cannot be confined to the older age group, but must also apply to other areas and stages of the life cycle, such as child care, education, employment, labour market structure, superannuation, home ownership, public housing, public health, health services and transport (Benham and Gibson, 2000). Older age policies will of course continue to be necessary to address such issues as aged care services, public pensions and informal carer support.

The Government also has a role in facilitating and supporting meaningful intergenerational initiatives involving reciprocal exchange. Some innovative intergenerational programs exist, but they are still relatively new and untested in Australia.

Conclusion

An inclusive strategy for older Australians challenges policy makers to draw on the available evidence and also initiate research and evaluation into new and emerging areas. Researchers, government, voluntary and private sectors have identified a wide range of research gaps in ageing and several questions urgently need to be addressed to inform policy making in this area. The activities of the Commonwealth Government’s Building Ageing Research Capacity initiative include a framework of ageing research priorities to guide activity (Commonwealth Department of Health and Ageing, 2003). Six strategic ageing research themes have been identified to focus activity: ageing workforce, retirement income, positive images of ageing and social participation, age-friendly infrastructure and built environment, healthy ageing, and high quality health and aged care. This provides a vehicle for researching some of the neglected issues identified above including understanding the needs and expectations of baby boomers, early retirement, poverty and ageing, housing needs and homelessness, older overseas-born Australians, indigenous ageing issues, informal volunteering roles of older people and ageing in rural Australia.

A strategy for 2020 will need to challenge many of the existing structures and forge new definitions of age and retirement that acknowledge not only the demographic trends, but address changing attitudes, values and quality of life.

Note

- 1 www.dph.gov.au/house/committee/ageing/strategies/subs.htm

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Youth voices: young Queenslanders' values in a time of structural ageing

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Abstract A key aspect of the debate on structural ageing is the views of young people. This article, commissioned as one of the stimulus papers for the Queensland Government, tackles issues pertaining to community images and perceptions of youth, as embedded in popular media and psyche.

Queenslanders, at the opening of the twenty-first century, are experiencing an intensification of societal forces that are challenging long cherished beliefs about social order and governance. The old security of a heavily mediated society and economy nestled in the arms of a highly interventionist state has given way to open economic processes that require markedly different responses from individuals, their communities and their governments.

Increased stress and social insecurity have accompanied these changes. The growth of jobless households, particularly those with children, falling birthrates accompanied by increased life expectancies, changing family structures, the emergence of youth suicide as a societal issue, and consistent changes in the workplace, all

underpin this growing sense of insecurity and flux (Sercombe *et al.*, 2002).

Charting these forces reveals deep rifts between a set of values (mateship, a fair go, the welfare state, land as resource, the bush and the Aussie soul (Tacey, 1995, pp. 40-41), etc.) that have been perceived as defining Australian and Queensland character and a set of emergent values (justice, sustainability, participation and efficiency,) that seek to push our understanding of society and economy in global and holistic directions (Dawkins and Kelly, 2003).

Setting the scene

Young Queenslanders are living with these tensions and, if the interviewees who provide the substance and scope of this paper are at all representative of their age cohort (13-27), they are energetically engaging with the possibilities and problems that concern both their age and the time in which they live.

The framing of policy that is to be responsive to these tensions and sensitive to the issues of immediate concern to young people requires government to understand the nature of post-industrial society and the resultant complexity that characterises this time of transition. Youth researchers Dwyer and Wyn (2001) observe:

Young people in Western societies have been disrupted by change. They are having to cope with degrees of uncertainty that in many ways constitute a new kind of experience.

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The root of this “uncertainty” has generated an enormous range of intellectual debate and social commentary (Mills, 2001). Though analyses and opinions vary widely there is general consensus when it comes to the identification of the defining forces that will impact on Queensland and its young people over the coming decades (Carson *et al.*, 2000, p. 12ff).

- **Globalisation:** As both capital and information technology leap borders, the role of the state is moving towards a social enterprise following business principles with the citizen as share holder and beneficiary. As a result governments are being forced to rethink their purpose and *modus operandi* and individuals are faced with shifts in identity and agency.
- **Technology:** Following huge leaps in capacity, humanity is faced with the danger of technological developments outstripping the human wisdom needed to guide application. Ethical issues relating to genetic technologies, artificial intelligence and the environment are part of mainstream popular debate.
- **Environment:** Both public and private spaces are reinventing relationships with the environment. This is taking two forms as the natural environment is coming under ever more stress and as social space is found to be degraded to an extent that is leaving ever more groups marginalised and at risk.
- **Economics:** A re-evaluation of capital in the face of social dislocation has broadened the arena of economic activity to incorporate global forces and new evaluations of human and natural resources. Government has shed the machinery of the welfare state and is rethinking the social good in the light of free-market economics.

These forces are driving debate and constitute a depth and range of complexity that demands new approaches to governance and human activity.

Young Queenslanders and the future

As is to be expected, young Queenslanders' responses to these issues offer a complex range of perspectives that are reflective of their social and educational backgrounds. They feel the world has changed and feel it to be more problematic than it was for earlier generations.

Interestingly the majority of respondents in this study were quite pragmatic about the future and not overly concerned about ageing as a societal issue. There were more pressing issues for them such as work, environment and global security. Many acknowledged experiencing stress and uncertainty but felt this was to be expected, as their futures were unclear and choice brings with it both excitement and stress. Futures research is plentiful in this regard, Hicks (2002, Chapter 6) and Boulding (1994) have both argued that there are a common set of values and visions young people are carrying, albeit unclearly, into the future. Hutchinson (1996) and Gidley (2002, pp.155-69) concur and

have found that gender, education and economic factors impact on the young's ability to contemplate the future and their part in it.

There is an undeniable need for critical and creative thinking about the future. The “imagined future is a subversive force” (Coleman and O'Sullivan, 1990 quoted in Hicks, 2002, p. 130). Young people are already engaged in this as they are still looking in that direction. In contemplating the year 2020 one young man noted:

The best we can hope for is a world without war and poverty, with good education. Along with these three aspects there would be a flow on to the environment as well.

Community perceptions

Queensland society has an ambiguous relationship with its young. Attitudes are shaped in response to economic, political and social priorities. The media plays a significant role in developing and maintaining perceptions of “youth” and “youthfulness”. These attitudes can disguise questions of class and ethnicity, as populist rhetoric shapes social responses to young people and their life choices[1].

There are three stereotypes of “youth” that pervade popular culture and work to maintain an uncritical distance when it comes to debate and the generation of effective policy.

- (1) **Idealisation:** A significant amount of air and print space is given over to the extolling of “young achievers”. This tends to be a romantic interpretation of youthfulness as a time of possibility and is typified by heroic deeds and an adventurous approach to life. It affirms excellence and the family, privileges beauty and promotes socially validated activity such as industry, planning, and diligence[2]. Such a view is family friendly, building on hopes that link with images of success and strong self esteem; it alienates many young people who cannot meet these expectations; yet it also supports the status quo as it masks inequalities that affect education and employment (Dwyer and Wyn, 2001, p. 59ff), furthermore its values are unproblematic and foster a sense of cultural homogeneity along with popular notions of performance and justice.
- (2) **Othering:** Youth as a subculture or set of subcultures is also a popular stereotype promoted by media and commercial interests (Wyn and White, 1997, p. 77ff). It builds on some features of idealised youth but includes the gritty, the defiant and the dissolute[3]. This stereotype generates niche markets for clothing, soft drink, alcohol and substance abuse along with other goods and services. It is based, unlike the idealised image of youth, on the ephemeral and the transient. Youthfulness is described as a time of self-obsession and hedonism; it is wilful and unruly, politically out of touch and socially safe as the values and aspirations of this group are sealed within a generational vacuum that does not contest the values of the dominant social order.

- (3) *Vilification*: The image of young people engaged in anti-social activity, violent outbursts, unreasonable behaviour, crime and drug abuse is a favourite of the press as it generates strong feelings of moral outrage and antagonism[4]. Manipulated by politicians playing the law-and-order ticket it generates alienation and fear, and thus is an extreme form of “othering”. The underlying climate of fear and distrust generated by this stereotype typifies the response of those vested interests that seek to maintain hegemonic control over the centre by demonising marginalised elements of society. These images act as gate keepers as they create an artificial sense of homogeneity and sustain values consistent with a status quo under siege but still powerful enough to distract by focusing attention on expressions of social unrest rather than on the core issues underpinning that unrest.

Young people interviewed acknowledged how these stereotypes affected them and questioned the validity of such images while challenging the right of government to generate policy based on them. The “Anti-hooning Law” was given as an example of unjust legislation based on the need to over-regulate young people seen as a “menace” and “anti-social”.

Scope of interviews

A wide range of voices was sought to provide a representative sample of youth from Queensland. Opinions were solicited from 36 young people aged 13-27. While white Australians constituted 63 percent of the sample they themselves come from a variety of socio economic backgrounds (street kids, sole parent low income, middle class, privileged), ages and areas (country, coast, city). Young people from Aboriginal, Torres Straight Islander and non-Anglo-Saxon immigrant backgrounds were also consulted. The tables that comprise Appendix 1 describe the make up of the focus groups.

Information was gathered through interview and focus group meetings. Discussion time was allowed and the frames of reference of the project were also outlined. Participants were presented with four possible scenarios for Queensland society in 2020 (see Appendix 2) and asked to explore them in the light of their own personal values and hopes for the future.

Questioning focused on the following – young people’s:

- experiences with government;
- attitudes to media portrayals of “youth”;
- relationships with older generations;
- thoughts on their own ageing;
- sense of belonging, social engagement and identity; and
- hopes and fears for the future elicited as responses to four scenarios for Queensland 2020 (Appendix 2).

Most young people were happy to contribute to the process and expressed their approval for consultative methods being used to frame policy issues. Two invitees voiced their contempt for the process and declined to come. Higher levels of cynicism were evident amongst older people and were clearly articulated by the few who had completed higher education. Language was found to be problematic as not all participants could articulate their responses to their own satisfaction. Ethnicity and education were identified as barriers to participation in social discourse with the powerful.

Youth perspectives

The focus groups covered a lot of ground with young people expressing concerns, hopes and opinions on a wide range of issues relevant to policy formulation. These categories have been common concerns of young people over the past decades and can be seen as issues that weigh on the young as they contemplate their “inheritance” – the whole bundle of social, environmental and economic forces – and the responsibilities that go with it. Eight categories emerged from an analysis of their responses and will be used to form the organising framework for this section.

Dialogue: search for a voice in policy

Young people felt they had little power to affect policy directions. They saw their age cohort as under utilised and disenfranchised, expressing “anger at politicians”. They recognised that experience was important but felt that power was in the hands of a narrow aged section of the community. A number of respondents expressed their concern over “the problem of silent majorities and noisy minorities”.

There was general consensus on the fact that government (local, state and federal) had a poor track record in communication. It was generally acknowledged that there were some good and engaging projects run by government for young people that were underutilised because many young people did not know they were there. Visible Ink and the Youth Advocacy Project were both mentioned as projects that had their approval but were poorly promoted.

Many pointed at the education system as an under utilised channel for communication. All felt that they had learnt little about how to access government while at school. They recognised that they lacked language skills as older people communicated in a very different way to their generation. There was a vast gap between the language of power and influence and the language of the young. Aboriginal, Torres Straight Islander and Polynesian youth felt this very strongly, but many marginalised young non-indigenous Australians also experienced it. Schools were also seen as ideal venues for government to “sell” itself.

Many respondents expressed the desire to work with older people. “Youth would like to hear from older people/ elders for advice.” They also felt they needed positive access to government and that “maybe government doesn’t value

youth because they haven't seen what we can do yet?" The media was frequently criticised as negative about young people and for promoting stereotypes that disempowered, lowered self-esteem and created a false sense of division within society. Dialogue was not possible while such community perceptions created a sense of fear and distrust.

Many were concerned that their children would be having similar conversations with government representatives in 2020. There was general consensus that the government was big on talk and poor on outcomes. Older participants were more scathing in this regard.

Security/economics

Many young people expressed concern about their future security. They were worried about the possibility of war and also felt that their economic futures were unclear. They felt that jobs had been more stable and easier to get in the past and that they were vulnerable to economic exploitation. One young graduate asserted, "I will not have a child unless I know I will be supported as a mother." Some had held two jobs but found that taxation made this financially unrewarding. They also felt that young people took the brunt of heavy taxation on small business while some were concerned about how superannuation worked and felt unsure as to whether it was going to serve them well in the future.

There was recognition that despite difficulties faced by young people in Queensland "it's paradise compared to other countries". All desired access to work with some stipulating that the work needed to be emotionally as well as financially rewarding. Work for the dole came in for slight criticism but generally people wanted it to generate skills not demean the young. No one suggested throwing it out.

Valid employment and social activity was also seen as important in keeping young Aboriginal youth out of jail and also in reducing substance abuse amongst white kids.

Globalisation concerned some young people who wanted to "Keep Australia in Australia." Some also suggested that jobs were more important than technological change. A number of respondents did volunteer work which was undervalued but which provided skills and boosted self-esteem.

Environment

There was considerable concern over the extent of environmental degradation in Queensland. Some felt that "Capitalism, the environment and youth were intertwined"[5]. Many were engaging with environmental issues in their own lives. Some ate organic foods and some would have if pricing were not so excessive. Two came from a permaculture village while eight were vegetarian. All enjoyed eating at a range of take-away food outlets while few saw little conflict of interest between this and their stated positions on the environment and health.

Many felt that government policy could utilise young people's concern for the environment in positive ways. All agreed that "Work for the dole should be work for the environment." It was also felt that young people had to "pick up the tab" for the environmental irresponsibility of earlier generations.

There was also considerable romantic yearning for natural balance and a future in which "trees aren't in museums". Some saw technology playing a big role in the restoration of environmental balance and felt government should invest considerable energy into developing policy that promoted this. Many felt that the government was not honest about the crisis on the environment and that they should take more responsibility. They saw themselves as an important under utilised resource in government environmental planning.

Education

Many respondents felt that their educational experiences had not prepared them for the issues they faced as they transitioned into adulthood. Schools were seen as an under utilised resource in preparing young people for social activity. They were also described as highly effective, but once again underutilised, means for dissemination of information relevant for young people's engagement with culture and the environment.

Schools were seen as inflexible and too focused on academic curriculum that suited a narrow group of students and was focused on preparation for jobs that might not be there in the future. One respondent talked about a "life science" class designed to foster personal capacities that empowered young people to engage in dialogue with government and older sections of the community. Others contested this view stating that family and community should take on this responsibility.

Schools and universities were also seen as possible sites for intergenerational partnerships. Schools needed to promote student capacity by focusing on personal excellence and passion rather than academic goals. Intergenerational partnerships here were seen as effective learning tools.

Indigenous issues

Some respondents referred to Aboriginal, Torres Strait Island, Papua New Guinea and Samoan cultures with their emphasis on the relationship between young and elders in family and community as models for community building. It was felt that "For youth identity (both indigenous and non-indigenous) it is important to learn about Aboriginal culture." This was seen as an educational and social responsibility.

The media was seen as complicit here as society was portrayed as fractured with little cross-over between generational interests and expression. The media was also seen as levelling society in such a way that created a false

egalitarianism in which young and old were equals and respect was no longer required in any interaction between the two age cohorts. There was also a “sense of shame about Aboriginal history” that drew attention away from possible dialogue and modelling of partnerships between young people and their elders

Identity

Issues of personal identity preoccupied the majority of young people consulted. Many felt betrayed by their elders and stated “In the long run I don’t want to be like you.” Positive relationships with older people were seen as important in building personal identity but they were also hard to find and maintain due to the stratified culture of Queensland society. A shared language of experience was felt to be lacking. Older people had experienced a more stable period in history and failed to recognise this. Young people feel that “Our generation tries harder.”

Many wanted to “make a difference” but felt that they need to be offered real choices. They saw that many choices in our society were in fact illusory. The rhetoric of competition made it appear that there were jobs out there but that in fact there was a small window of opportunity through which we can all jump. Education was seen as focused on this small window and therefore perceived as not meeting the needs of many young people.

Young people needed outlets that affirmed youthful self-expression, the young’s need for joy. This came through creative social activity. As one young woman noted, people “need to focus on quality of life, being happy. They need to find out what they’re passionate about and focus on that.” A number of respondents referred to positive local and state initiatives in the arts but still wanted more. Indigenous culture also needed more forums to be celebrated.

Fear was seen as a major stumbling block in intergenerational dialogue and a failure to recognise the state of flux that defines society today. Generalisations about youth need to be rethought. As one respondent put it, “Everyone has a meaningful uniqueness, which can be tapped into if they feel they are valued and their difference is important.”

Cultural creatives

Young people saw themselves as an underutilised resource. They felt angry that their situation was limited to stereotypical images portrayed in the media. There was general consensus that “Young people who want change don’t want to work in the system.” This rejection is the result of cynicism over the ability of government to represent broad social interests. Rhetoric was seen as a tool of government. “The Government has a literary view – writes things, talks about things, but doesn’t put things into practice.”

Young people were seen to have many characteristics in common with cultural creatives (Ray *et al.*, 2001) who reject

the system, work locally, and seek empowerment through loose knit partnerships that can effect positive change within the limits of the individuals concerned. To many young people the prospect of change was exciting. They were innovative and open minded and quite prepared to engage with opportunities to learn and better themselves and their world.

There was a general consensus between all groups that “We need to stop judging today’s problems with yesterday’s solutions”; as one young woman put it: “If you always do what you’ve always done, you always get what you always got.”

Values: meaning and community

The young people interviewed are passionate and aware. They link strong community with a sense of personal meaning and fulfilment, putting a high premium on building community that values and empowers all age groups (Johns *et al.*, 2001, pp. 20-5). Intergenerational dialogue is part of this vision as it shares wisdom rather than hoarding it.

Such a community also fosters identity. One respondent put it this way: “We need to get involved in communities to feel a sense of belonging – sway away from this consumerist society and towards a more empowered, involved, aware way of living.” Young people have a sense of being abandoned and isolated. They desire a society that puts “people before rules” and is rich in a network of relationships that are real not legislated.

Women in particular were sceptical of the information revolution with all its hype. It was noted that wisdom was more important than knowledge and that wisdom was not a commodity but an approach to action. Thus one respondent observed that what was important was “wisdom rather than knowledge (Government has knowledge but no wisdom)”. Another noted that “I don’t want to change who I am – just get wiser but no different.”

Intergenerational relationships were seen as important by all. White Australians looked to egalitarian relationships based on mutual respect while indigenous respondents emphasised the need for young people to approach elders with respect. It was recognised that everyone in a relationship has something to offer and wisdom is not the province of the aged, though undoubtedly experience and wisdom can go hand in hand. Relationship was seen as an important feature in rediscovering meaning in life beyond simply getting by or having fun. Joy was important and activity was linked to positive self-affirming work.

One young man talked about a “reality revolution” in which trust and respect were the ethos of relationship. Another stated that “I hope that we will regain our belief in humankind as being a wonderful thing.” Global community was also touched on and issues of equity and justice of a planetary nature were considered important. Society needs to chart a “direction away from consumerism”.

The ethics of human action was also referred to a number of times with one young woman stating that “Being moral and having values is a part of human nature and not a part of conforming to society.” Meaning was found in relationship, it was spiritual but not necessarily institutional (Webber, 2002, pp. 40-3; Abbott-Chapman, 2000, pp. 21-5). Some considered that we need to move to “Something more than institutional religion”, noting that “Everyone is a powerful creator of their world”.

Implications for policy

Applying probable, possible and preferred futures analysis to these responses allows us to see that governments, through this process, have the opportunity to generate policy that is responsive to broader issues than previously considered the domain of government.

Scenarios

1. The probable future: business as usual

The probable futures scenario is very much business as usual with policy concerning itself with vested interests at the centre of social activity. The gap between rich and poor will continue to widen with the inherent stratification in age cohort and class becoming increasingly intransigent. Older people will become ever more jealous of their rights and there will be an escalation of issues relating to the young and social disobedience. Policy will be palliative and cosmetic and large amounts of government resources will go into developing sophisticated rhetorical machinery to disguise social inequities.

2. The possible future: community building

The possible future scenario moves beyond business as usual and allows for an expansion of ideas in social capital to generate innovative policy that is piecemeal. There will be a lack of clear long term goals and thus little consistency will occur with policy jumping from one issue to the next as public opinion and the media write the agenda. Policy will remain vulnerable to vested interest groups. There will be some attempt at community building and the creation of effective infrastructure to make intergenerational dialogue meaningful and productive. The onus for this will remain very much with individuals and community groups and it will be driven more by local than state level needs.

3. The preferable future: a responsive policy

The preferable future scenario will see governments accessing all levels of society in order to generate responsive policy. The consultation process will be similar to action research methodology and will maintain conversation with the population through focus groups and roaming consultants. The well being of all will become a public concern with issues of intergenerational equity rising to the fore. Initiatives will be community based and aim at inclusive processes that engage marginalised and at risk sections of

the community. Communities will drive local action but work in conjunction with the state in the clarification and coordination of priorities.

Reflections

Despite popular images that suggest young people are often left in the margins of Queensland society, they themselves feel that they are partners in its ongoing evolution. The values elicited in the discussions reported on here are consistent with this view. Young people are not alone in challenging the values of consumerism and the “me society” but rather can be seen to be active participants in a social discourse that has the potential for critical self-assessment.

Dawkins and Kelly point out that ageing in itself is not a problem, it simply requires, in the words of The Intergenerational Report, “forward planning” (Dawkins and Kelly, 2003, p. 125) and furthermore this planning requires a “whole-of-government approach” (Dawkins and Kelly, 2003, p. 203). In this way policy enacts and models a “whole-of-community” approach that will engage all stakeholders in active forward planning.

Policy can evoke a range of values and is in a position to build on the aspirations of young people to work against the current tide of individualism and community dislocation. Engaging with the shared values outlined below has the potential to create public space in which intergenerational dialogue and equity moves beyond rhetoric to actual social praxis.

Short-term planning will result in a form of the probable future described above with further degradation of Queensland’s social fabric; the piecemeal work of individual departments might produce the possible future of communities engaged in local restructuring, but it is only possible to achieve the preferred future of responsive policy if departments work together with a shared vision that is responsive to community and driven by values that are consensual and just.

I include a possible action plan to achieve the preferable future in Appendix 3.

Toward shared values

Values need to be clearly articulated in order to shape proactive policy. The young people interviewed clearly value:

- *Community*: Self-worth is fostered by a sense of belonging and participation in socially validated activity, indigenous, rural and urban youth all want to feel part of their communities, intergenerational dialogue underpins this engagement.
- *Inclusivity*: Accessible and meaningful education, dialogue with “elders”, clear communications with developers of policy, intergenerational equity.
- *Security*: They want work that is meaningful, they appreciate the need to work with older people in a

variety of settings in order to gain skill, knowledge and wisdom.

- *Innovation*: Young people are risk takers, they are prepared to try new social forms, and are enterprising in building successful pathways.
- *Joy*: Young people are not alone in their need for fun, they are actively defining themselves through social networks that stimulate creative expression.
- *The environment*: Young people want to work for a greener sustainable future, as this is an important source of hope for future generations.

Young people require policy to enable these values by promoting partnerships in the community and empowering them to participate, not as clients, but as equals in relationships that generate human potential that is open ended. In this lies their hope and while not all young people are hopeful, two abstained from attending because “society sucks”, young people can respond readily to possibility and joy. As Kristeva, social commentator and psycho-analyst, points out:

We know perfectly well that it's up to us to transform reality, but the transformation depends on our mental state, on the forms of discourse we adopt, and if our symbolic disposition leans more towards that of the dance, and of optimism, we have a stronger hold on reality than if our disposition is that of lamentation and melancholy (in Zournazi, 2002, p. 74).

Responsive policy

Queenslanders will benefit from responsive and flexible policy that grows out of ongoing partnerships with communities and businesses. Issues of intergenerational equity and dialogue can then be explored in real life contexts, which are mediated with policy that develops in response to real life processes. Ageing is not a problem *per se* but may become so should we fail to prepare a social milieu that is inclusive and dynamic. Constructive policy is best generated by a whole-of-government approach and could have all or some of the following features:

- strong community links that focus on the needs of local areas and generates possibilities that build success;
- innovative and long-term planning built on vision and clearly defined goals;
- balanced approaches that acknowledge that long-term objectives may sometimes conflict with short-term gains;
- recognition that fear is a real obstacle to positive social change and thus create security through a wide range of personal and social responses;
- active engagement with culture (everything from art and dance through to sport, environment and tourism);
- inclusive approaches that enable all members of the community to participate fully in society as cultural creatives, in their own way;

- non-interventionist approaches that stimulate and support local solutions and initiatives while being “hands off”.

Young Queenslanders understand that their needs are no more important than other sections of society. Their responses to the issue of structural ageing are varied but consistently acknowledge the need for intergenerational equity that embraces them as a significant stakeholder in Queensland's future.

Notes

- 1 The construction of the social category of youth and the media's involvement in this is effectively outlined in Wyn and White, 1997.
- 2 See for example: *The Courier-Mail*, “Time for their lives”, 1 March 2003, p. 3.
- 3 Witness the sophisticated advertising by Coca Cola, also the imaginery of popular music shows such as Rave. See Wallace and Kovtcheva, 1998, p. 170ff.
- 4 There is a marvellous representation of this imagery in the photograph accompanying the article “The party ain't over till the riot squad arrives”, *The Australian*, 1-2 March, p. 4.
- 5 This interesting assertion resonates with Hawken *et al.*, 2002.

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Appendix 1. Overview of participants in focus groups and interviews

Region													
City				Sunshine Coast				Country					
16				15				6					
Ethnicity													
Aboriginal		Anglo-Saxon		European		Oceania/Japan		Torres Strait		Islander			
5		23		5		3				1			
Age													
13		15		16		17		18		19		20	
3		1		3		5		4		1		2	
Education													
School		Finished High School				Left High School		Further Education				Graduated	
10		13				2		6				3	
Social													
				Waged		Unemployed				Two parent		Sole parent	
Independent		PT 6 FT 4		5									
Dependent		12								11		7	
NB: These numbers are incomplete													

- (2) Generate resources for future actions through community enterprise.
- (3) Policy promotes a climate in which industry and capital shift emphasis from consume and waste, to recycle and redistribute.
- (4) Health and safety linked with active community participation.
- (5) Intergenerational dialogue celebrated through a range of cultural festivals.
- (6) Apply concept of “biomimicry” (i.e. community as an eco-system) to community building in which all human and natural resources are encouraged to flow in an exchange of services that sees no waste (i.e. marginalisation).
- (7) Schools work in partnership with local community and business enterprises to maximise young people's experiences in the “real world”.
- (8) Elderly people take leadership positions in a range of government sponsored projects.

Long term (20 years)

Society for all ages

- (1) Skills and mentoring go hand in hand as policy focuses on human need to maximise life experiences and share these.
- (2) Health and safety issues are linked with high degree of purpose and agency.
- (3) Indigenous models of cultural reproduction, the story, the elder, the earth, cherished as map for government and community processes.
- (4) Self interest and community interest harnessed as same in policy applications that educate and reinforce.
- (5) Government has become more flexible and accessible and is infused with an holistic approach which still recognises the needs and priorities of departmental action but balances this through whole-of-government approaches to social planning.
- (6) Wisdom as a way of acting is applied to social and natural capital in order to maximise cultural enrichment and creative opportunities.

City of the aged versus City of all ages

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Keywords Cities, Demographics, Population distribution

Abstract *In this article I deconstruct the polar cultural myths about ageing and how these two influencing memes generate two contrasting scenarios for the future of the city. One meme can be seen as a weight resisting the preferred future whilst the other provides the attractive pull towards the preferred image. Both are interlinked by the reality of an ageing global population – a demographic driver that is shaping the city of tomorrow. This preferred image however is not inevitable; I argue that memetic change of Western society's episteme of ageing is fundamental to achieving the City of all ages.*

Introduction

Globally the number of older persons (60 years or over) will nearly triple, increasing from 606 million in 2000 to nearly 1.9 billion by 2050 where eight of every ten of those older persons will live in less developed regions. In more developed regions the population aged 60 or over currently constitutes 19 per cent of the population; by 2050 it will account for 32 per cent of the population. In developed regions there will be two elderly persons for every child (persons aged 0-14 years) (UN, 2002, pp. viii-ix).

In 2000, 69 million persons in the world were aged 80 or over (the oldest old) and they were the fastest growing segment of the population. By 2050, they are projected to reach 377 million, increasing more than 5.5 times. Although the proportion of the oldest old is still low (1.1 per cent of the world population), it will rise to 4.2 per cent in 2050 (UN, 2002, p. 16). Seven of every ten oldest of the old will live in less developed countries.

The first wave of official baby boomer retirees will emerge in 2006 at the age of 60.

The second wave will hit in 2011 when more turn 65 and retire.

By 2026 the baby boomers start to turn 80 – the oldest old.

How will this significant demographic driver affect the City of the future? Though this question can be asked across different civilisations – for example using Huntington's typology of civilisation blocks – from Japanese, Buddhist,

Orthodox, Hindu, Sinic, Islamic, African, Latin American and Western; the focus of this question will be aimed at Western and developed nations?

I use Wilber's "all quadrant, all level" integral model of the Kosmos (Greek word for the patterned whole of all existence, including the physical, emotional, mental and spiritual realms) to explore an integral vision for the city of the future, though I state now that I do not conclude with an integral vision (Wilber, 2001; also Wilber, 2000). An integral vision using Wilber's definition is an attempt at a genuine theory of everything that aims to include matter, body, mind, soul and spirit as they appear in self, culture and nature. A vision that embraces science, art and morals that equally includes all disciplines. To facilitate this attempt, Wilber develops a model comprising four quadrants that covers the "I" (self), "IT and ITS" (nature) and "WE" (culture). Refer to Figure 1. In this paper, I limit my discussion to the inner collective ("WE"; cultural or intersubjective quadrant) and outer collective ("ITS"; social systems or interobjective quadrant) perspectives about ageing and city futures. The two key questions are:

First, what are our shared values and memes about ageing within our Western culture, that drives our actions and policy about the issue? Second, what do we collectively commit to doing to our urban habitats (one attribute of our social system) in response to the ageing population?

It is because of this limitation of exploring only the issue of ageing from one civilisation's perspective – that of the Western developed nations – across two of the four quadrants that I cannot and do not conclude with an integral vision for the city of the future, in this paper.

First, I develop two contrasting scenarios for 2025. One scenario will be based on the "continued-growth" archetype,

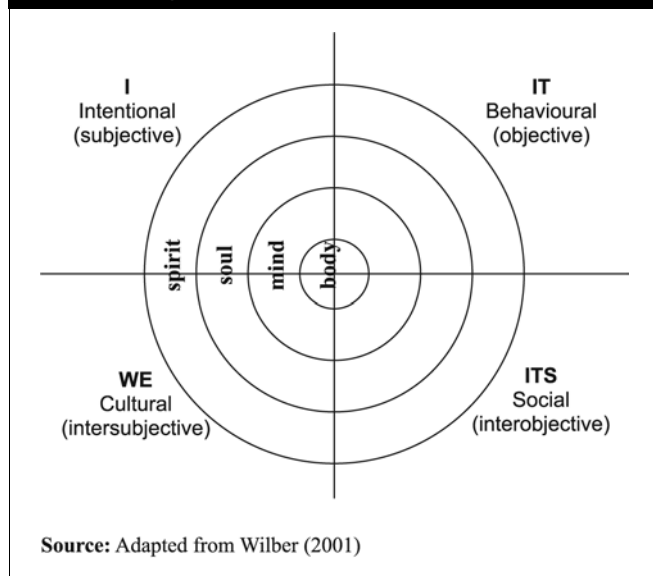


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Figure 1 — Ken Wilber's "All quadrant, all level" integral model of Kosmos



whilst the other will be a “transformation-by-values” archetype. Causal layered analysis (Inayatullah, 2002), a futures studies technique will be used to explore the deeper differences between these scenarios at litany, social science, worldview and myth levels which affects our response to ageing and city policy.

Second, to explore our collective commitments, I outline a human lifecycle model developed by Erikson and adapted by Alexander (1977), which can be used to broaden the response between the urban design of the city and the reality of human ageing. The key message that emerges from this model is that the challenge for urban/city policy is to re-create a community of balanced lifecycles, spatially and temporarily (through time) where the human rites of passage are celebrated and supported by the architecture of the city.

I conclude that one vision for city policy becomes apparent – that of the green, socially inclusive city, but the social driver of an ageing population will not, in isolation, be enough to achieve it. Human values and our memes about ageing need to be transformed to transform the built environment.

Neighbourhoods planned for older people, work for everyone and are more sustainable. Finally the city of the future needs to be designed to provide nurturing settings to support any single stage of human life, support ritual passing from one life stage to another and mark interaction between stages.

The tale of two ageing cities

Using the archetypal scenario[1] generation method, two contrasting scenarios for the city of 2025 (the dawn of the age of the oldest old) will be described. A continued-growth scenario will be contrasted by a transformation-by-values

scenario. Refer to Table I. The differences between the two at the systemic (social science) level will be described using six internationally accepted indicators for productive ageing. These are security, involvement/participation, independence/autonomy, integration, dignity/self-fulfilment and creativity (Earle, 2003). These systemic approaches are however nested in worldviews – cultural paradigms – that are in turn, themselves based on civilisational myths and metaphors. Causal layered analysis will be used to map the depth of these alternative futures by deconstructing their inter-related levels.

Continued-growth scenario: decrepit, dying cities

In this scenario, security for the aged is manifested by the “strive-drive” meme where the basic motive of human behaviour is possibility thinking, focussed on making things better for self (Beck and Cowan, 1996; Wilber, 2001, pp. 8-13) Within the “strive-drive” meme, people analyse and strategise to prosper. Three aspects of security to be described in the scenarios for the Western world are housing, money and health.

The majority of aged live in their own homes as long as possible (UN, 1999). This current trend is unlikely to change. However a shift of location from the suburbs to the inner city and coastal sunbelts into gated, monitored fourth phase lifestyle communities/complexes will continue to increase.

The “I want” ethic pervades amongst the baby boomers. As a result, retirees lead in the unsustainable consumption of leisure (e.g. travel to plasma screens).

In this scenario there is a high risk of aged individuals running out of money, as the capital value of superfunds does not generate enough interest to maintain lifestyle over longer life spans. As a result the system heads for collapse.

The health system and attitude of its recipients is mainly treatment based.

Aged citizens seek involvement and participation within communities of interest focussed on personal recreation and health/wellbeing. Activities are concerned about meeting the demands of self-interest rather than the collective needs of the community of interest.

Decline in volunteerism in the community continues unabated and so too does knowledge transfer to younger generations because of the lack of intergenerational interaction.

Independence and autonomy of individuals is a strong characteristic of the “strive-drive” meme concerned with self-prospering. Two key aspects of autonomy to be examined are mobility and work.

In decrepit, dying cities, the aged suffer loss of access to cultural, economic and recreational resources of society. This is caused by ageism within Western bureaucracies, which continues to revoke car licences at 80, reducing the mobility of the aged as the majority live in a settlement pattern that is reliant on private vehicles. The narcissism of this meme obstructs the establishment of alternative mobility solutions

Table I — Comparative analysis of polar archetypal scenarios

Attribute: indicators of productive ageing	Continued-growth scenario	Transformation-by-values scenario
Security:	Manifested by “strive-drive”	Manifested by “human-bond”
Housing	Majority of aged live in gated, monitored fourth phase lifestyle communities/complexes	Majority of aged live in adaptable neighbourhood housing
Money	“I want” ethic	“We share” ethic
Health	Treatment based	Preventative based
Involvement/participation	Activities focus on ego	Activities focus on community
Independence/autonomy	Loss of basic access	Maintenance of basic access
Mobility		
Work	Opportunity to work denied/resisted “Society owes us” attitude	Opportunity to work promoted “We are part of society” attitude
Integration	Planned segregation “out of sight, out of mind” Tension between generations	Planned integration “old people everywhere” Harmony between generations
Dignity/self fulfilment	Incidence of “chronic social syndrome” (Earle, 2003) increases i.e. fear and rejection of the outside world Suicide/euthanasia rate increases	Dignifying third spaces outside the home and work provide fulfilment for women and men
Creativity	Life phase ≡ “retirement before death”	Life phase ≡ “community service and enlightenment”

for the baby boomers or “me-generation” e.g. effective public or community transport.

Opportunity for the baby boomers to work is denied or resisted, due to again the narcissism of the “strive-drive” meme where retirees hold the attitude that “society owes us” and younger generations seek to benefit themselves in a competitive yet limited workforce.

Integration is not a strong trait of the “strive-drive meme” and as a result, aged people in the continued growth scenario are not integrated within society or the city. Tension between generations grows.

In regard to urban habitat, an increase in the status quo dominates – poorly located; large retirement villages continue to operate creating segregated monocultures.

This settlement pattern and the psychological power of these places reinforce the strive-drive meme’s social values and perceptions of “out of sight, out of mind”.

City authorities do not pursue the creation of dignifying third spaces for aged people within civic spaces. Privatisation and corporatisation of public spaces in the city continues as the model to counter growing crime and social tensions between cultural groups and generations. As a result not many third (public) spaces exist that allow authentic social interaction between generations other than in the home or at work. Shopping centres or clubs with gaming machines offer social noise and attraction with legitimate unanimity for elderly women, whilst men jail themselves with chronic social syndrome (Earle, 2003) becoming more fearful and reclusive of the outside world.

Not surprisingly in this scenario, self-fulfilment is dependent on purchasing power and as the majority live by frugal means the loss of social dignity contributes to suicide and euthanasia rate increases.

Finally, in this scenario, society’s perceptions about the final life phase equates to “retirement before death”. It does not support productive nor creative ageing.

Transformation-by-values scenario: City of all ages

In this future, security for aged persons is manifested by the “human-bond” meme where the basic motive of human behaviour is the wellbeing of people and building consensus (Beck and Cowan, 1996; Wilber, 2001, pp. 8-13). Within the “human-bond” meme people explore inner self, equality and community.

The majority of aged in the transformation-by-values scenario live in their own homes as long as possible, similar to the continued growth scenario and current trends. The human-bond meme however drives a focus on community housing and housing cooperatives to pool resources, regardless of the geographic shift of the aged population to the sunbelt. City authorities promote and mandate the need for adaptable housing designs within residential developments to meet the different needs of the human life cycle.

The “we share” ethic dominates amongst the baby boomers who transformed their values from the preceding “I want” ethic. As a result, a resurgence of community banks and the formation of seniors’ trading cooperatives occur to meet the financial security needs of the elderly.

Retirees also lead in changing the consumption habits of society.

The health system and attitude of its recipients is mainly preventative based.

Involvement and participation is a strong trait of the “human-bond” meme. Aged citizens seek involvement within authentic value communities (freely chosen affiliations based on shared sentiments) as feelings and caring supersede

cold rationality. Activities focus on self-education and community service. Volunteerism increases across all areas of concern from ecology to economy. Aged citizens are engaged in formulating and implementing policies that directly affect their knowledge and skills transfer to younger generations.

The need for independence and autonomy for aged persons is understood and framed within the context of permeable self, relational self and group networking. The social emphasis is on dialogue and partnership.

In the City of all ages, mobility is assured by the rise of cooperative community transport services within local government areas to provide basic access to cultural, economic and recreational resources of society. An example is the Kiama model (Maroochy Shire Council, 2002) where a community care organisation in partnership with local and state governments provide non-urgent transport to aged or immobile citizens.

Opportunities for retirees to continue to work are promoted and practiced due to the “human-bond” meme’s dominant social attitude of “the aged are a part of society”. Labour markets offer a range of options including part-time, job share and mentorship.

Integration is a strong desire of the “human-bond” meme and as a result, aged people are an integral part of society and the city. Harmony between generations though still a dream is the object of urban policy initiatives. Neighbourhoods are planned or adapted to foster social interaction: polycultures – urban villages comprising adaptable housing for all ages with access to shops, transport, facilities and inclusive public space. As a result in this future, “old people everywhere” is celebrated.

In the City of all ages, dignity and self-fulfilment are key social principles. Accordingly, city authorities through planning policies encourage third (public) spaces other than at home or work for intergenerational social interaction. Also housing developments are required to provide home or communal workshops/sheds for men as social centres, and access/physical connectivity to cooperative learning networks for women. In this scenario, gains in social dignity contribute to the next indicator, creativity.

In this scenario, society’s perceptions about the final life phase equates to “community service and enlightenment”. It supports productive ageing.

Polar worldviews and myths about ageing that influence city futures

Casual layered analysis (Inayatullah, 2003, p. 37) is a futures studies technique, useful in exploring the deeper human aspirations and cultural paradigms/prescriptions that influence a systemic response to a problem or issue.

Using the contrasting scenarios described above, what are the differences that affect our response to ageing and city policy at the litany, system, worldview and myth levels?

The public litany generated out of the continued growth scenario is obvious today, from quotes such as “demographic time bomb” (Maroochy Shire Council, 2002, p. 8) and “burden on future health and welfare resources” from government reports. The concept of “intergenerational theft” has also emerged in the public debate where the claim that senior citizens have comparatively paid less tax than current citizens for their future social provision in retirement. Alternatively the transformation-by-values scenario is observed through the litany of community organisations such as National Seniors that promote “productive ageing” and “social contribution”. In Australia, Brisbane City Council’s “Growing old and living dangerously (GOLD)” (Maroochy Shire Council, 2002, p. 17) community development programme for senior citizens also offers litany supportive of the transformation scenario.

At the system level, the continued-growth scenario manifests a *laissez-faire* city planning approach, allowing market-led development outcomes for housing and social infrastructure. As a result city policies of urban separation develop, to respond to the myth that old people have specialised needs and public housing continues to be replaced with privatised, gated retirement villages and aged care facilities to reduce government costs. Alternatively the transformation-by-values scenario manifests an egalitarian/partnership planning approach, allowing diverse ways to achieve sustainable development outcomes. As a result, city policies of urban reintegration develop to facilitate a settlement pattern comprising urban villages, traditional neighbourhood design, and “adaptable housing” (Australian Standard 4299, see AS, 1995). Adaptable housing is designed to facilitate continued residency after adaptations so that people can remain in their homes, in existing communities and among friends and family networks, if their needs change. To allow this easily and cost effectively, housing is designed with a basic minimum standard of accessibility and provides features that can be easily modified and upgraded to suit the needs of residents and potential buyers as needs change during various stages through life as people age and acquire mobility restrictions (AS, 1995).

At the worldview level, the development of the continued-growth scenario is perpetuated by the underlying cultural paradigm of ageism – the denial of old age and that old people are different and a threat. The last life phase is primarily seen by society as the preparation of biological death. This is interrelated with Beck and Cowan’s “strive-drive” ethnocentric meme prevalent in Western cultures. Contrastingly, the development of the transformation-by-values scenario is driven by the cultural paradigm of shared humanity – the acceptance of the reality of the life cycle and that old age is valued. The last life phase is recognised by society as a period of contribution and eldership. Similarly, this is interrelated with the “human-bond” world centric meme.

At the metaphor/myth level the two polarising scenarios are simply defined by the choice between the fears versus the love of ageing. Shakespeare for his play *As You Like It* wrote the famous “All The World is a Stage” poem, where in the last two verses he describes the last actor or human life phase as “second childishness and mere oblivion” [2].

There is probably no better metaphor for ageing than Shakespeare’s contribution, during the renaissance, which, I think has had a profound impact on the proceeding industrial and modern societies. This “second childishness” metaphor gives opportunity for the social justification of the removal of privileges from older people that they enjoyed in adulthood. The alternative metaphor for ageing is that espoused by the phrase “wisdom of the elders”. Love and joy of life, no matter at what age gives opportunity for personal wisdom. “When we are centred in joy, we attain our wisdom” (Williamson, 1993). If culture promotes the last life phase to be enjoyed as a period of personal wisdom, the opportunity follows for intergenerational sharing of that wisdom.

In regard to the built environment, the resulting city metaphors that emerge from this analysis of the ageing population as a driver towards the future are the “decrepit, dying city” versus the “cities of all ages”.

These worldviews and metaphors are significant as they generate our collective cultural memes and values about ageing that drive our actions and policy. Effective policy development and implementation therefore needs to include the transformation of these memes and social values to affect change at the system and litany level. Refer to Table II.

Nexus between identity, the human lifecycle and city design

To return to the second question – what do we collectively commit to doing to our urban habitats in response to the ageing population? – I explore the relationship between identity or selfhood, the human life cycle and city design.

To help us understand this relationship, Alexander (1977) provides us with a framework, in his book, *A Pattern Language* (Alexander, 1977). Alexander argues that to live life to the fullest, each life phase must be clearly marked, by the community, as a distinct time by celebrations from the passage from one life phase to the next. Alexander claims that in a flat suburban culture, the life phases are not at all

clearly marked, they are not celebrated and the passage from one age to the next have almost been forgotten. Under these conditions people distort themselves. They can neither fulfil themselves in any one, life phase nor pass successfully on to the next. This proposition relies on two arguments. First, that the cycle of human life is a definite psychological reality. It consists of discrete stages, each one with its own special advantages and difficulties. Second, that growth from one stage to another is not inevitable, and, in fact, it will not happen unless the community contains a balanced life cycle.

The first proposition – the reality of the life cycle

Alexander cites the work of Erikson who developed a framework of eight discrete life phases, each characterised by a specific developmental task around the successful resolution of some identity related life conflict. (For example in regard to old age the resolution of personal integrity versus despair.) These are summarised as the:

- (1) infant (trust vs mistrust);
- (2) very young child – toddler (autonomy vs shame and doubt);
- (3) child (Initiative vs guilt);
- (4) youngster (Industry vs inferiority);
- (5) youth (Identity vs identity diffusion);
- (6) young adults (Intimacy vs isolation);
- (7) adults (creativity vs stagnation); and
- (8) old age (Integrity vs despair).

Other life phase frameworks emerge from other cultures. Galtung has applied the macro history of civilisations as a metaphor for micro history (Galtung and Inayatullah, 1997) – the personal development of individuals in life or human life phases. Galtung compares four life phase frameworks that can be observed within different cultures, being the standard Western life cycle, the Hindu life cycle, the Greek lifecycle and Rudolf Steiner’s framework.

The Western life cycle relates the individual to society with regard to input-output exchanges. The four life phases are:

- (1) childhood (five years);
- (2) education (up to 20 years);
- (3) work (40 years); and
- (4) retirement (15 changing up to 20).

Table II — City futures and ageing policy		
Level of analysis	Continued-growth scenario	Transformation-by-values scenarios
Litany	“Demographic time bomb”, “burden” and “intergenerational theft”	“Productive ageing”, “social contribution” and “growing old and living dangerously”
System	<i>Laissez-faire</i> planning and market led solutions Urban exclusion	ESD planning Partnerships (public/private/community) Urban reintegration
Worldview	Ageism – deny old age	Human lifecycle recognition – value old age
Myth/metaphor	About ageing – “second childishness and oblivion” About the city – decrepit, dying cities	About ageing – “wisdom of the elders” About the city – cities of all ages

The Hindu life cycle relates the individual to society with regard to changing modes of behaviour from duty, to provision of sustenance, to pleasures and enjoyments to finally self and god realisation. The four life phases are:

- (1) brahmacharyashrama – student (20 years);
- (2) arthastshrama – family (20 years);
- (3) vanaprastashrama – social/cultural service (20 years); and
- (4) sanyastashrama – enlightenment (20 years to eternity).

The Greek life cycle consists of ten phases of seven years each. The Greek framework resembles Erikson's model as the life phases describe the progression of personal identity and realisation within society. The ten life phases are:

- (1) fantasy life (0-7);
- (2) self-presentation (7-14);
- (3) puberty and adolescence (14-21);
- (4) exploring the life basis (21-28);
- (5) reinforcement and verification of the life basis (28-35);
- (6) second puberty with possible reorientation (35-42);
- (7) the manic-depressive period (42-49);
- (8) images of one's own decline and fall (49-56);
- (9) reconsideration (56-63); and
- (10) second youth and possible new climax (63-70).

Finally, Steiner's life cycle model is also consists of ten phases of seven years each, based on the complex interactions between biological, psychological and spiritual factors. The ten phases align with four major developmental periods, which are:

- (1) development of the body – phases 1-3 (0-21 years);
- (2) development of the mind – phases 4-6 (21-42 years);
- (3) development of the spirit – phases 7-9 (42-56 years); and
- (4) consolidation and personhood – phase 10 (56 onwards).

Comparing these different life phase frameworks to that of Erikson's model, the following observations can be made about what cultures outwardly think about ageing and how this affects our collective actions/policy (Figure 2).

The purist Western view (Occident) of ageing tends to see this life phase as economically unproductive, and a period of psychological struggle between personal integrity versus despair. This is demonstrated by the Greek view which emphasised a period of reconsideration. Reconsideration of the relationship between a person and the world and with humanity; the achievement of wisdom, love for oneself and others, to face death openly with the forces of one's life integrated versus the despair that life has been useless. If reconciliation is personally attained, then the individual is indeed spiritually free to pursue a second youth, full of enthusiasm. This life phase is expected to last 15-20 years (one-fifth to one-quarter of a lifetime) in Western cultures. Contrastingly, the Hindu perspective (Orient) of ageing beginning with the third stage, tends to position it as a productive time for community service of humanity and cultural

growth, which leads to the fourth stage of wisdom and liberation, transcending in this physical life the limitations of the body. This leaves half of the Hindu life cycle for cultural contribution and self-realisation. Steiner is more positive than his Western cultural context, as he defines the last life stage as a period of personal consolidation. At this point an individual has achieved personhood and can give back the fruits of his life.

It is easy to see how the Orient is positively influencing the Occident in regard to the way we think and act about ageing. Increasing proportions of older people in Western societies and their life spans are challenging us to examine our myths and fears about growing old as well as confront the destructive denial of ageism.

The second proposition – growth through the life cycle is not inevitable

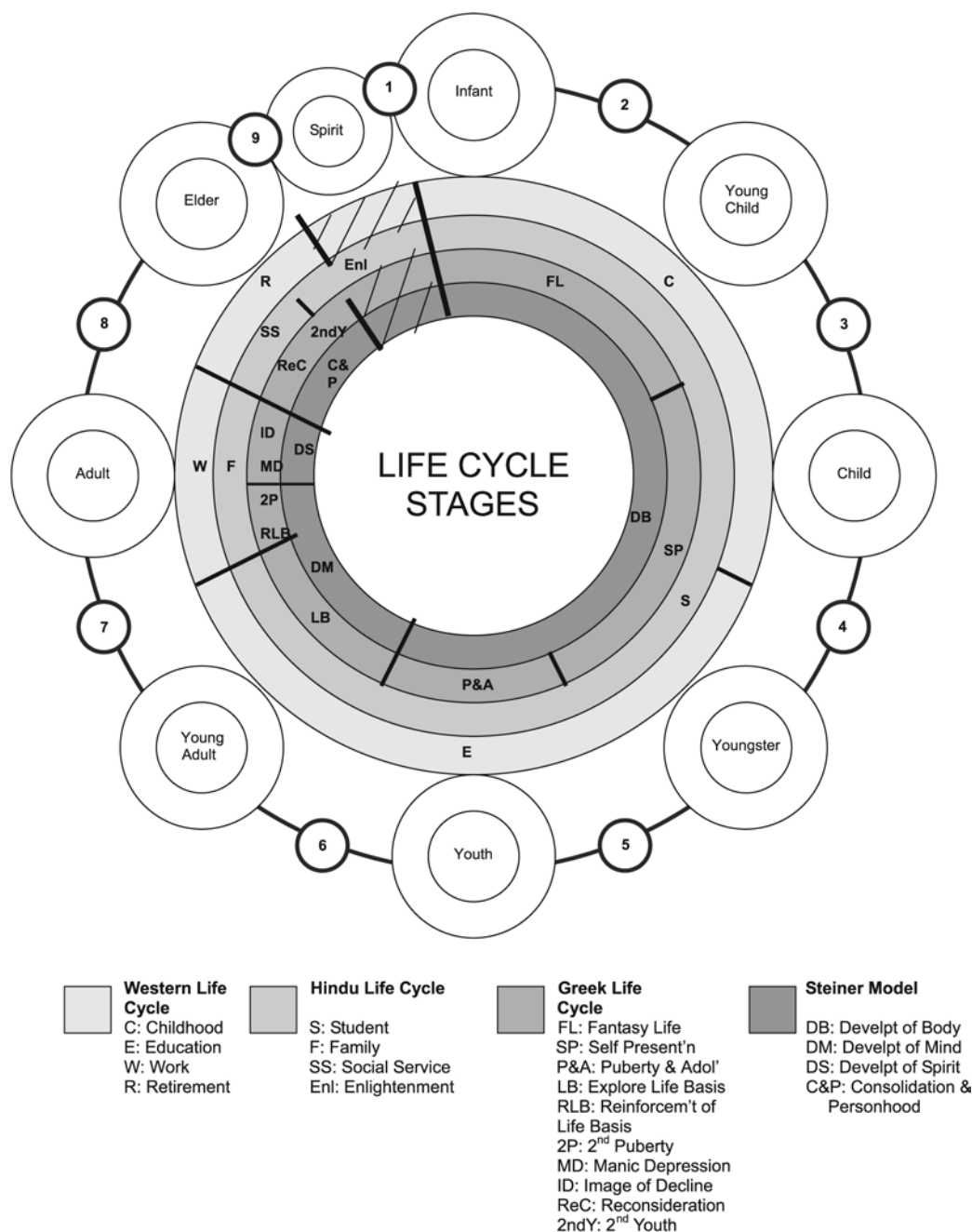
Personal development depends on the presence of a balanced community. Persons at each stage of life have something irreplaceable to give and to take from the community, and it is just these transactions, which help a person to solve the problems that beset each stage (Alexander, 1977, p. 142) (Figure 3).

Alexander uses Erikson's life phase framework to propose an urban design policy aligned with the reality and purpose of the human life cycle. He argues that the urban environment needs to be designed to support intergenerational social transactions, as well as provide a balance of spatial settings that support the needs of each life phase. This same argument is supported by the research of Putnam, where a decline in social capital can be directly correlated to increasing distances and travel times within urban sprawl (Putman, 2001).

For each life phase, Alexander identifies the important spatial settings that support that period of human experience, as well as the landmarks to support ritual passing from one life phase to another (Figure 4). I have revised this model as new spatial typologies have emerged since Alexander first published the model in 1977. For example, additions include cyberspace on the World Wide Web, the lifestyle gym, locus of a community project and leisure centres.

In regard to older persons, the important settings that support this life phase includes the home for family interaction and the home workshop/shed or place of settled work (Alexander, 1977, p. 734). Settled work is the work which unites all the threads of a person's life into one activity: the activity becomes a complete and wholehearted extension of the person behind it. The experience of settled work is a prerequisite for peace of mind in old age. Yet society undermines this experience by making a rift between working life and retirement and between workplace and home. Australian research about the backyard shed clearly shows that this spatial setting is an important intergenerational social centre for Australian males (Earle *et al.*, n.d.), and its loss due to relocation to some other form

Figure 2 — Compilation of life cycle frameworks



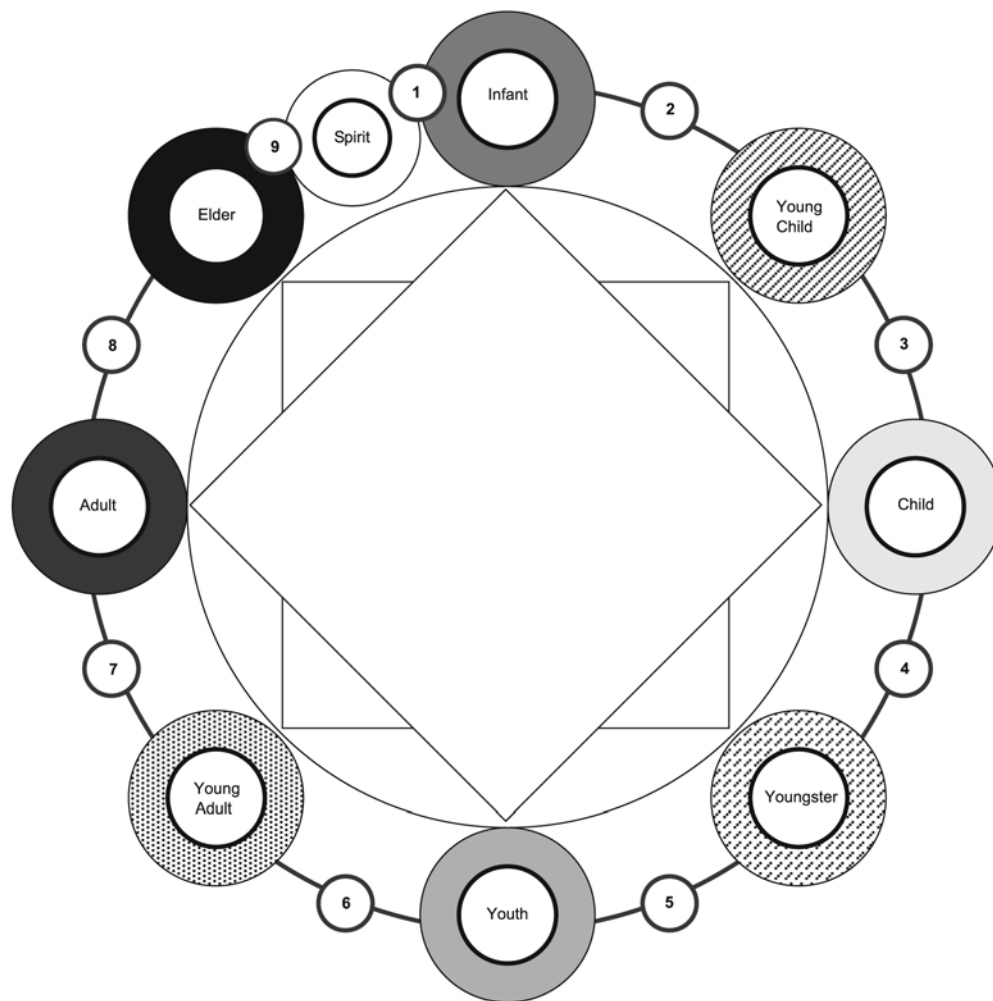
of accommodation at retirement, is detrimental to the wellbeing of the male and his spouse. Other important settings include cultural facilities, libraries and places of cultural/eco tourism. Important settings for the elderly that mark interaction between life stages include public spaces, community or botanic gardens, the locus of a community project and the lifestyle gym.

Alexander concludes that the built environment must be organised to support the full cycle of life in each community.

This means:

- That each community include a balance of people at every stage of life, from infants to the very old; and include the full slate of settings needed for all these stages of life;

Figure 3 — Life cycle phases and their important settings



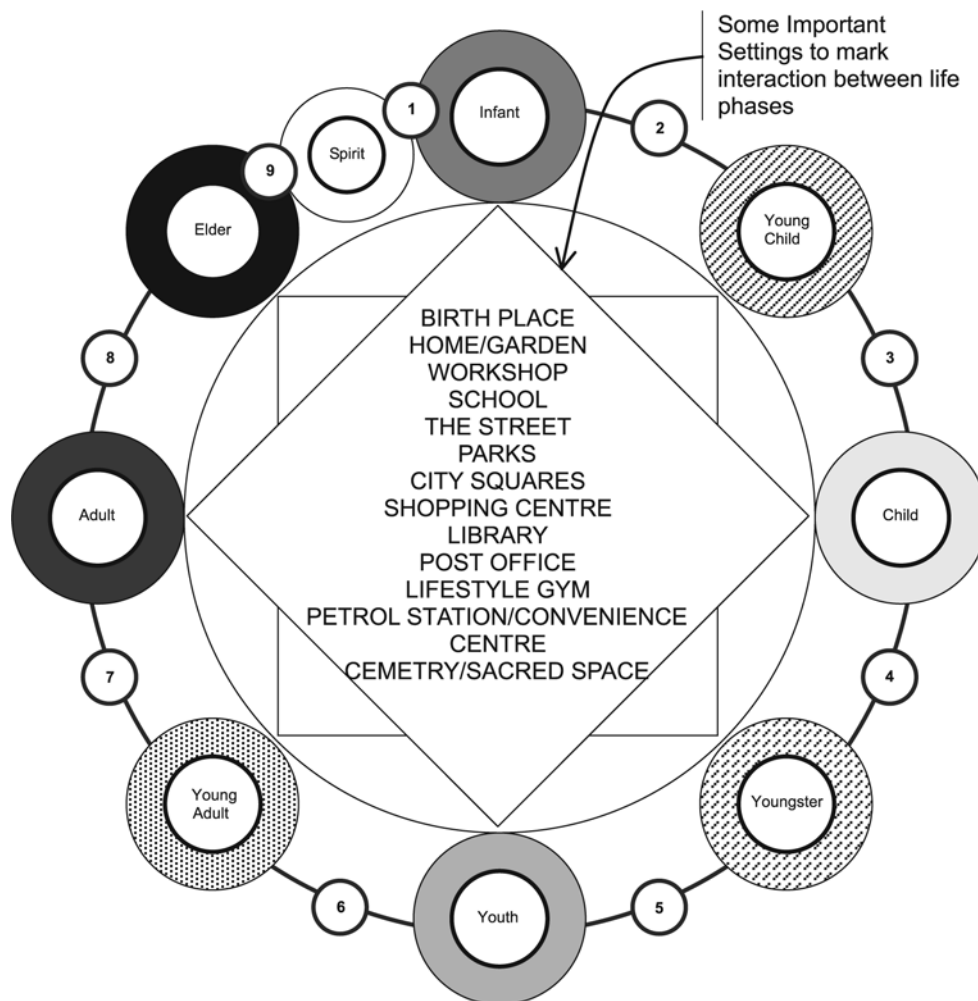
Important Settings for Each Life Phase

	Home, Crib, Nursery	Teenage hangouts, Teenage wing Town and region
	Own Place, Children's realm/yard Connected play, couple's realm	Household, couple's realm, work place. Higher Educational institutions
	Play Space, own place, Park, Neighbourhood, animals	A room/home of one's own. Workplace, community centre, the car, the shed
	Friend's homes, school, own place Adventure play, club, community	Home/cottage, workshop, the family, cultural facilities, tourism regions

Erikson's Life cycle

	Important places/landmarks to support ritual passing from one life stage to another	Rite of Passage
1	Birthplace – Home, birthing ctr, hospital	<i>Birth</i>
2	Home, Bedroom, own place	<i>Out of the crib, parents making a place</i>
3	Home & Garden threshold	<i>Walking, making a place, special birthday</i>
4	School, residential street, park, sports fields/facilities	<i>First ventures in public space, town and or nature</i>
5	Corner store, leisure/shopping ctrs, main- street, public space, bedroom, cyberspace	<i>Puberty rites, private entrance, paying your way</i>
6	Legibility of built environment, night clubs/pubs/café bar, car sales	<i>Commencement/commitment eg work, relationships, leave home, driver's licence</i>
7	First home, birthing place	<i>Birth of child, creating social wealth and family capital</i>
8	Public spaces, cultural facilities, the gym, locus of community project	<i>Special birthday, family gathering, change in work eg retirement</i>
9	Place of Death – home, hospital, palliative care, cemetery/grave site	<i>Last rites, funeral service, burial</i>

Figure 4 — Important settings for rites of passage



- That the community contain the full slate of settings which best mark the ritual crossing of life from one stage to the next (Alexander, 1977, p. 145).

Conclusion

Research from the urban planning field indicates that if neighbourhoods are physically planned for older people they work for everyone. For example, the construction of adaptable housing within our neighbourhoods suits the needs of all stages of the life cycle. Communities planned with older people in mind are also more ecologically sustainable. They rely less on car transport, focus more on the creation of walkable mixed-use village type living and recognise the social importance of neighbourhoods. Communities planned in recognition of the needs of older people emphasise intergenerational social contact and capital and are as a result are more socially sustainable.

The ongoing wave of baby boomers is a driver towards the city of the future, but it alone is not sufficient to achieve the preferred vision of a “green, clean socially inclusive city” – that born out of the “human-bond” meme. We need to examine and challenge our Western (Occident) myths and fears about growing old as well as confront the destructive denial of ageism that our culture perpetuates. Human values need to be transformed using public education programmes about the reality of the human life cycle and community based projects/ prototypes to allow the physical transformation of the city’s environment.

Finally, the City of the future needs to be designed to provide nurturing spatial settings to support any single stage of human life, support ritual passing from one life stage to another and mark interaction between stages.

Notes

- 1 These have been developed by Dator. Available at: www.futures.hawaii.edu also used by Inayatullah, S. "Teaching futures studies: from strategy to transformative change", *Journal of Future Studies*, Vol. 7 No. 3, February (2003, p. 38).
- 2 Shakespeare, *As You Like It*, II. viii.

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Women's working futures – views, policies and choices

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Keywords Social policy, Women, Working practices, Demographics

Abstract *Changes in the economy, workforce, technology, population and family structures have implications for women's working futures. Longer life expectancy and an increasing proportion of older people in the community are expected to influence fiscal, economic and social policy and put pressure on government income support systems. These pressures will be exacerbated by older workers leaving the workforce. With an increasing proportion of older people in the population and increasing health and longevity, paid work after the age of 65 years may become an option or a necessity in the future. The focus of this paper is on women of the baby boom generation, their working futures and the issues that will influence their work-retirement transition. This is explored from the viewpoint of Australian women and from a social policy perspective.*

Context

The experience of rapid and radical change in the world around us is shaping our aspirations, hopes and fears for the future. Greater exposure to global markets and changes in the economy, workforce, technology, population and family structures have implications for local communities, living arrangements, public expenditure and revenue, labour force participation rates, retirement decisions and consumption patterns. Longer life expectancy and an increasing proportion of older people in the community are expected to influence fiscal, economic and social policy and put pressure on government income support systems. These pressures will be exacerbated by older workers leaving the workforce. With an increasing proportion of older people in the population and increasing health and longevity, paid work after the age of 65 years may become an option or a necessity in the future.

A number of changes in the labour market are based on long-term trends, such as the increase in female participation in paid work, the growth of service sector employment and a growing occupational share by professional and managerial workers. Other changes, for example high rates of unemployment, the erosion of the centralised award system, the decline in public sector employment and the diversification of employment arrangements represent a break with or reversal of post-war trends, or a return to prewar trends (Hancock *et al.*, 2000, p. 9).

Jones (1998) argued that since the 1960s most OECD countries have been passing through an employment revolution, marked by the creation of a dual labour market with traditional male areas of work (e.g. process or manual labour) facing extinction, while service work – largely female work, often part-time or casual and without job security – is proliferating. Consequently, high levels of employment and unemployment occur simultaneously. This apparent contradiction occurs because men who were traditionally in work are now out of it, and women traditionally out of work are now in. The information sector and low grade service jobs have been the largest growing areas.

The increased labour force participation of women and declining male labour force participation might suggest that women's increased access to paid work is balanced by men's increasing responsibility for unpaid work. However,



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this is not so. Hancock *et al.* (2000, p. 11) noted that the male participation rate has been centred on the loss of full-time jobs, while the increase in female participation has largely been in part-time work. Further, they argued that a growth in two-earner households and no-earner households confirms that the growth in women's labour force participation is not a general trend but hides an increasing polarisation of women's experience along lines of class, education, geography and ethnicity.

Since the 1960s women's labour force participation has increased steadily in all Western countries. However, a gender gap between men's and women's labour market participation is still a common feature in all industrialised countries. The size of this gender gap varies from one country to another. It is smallest in the Nordic countries where, for example, over 80 percent of mothers with children under three years are employed (Rantalaio, 1997). In Australia, it has been estimated that for the year 2000, men were in paid employment for 38 years on average, with the figure for women being the equivalent of 20 years of full-time paid work (Clare, 2001).

Even when length of employment, qualifications, occupation and age are accounted for, women have historically received lower wages than men. A recent study (Reiman, 2001) found that there was a gross wage gap of 13 percent in the Australian workplace. Further, gender inequality in earnings rises with occupational status, and the relationship between occupational status and earnings is weaker for women than for men (Ginn *et al.*, 2001).

A significant proportion of women work part-time, and many more women than men are dependent on social security payments. Part-time work is generally associated with poorer working conditions, job insecurity, lack of fringe benefits and lower hourly pay (Ginn, 2001). Not all part-time jobs are permanent and fewer such jobs enjoy conditions like holiday pay, sick leave, employer superannuation payments and job security. Women who work part-time tend to be locked out of career structures designed for full-time employees, while casual employees have less access to employer-sponsored training (Williams and Thorpe, 1992; Kaul, 2001).

Bianchi *et al.* (1999) examined married women's dependency on their husbands' earnings in nine Western industrialised countries. They found that wives' dependency increases with age, the presence of young children and the number of children. It is reduced when wives' labour force participation and education are high relative to their husbands' and in families that rely more on unearned sources of income. The authors concluded that the similarity of patterns across countries suggests that gender differences in the work-family nexus are deeply entrenched in all countries and continue even in the face of very active social policy to minimise their effects.

It has been argued that women are disadvantaged by horizontal and vertical occupational segregation. Horizontal segregation refers to the recruitment of men and women into sex-typed masculine and feminine occupations (e.g. women in care giving, teaching, services and offices; men in technical design and operation, maintenance and repair, construction, transport and traffic), while the term vertical segregation has been used to describe the way in which men are most commonly found working in the highest levels within occupations, while women are found in the lower grade occupations and the lowest levels within the same occupation (Williams and Thorpe, 1992; Rantalaio, 1997).

Paid employment has come to be regarded as synonymous with work (Probert, 1998; Biesecker and von Winterfeld, 2000). According to Williams and Thorpe (1992), this illustrates an unprecedented cultural dependence on one form of work, and a failure to recognise the importance of other forms of work, such as the work of the homemaker.

Ginn *et al.* (2001) reported from Britain that time budget data indicates that unpaid household work exceeds paid work and would cost up to 120 percent of GDP if paid at average wages. Yet, they argued, that "the only time that women's unpaid work is valued in financial terms is when, through accident or death, an insurance claim must establish the cost of replacing it with paid services" (p. 26).

Mitchell and Thompson (2001) suggested that the costs of caring serve to penalise many women: health costs, relationship costs, career costs and financial costs, both in the short and longer term. Further, as a result of women's greater life expectancy and the age differential in marriages, most men can expect to be supported by wives in old age while most women rely on help from other sources (Scott and Wenger, 1995).

What do these changes mean for the women that are now approaching retirement? What are the views of women of the baby boom generation? What policies should be developed and implemented to address population ageing?

The baby boomers are a diverse and large group of people born during the years following the Second World War (1946-1964). The oldest baby boomers are now in their mid-fifties and have started to retire. As a group, they differ from previous generations: they are healthier and have more active lifestyles, are more highly educated, they grew up during times of economic growth and are accustomed to an economy of personal credit, long-term mortgages, and deficit spending on all levels of government, they had children later, have moved away from traditional family patterns, have experienced rapid social change and have influenced culture and policies. It has been suggested that so far the baby boom phenomenon has been beneficial to OECD economies because they "swelled the ranks of productive workers, paying the taxes that support the young, the old, the sick and the unemployed" (Vanston, 1998, p. 1).

There is scant research on issues of future generations' work-retirement decision and its policy implications, including implications for unpaid work such as volunteering and caring. Further, existing studies of the retirement experience have largely been based on men's experience of retirement rather than women's (Onyx and Benton, 1995).

An ageing workforce requires fresh policies. In Australia, there are currently significant disincentives to continued part-time or self-employment for older workers, combined with ageism in the workplace. However, work after the traditional retirement age has the capacity to contribute to financial security in later life and the potential to add purpose and meaning to life.

This paper draws on a research project that was undertaken as part of a PhD thesis at La Trobe University, Melbourne. The focus was on Australian women of the baby boom generation, their working futures and the work-retirement decision. This was explored both from the viewpoint of women and from a social policy perspective. The research included focus group discussions, computer mediated communication (CMC) involving a Web site with four future scenarios for the year 2020 and the analysis of data from a large survey[1].

Women's views on prolonging working lives will be presented in this paper, followed by policy recommendations and concluding comments on the implications for women's working futures.

Women's voices

This section reports on the findings of the three studies in regard to a longer working life, women's unpaid work, retirement income, a work-life balance and planning for the future.

A longer working life

The women who participated in the focus group discussions reported a high level of stress in their lives and did not want to continue working past age 65 at their current pace. However, most of the professionals and managers, as well as some of the women in clerical and administrative positions were open to the possibility of undertaking part-time or project work, or a different type of paid work, past the age of 65. The women in low-skilled occupations agreed unanimously that the option of working beyond the age of 65 years was most unattractive. However, many of these women were looking forward to providing unpaid work in later life for their families and communities.

The preferred retirement age for approximately half of all baby boom women in the survey was between 55 and 59 years, although nearly one in ten wanted to work beyond the age of 64. The higher a woman's education level, the more likely she was to expect a later retirement. Further, the analysis of survey data by occupational status found the following statistically significant differences: the higher a woman's occupational status, the more likely she was to

work longer hours, have a preference to work less, have not enough spare time, and the less likely she was to regard her income as the primary motivation to work. Both studies (i.e. the focus groups and the survey) included women who had plans to change the type of their work in the future.

Despite the many negative aspects of contemporary workplaces, most women in the focus group discussions who commented on their paid work stated that they liked at least certain aspects of it. Many of the women who said that they worked mainly for financial reasons also remarked that they enjoyed the social aspects of their work – the social networks and the companionship with fellow workers.

The greater readiness of the women in the focus groups to consider work beyond the age of 65 years may be explained by the different methodologies. The survey used a questionnaire that provided the women with set categories for their answers. In contrast, the focus group discussions offered the opportunity to further explore issues in a discussion with other women.

Paid work has been considered as a "profoundly important source of social status and self-esteem" (Probert, 1998, p. 2). This research found that paid work seemingly provided women in professional, managerial and some women in clerical positions with a sense of fulfilment, control over their creative activity and contribution to the community. While women in low-skilled occupations were found not to be able to obtain these benefits from their paid work, they considered unpaid work as a meaningful and socially useful activity over which they had control. Consequently, it appears that some non-financial benefits derived from unpaid work by low-skilled women are similar to those gained by women in high-skilled occupations from paid work.

The nature of current workplaces was found to be of great concern to women. The participants in the focus group discussions and the CMC research commented on women's disadvantage in the workplace. In particular, they pointed to women's lower wages and reduced labour force participation and the implications for career options and retirement savings. Workplace changes over the last decade have reinforced this disadvantage. The casualisation of the workforce has affected women more than men, the experience of corporate downsizing has led to less job security, and workplaces were perceived as lacking flexibility to suit women's needs while at the same time employers increasingly expected flexibility from their employees. While some women reported that they had to work long hours, others were unable to find work, in particular those who tried to join the workforce after having taken time out to raise children or care for a partner. As a consequence, women felt time-deprived, rushed, pressured and stressed.

In all three studies, the participants reported that they had experienced or observed ageism in the workplace. Further, it was noted that older workers were less likely to have training opportunities than younger workers. Thus, older women are

affected by multiple inequalities in the workplace: as women and as older workers (Wilson, 2001). Being a member of a culturally and linguistically diverse community adds another disadvantage (Warburton *et al.*, 1995).

The research conducted for the three studies found that closely connected to women's views and planning regarding work in later life were other life considerations, in particular women's caring and volunteer work, their financial situation and a balance in their personal lives and in the environment.

Women's unpaid work

Many women reported that they looked forward to volunteering in retirement. One in three women in the survey expressed this intention, many focus group participants noted their plans for volunteering in later life, and participants in the CMC research anticipated an increased level of volunteering in the future. Women's motivation for providing unpaid work for their communities varied, including a concern for others, giving something back to the community, keeping busy and increasing social contact. The women perceived volunteer work as providing mental stimulation, purposeful activity, social contact and – unlike paid work – as having sufficient flexibility when combined with family responsibilities and other pursuits.

Unlike plans for paid work, the enthusiasm for future volunteering went across occupational backgrounds. An analysis of survey data showed that the women were more likely to look forward to volunteering in retirement if they were already volunteers, were in excellent health, and felt frequently happy. Financial security and occupational status had little impact on anticipations of volunteering in retirement, nor did birthplace, language spoken at home, marital status, or whether the women had dependent children.

Volunteer work fosters personal well-being (Thoits and Hewitt, 2001). Further, it has been noted that people with higher education levels and higher incomes have greater and more diverse social networks (Keupp *et al.*, 2000, p. 232). Therefore, volunteer work has potential benefits, in particular for women in low-skilled positions, as it may maintain and increase their well-being and social networks and counter isolation in later life.

In the context of volunteer work, the research participants raised two issues of concern. They were unsure whether in the future older people would be able to volunteer in areas of skill, and they requested some form of recognition for unpaid community and caring work. The latter concern has also been raised by Hugman (1999), who observed that in unpaid work for the benefit of family and community the actual tasks performed often resemble those for which other people are paid a wage and therefore should be recognised.

Caring is a type of unpaid work which is predominantly provided by women (Australian Bureau of Statistics, 2000), is usually associated with financial disadvantage for the carer (Gee *et al.*, 2002; Mitchell and Thompson, 2001), and may

have repercussions for the carer's health and well-being (Status of Women Canada, 1998). Not surprisingly, the women who participated in this research expressed concerns for the care of their ageing parents and other relatives. They found the required support services in short supply, and commented that governments had reduced entitlements and cut services such as nursing home care and carer support. Many of the women in the focus group discussions reported that they juggled paid work and caring responsibilities, which often left them exhausted and with insufficient free time. They anticipated that in the future the expectations on women's time from partners, children and older relatives would increase.

Retirement income

It has been argued (Khan, 1999) that among OECD countries Australia's retirement income system most closely resembles the three-pillar model favoured by the World Bank. Australia's retirement income system includes the age pension (first pillar), the compulsory superannuation guarantee system (second pillar) and voluntary savings or investments (third pillar). The age pension is a means tested flat rate payment which is provided as a safety net payment for men who are 65 years or older and for women who are 62.5 years or older. Since July 1997, the qualifying age for women has been progressively increased from 60 years by an additional six months every two years. This will continue until it reaches 65 in July 2013.

The age pension is funded from general taxation revenue and payment depends on residence in Australia (i.e. at least ten years continuous residency), not on previous labour force participation or individual contributions. The rate of the age pension is linked to wages growth and adjusted every six months in line with the Consumer Price Index. The Australian Government has legislated to maintain the single rate of pension at the indexation dates at a minimum of 25 percent of male total average weekly earnings, with flow-ons to the married rate of pension. The Department of Veterans' Affairs provides a similar payment to veterans, the service pension, which is available five years earlier than the age pension.

At present, Australia spends \$17 billion per year or 3 percent of GDP on the age pension. This is expected to rise to 4.5 percent of GDP by 2040 – well below the current level in many OECD countries today where public old age pension spending averages 7.5 percent (Barnes, 1999). The Australian system differs from that in most other countries because it emphasises poverty reduction over income replacement (Whiteford and Bond, 1999).

Few women who participated in the research were confident that they had or would accumulate sufficient savings for their retirement. The topic of superannuation came up in all eight focus groups, was discussed at length and was also raised by participants in the CMC research. The issues that were raised in regard to the superannuation

system were numerous and included the following main concerns:

- the superannuation system is too complex and too difficult to understand;
- the media and governments provide conflicting messages about the required savings for older age;
- the system is modelled on the male work experience and disadvantages women;
- some superannuation funds charge excessive fees;
- taxes on superannuation savings are too high; and
- financial advisers and fund managers are frequently perceived as biased and dishonest.

Of particular concern were the current policy shift in favour of savings in private superannuation schemes by neo-liberal governments and inadequate government regulation of the superannuation system. In this regard, the focus group participants expressed very clearly and unanimously that they wanted the government age pension to be maintained.

Work-life balance

Achieving a balance between work and other areas of life was found to be vital. The vast majority of participants in the focus group discussions stressed the importance of achieving a balance in life, and asserted that they were only prepared to continue working at an older age if a balance could be achieved between work and other areas of their lives, such as family, friends, study, volunteer work and time for themselves. The participants of the CMC research also regarded a work-life balance as essential, and some women visualised a post-materialist future and a more ethical society, suggesting spirituality and environmental sustainability as additional elements of a balanced life.

Many women commented on their plans to study, learn new skills or change career in future years. They emphasised the need for lifelong learning and free education and training if people were expected to prolong their working lives.

Will the women's voices be heard? Will women achieve greater equality and fairness in later life? Will we as a society overcome inequalities of gender and power? The participants in the CMC research did not consider the probable future desirable, and the women in the focus groups were rather pessimistic about the future.

Planning for the future

Most women who participated in the research had thought little about retirement, yet they reported that they worried about their financial situation in retirement. For example, nine in ten women in the survey were not confident about their financial future, in particular women who were divorced or separated. Only one in four women expected to be in a comfortable financial situation if she retired in ten years time.

Some women in the focus group discussions also pointed out that planning for later life was difficult because of a rapidly changing society, lack of understanding of financial and investment matters, or a changing family situation where

adult children moved back home or needed financial support. In particular, women in low-skilled occupations said that they found it difficult to plan ahead.

Policies and choices

Policies for an ageing female workforce should be based on the values of inclusiveness, fairness, self-determination and social justice. Choice is important to baby boomers, and social policy of the future will need to consider a wide range of options across all spheres of life. Further, social policy will have to take account of women's multiple roles, for example, as workers, mothers, daughters, grandmothers, partners in a couple relationship, friends, carers, citizens, and as individuals who want to achieve a balance in their lives and align their work with their values. Inclusive processes of consultation and citizen participation in the policy development processes are crucial.

The policy recommendations resulting from this study are concerned with change in three areas: prolonging working lives, improving income systems and achieving a balanced life.

Prolonging working lives

Prolonged working lives should be a choice. Equality in the workplace and favourable working and tax conditions might influence the work and retirement decisions of those who consider staying in paid employment past the age of 65 years. Tax incentives should also be used to persuade employers to recruit and maintain an age-balanced workforce.

More flexible workplaces to achieve a better work-life balance are important for the whole workforce, not just for women. However, flexibility at work is essential if mature female workers are to be encouraged to prolong their working lives.

Increased opportunities for skills development are required if older employees are expected to stay in the workforce for longer. Further, the topic of prolonging working lives needs to be brought into mainstream social and economic debate, with people from a diverse range of backgrounds given opportunities to contribute to such a discourse.

Government regulation should seek to achieve protection for particularly disadvantaged groups of older women, such as those in ill health, with few financial resources and/or no significant social networks.

Those women who do not wish or are not able to be in paid employment beyond the age of 65 years often provide unpaid work for the benefit of their families and communities. Such unpaid work needs to be encouraged and supported to a much greater extent than at present. Additional opportunities for involvement in community work that take women's interests, skills and experience into account are required, together with a culture of recognition. A culture of recognition should encompass the provision of training and

material, human and financial resources, and should make civil activities more visible. However, the provision of community work should not be a requirement for access to government income support.

Government-funded superannuation contributions should be provided to people who provide unpaid personal care work. Further, better supports, for example, increased availability of respite care, should be available for people with caring responsibilities.

Improving income systems

At present, Australia operates a highly targeted and punitive social security system. More than one in five Australians of working age rely on this system for income support, most of these for the majority of their income (Commonwealth Department of Family and Community Services, 2002). It is likely that this proportion will increase in the future. Therefore, it is proposed that a system be explored that would provide a guaranteed minimum income (citizens income) for all Australians. A basic income would be above the poverty line, without means test or work requirement, and available to all Australians. A range of different models exists already (e.g. Tomlinson, 2001; Beck, 2000a; Van Parijs, 2000), and an exploration should focus on a suitable model for Australian circumstances. Coinciding with such an exploration should be a gradual simplification of social welfare benefits and a public discourse about all aspects of a future minimum income system.

Community education about financial planning and investment products should be increased. Governments should fund not-for-profit organisations for the provision of financial advice that is independent, honest and easy to understand. Further, the Australian superannuation system should be improved to eradicate inequities. In particular, this should include recognition of time out of the workforce for family reasons or study, increased transparency of financial transactions, removal of the \$450 earnings threshold and front-end taxes, extension of the government co-contribution concept to people who provide unpaid caring work, legislation for full compensation in the event of theft or fraud, taxation concessions for people who postpone withdrawing superannuation savings, equal treatment of same-sex partners and heterosexual couples in all Australian States and Territories and broader representation of women in decision-making positions across all sectors of superannuation

Achieving a balanced life

Achieving a balanced life requires attention to ecological, social and spiritual sustainability. Ecological and spiritual issues were mentioned by a small number of research participants, but not explored in this study. However, elements of social sustainability were examined. These include health, lifelong learning and the development of social capital.

Australia's universal public health system (Medicare) should be maintained and strengthened, healthy ageing should be promoted and access to private health care for older people should be made more affordable.

Opportunities for lifelong learning should be increased and diversified, and free training and education should be available to people of all ages. The development of social capital should be encouraged and supported by strategies such as the provision of mentoring programs, opportunities and technologies for communication within the community, and increased availability of communal spaces and systems that support community relationships.

Conclusion and implications for women's working futures

This paper reported on a project exploring the working futures and issues that are likely to influence the future work-retirement decisions of Australian women of the baby boom generation. The pertinent areas associated with this decision include the nature of future workplaces, support for unpaid caring and community work, the retirement income system and a work-life balance. Many of these issues are similar in other OECD countries.

While population ageing is frequently discussed in the media and among policy makers as representing a crisis for industrialised countries (Burtless, 2002; Peterson, 1999), it has been argued that an ageing population is unlikely to create significant future problems in Australia (Gibson and Goss, 1999; Kinnear, 2001). The expenditure on public pensions in Australia is expected to rise from currently 3 percent of GDP to 4.5 percent of GDP in 2040 (Barnes, 1999). It is already much higher in most OECD countries where public old age pension spending averages 7.5 percent (OECD, 2001, p. 151).

Expected changes in the age dependency ratio are sometimes raised as an issue of concern. The age dependency ratio is the share of those aged 65 and over to those aged between 18 (or 15, in some calculations) and 64. In Australia, it has been projected to grow from approximately 20 percent currently to close to 40 percent by 2051. Most of this increase is expected to occur between 2010 and 2030 (Walker, 1996). Similar increases are expected for other OECD countries (OECD, 2001, p. 147; Carey, 2002). Some OECD countries, for example Austria, Germany, Italy, Finland, Spain and Sweden, already have dependency ratios of approximately 30 percent (Carey, 2002, p. 9). Concerns about the changing age dependency ratio focus on the question of whether a smaller proportion of taxpayers will be able to provide sufficient financial support to an increasing population of people who have retired from the workforce.

In his recent work, Beck (2000b, p. 214) emphasised that it is cultural perception and definition that constitutes risk, and that:

believed risks are the whip used to keep the present-day moving along at a gallop. The more threatening the shadows that fall on the present day from a terrible future looming in the distance, the more compelling the shock that can be provoked by dramatizing risk today (Beck, 2000b).

In this way, the “ageing-population-crisis” discourse can be used by governments, the media, insurance and finance companies for their own purposes. For example, it has been suggested that the crisis rhetoric associated with population ageing has been exploited by neo-liberal governments to promote privatisation of pensions (Street and Ginn, 2001).

In contrast, population ageing should inspire us to engage in a discourse about better futures and new stories in regard to older women’s (paid and unpaid) work, about equity, partnership and ageing as a resource. These new stories require social policies that seek to achieve

- more flexible workplaces;
- the choice – not the compulsion – to opt for a longer working life;
- equality in the workforce for women and men, young and older people;
- opportunities to engage in paid and unpaid work;
- recognition for unpaid community and caring work;
- better supports for women with caring responsibilities;
- opportunities for lifelong learning;
- the eradication of inequities in retirement income systems;
- broad access to information about financial planning;
- protection for particularly disadvantaged groups of older women, such as those in ill health, with few financial resources and/or no significant social networks;
- consideration of people with post-materialist values;
- environmental sustainability;
- healthy ageing; and
- the availability of public pensions as a safety net payment or, preferably, a guaranteed minimum income as a citizens income for people of all ages.

Further, income and pension systems of the future will need to be uncoupled from assumptions about continuous participation in paid work and instead reflect the diversity of socially useful paid and unpaid work that is provided by individuals throughout their lives.

The implementation of such policies requires visional political, business and community leadership, and involves all levels of government, employer organisations, unions and community leaders. An inclusive process of consultation and citizen participation in the decision making process is crucial.

Note

- 1 Further information about the methods used for the three studies is available at: <http://member.melbpc.org.au/~monika/research.html>

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Ageing: a personal futures perspective

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Keywords Life planning, Personal needs

Abstract Futures research is commonly reported on the macro scale, and involves analysis of a global or national situation with a long-range view of trends and alternative futures. This article approaches ageing and the future from the micro scale, examining the future one life at a time; suggesting that futures methodology can, and should, be effectively applied to individual lives. Three propositions relating to development of personal futures are introduced, focusing on life stages, personal trends and life events after age 60. These three elements of life are then shown as a framework on which individuals can build personal scenarios and create personal strategic plans for the stages of life after age 60.

Introduction

Planning and preparing for the future is an important part of successful business practice, but is often overlooked in personal lives, particularly in the later part of life. The research on which this paper is based is focused on revealing the systems and trends that are a part of life after age 60. Understanding these systems and trends of later life can help people of all ages be more aware of the lives of parents, co-workers and friends, and to prepare for their own lives after 60.

At the present, developing personal scenarios or a personal strategic plan can be nearly as complex as conducting the same research for a business organization, which may explain why the entire area of personal futures has languished and failed to develop. During the past several years, the goal of my research has been to simplify the exploration of personal futures to the level that individuals can participate in developing their own personal scenarios and strategic plans, either under the guidance of a futurist/facilitator or on their own. As a result, my research took two directions:

(1) the development of a framework of foreknowns that provides guidance to personal futures based on what is already known and on which an individual can build; and

(2) the simplification and codification of two futures methods, scenario development and strategic planning.

Thus a model for developing personal futures would be represented as shown in Figure 1.

Each stage of this model will be discussed below along with three propositions developed during my research. Although much of the information presented here is applicable to all ages of life, this article will focus on life and personal futures after age 60.

A framework for personal futures

Jouvenel spoke frequently of "foreknowns" in his book *The Art of Conjecture* (Jouvenel, 1967). The concept presented here, a framework for personal futures, seeks to identify the foreknowns and probabilities of human life after age 60, then combine that framework with personal information, preferences and desires in order to explore personal alternative futures.

One example of the value of understanding foreknowns can be found in the very successful book *The Common Sense Book of Baby and Child Care*, by Dr Benjamin Spock (Spock, 1946). This book explained to parents what they could anticipate as their children grew from stage to stage, then identified events that were normal or to be expected at various ages. The book was revolutionary for its time, because Dr Spock was able to help parents understand their children's futures, based on the stages and events previously experienced by many other children. Similarly, people of all ages pass through predictable stages of life and

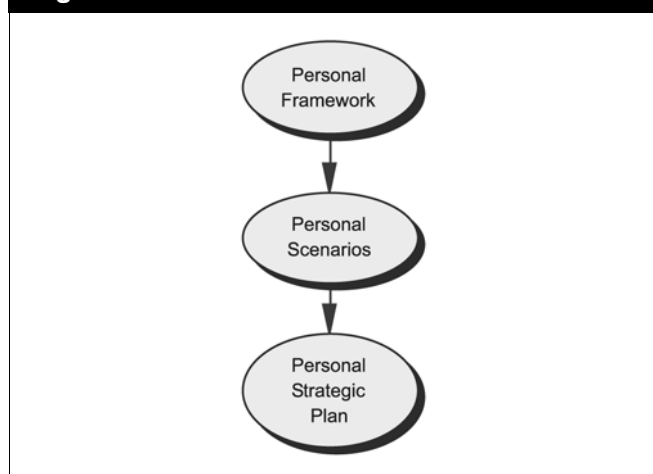


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Figure 1 — Personal futures model



experience common events related to those stages. Understanding those stages can provide clues to personal futures, whether an individual wishes to understand his or her own futures or the stages and events that parents, family members, co-workers and friends are facing.

For all of these reasons, the framework for personal futures proposed here includes not only life stages and life events, but also introduces a third component, life trends. Each of these components is discussed and described below.

Life stages

The concept that life is divided into stages dates back at least to the time of Hippocrates (Opsopaus, 1995) and the stages defined by the Ericksons (Erikson *et al.*, 1986) are still a pillar of developmental psychology (Krebs-Carter, 2000). The value of life stages to personal futures lies in the progression through the stages of the life cycle, which provides a map of the stages yet to come. Unfortunately, historic life stages were developed in a time of shorter lives, and all of life after age 60 was considered to be one stage, as shown in Figure 2.

This representation of life stages was realistic when average life expectancy at birth in the USA was 47.3 years in 1900 or 68.2 years in 1950 (National Center for Health Statistics, 1992). Now, people are living active lives for decades beyond retirement age, which necessitated a new approach to stages after age 60. Research into the literature of the fields of geriatric medicine and gerontology suggested a proposition for life stages after age 60 that appeared to be appropriate for personal futures research:

Figure 2 — A composite of historical stages of life

Infant	Child	Pre-teen	Teen	Young adult	Adult	Middle age	Old age
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P1. There are four potential stages of life after age 60.

These stages are not related to chronological age; not everyone goes through every stage; it is possible to skip one or more stages and it is possible to return from a later stage to an earlier stage.

To identify the proposed stages, I applied descriptive terms that are in common usage in geriatric medicine, then suggested boundaries that would define the end of one stage or the beginning of another. The stages and a brief description are:

- *Independent stage.* In this stage of life, the individual is able to manage all aspects of life and is capable of living independently.
- *Vulnerable stage.* In this stage, the individual needs some help with the "instrumental activities of daily living" (using telephones; using transportation; shopping; preparing meals; housework; taking medicines; managing money) (Reuben, *et al.*, 2000, p.147) and may live at home or in an assisted living facility.
- *Dependent stage.* In this stage, the individual is physically dependent on others for care, typically unable to perform two or more of the "activities of daily living" (bathing; dressing; personal grooming; toileting; continence; transferring in and out of bed or chair) (Reuben *et al.*, 2000, p. 146) and may live at home, in an assisted living facility or in a nursing home, depending somewhat on the person's mobility.
- *End of life stage.* Typically begins with a terminal diagnosis or a determination that the individual is in the final stage of a slow moving disease such as Parkinson's or Alzheimer's. This stage is frequently considered the last six months of life.

In order to determine the validity of this proposition, I first considered a Delphi survey of experts, thinking of experts in geriatric medicine and gerontology. After some discussion with individuals in these fields, I determined that for the purposes of studying personal futures, the true experts with the broadest view were the people who were living in these stages of life. Consequently, I conducted a survey of people over age 60 who were living in these stages themselves and had friends and family members who were, or had been in other stages. The 186 respondents to the primary survey, ranging in age from 60 to 94, were strongly supportive of this proposition.

Based on the results of this portion of the research, life stages could now be viewed as including four stages of life after age 60 as shown in Figure 3.

Thus, life stages provide clues as to what lies ahead in life and a basis on which to begin planning for personal futures. The stages with which we will be concerned here are the four stages that normally occur after age 60, which replace one stage formerly called old age.

Figure 3 — A table of life stages updated to include four life stages beyond age 60

Infant	Child	Pre-teen	Teen	Young adult	Adult	Middle age	Independent	Vulnerable	Dependent	End of life
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Life trends

Whereas, in an illustration, the lines dividing the stages of life would intersect the life timeline, lifelong trends parallel the lifeline. The concept that there are trends that continue through an individual's life from beginning to end was not found in literature that I surveyed, but emerged slowly during the course of the research until the trends became obvious, leading to a proposition:

- P2. Trends exist within the lives of each person that are present from the beginning of life to the end and are common to the lives of all people.

This concept of trends in life may be hard for some to accept at first, but a definition accepted by most futurists is that "a trend is a long-term change over time" (Bishop, 2002). As will be shown, each of the discussed trends suggests a graph line that extends from birth to the end of life and tracks important changes throughout life. Six trends that were identified during my research include:

- (1) *Activities*. Includes education, work, sports, hobbies, travel and other personal activities.
- (2) *Finances*. Everything related to personal finances; income, expenses, assets, liabilities, insurance.
- (3) *Health*. Personal health, physical and mental fitness, nutrition, health care, medications, personal care.
- (4) *Housing*. Includes the home or facility in which an individual resides as well as the community or area in which the home is located.
- (5) *Social*. Family, friends and people with whom an individual has relationships.
- (6) *Transportation*. All means of transportation including walking, public transport and private vehicles. In later stages, walkers, wheelchairs and scooters become components of transportation.

In the early part of my research, I began tracking and categorizing common life events that could be correlated to age, such as starting a career or retirement from work. Some of the events were directly associated with others and could be visualized as forming a line, when diagrammed, parallel to the lifeline. The lines formed by related events expanded into trajectories, such as careers, education, and sports. For example, starting a career and retirement are events, but would only be two events within a trajectory, as the trajectory would include all of a person's employment or career. Following the constant comparative method (Glaser and Strauss, 1967), the trajectories were grouped into categories. One category that included education, work, sports,

hobbies, travel and other personal activities was labeled "activities."

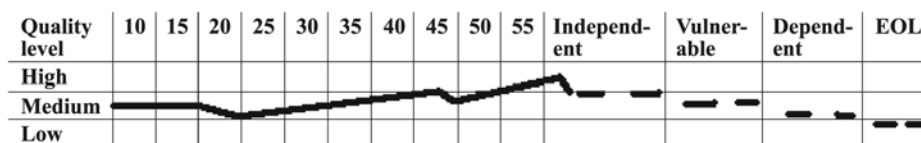
Activities continue throughout life, at varying levels of importance and success. For many, success in education is a motivating or driving force in life, or a driver. The same is true of careers. Even retirement can be a force driving change at certain times of life. It was at the point where several categories had emerged that I realized that some of these categories constituted life trends.

Another life trend, finances, provides an example that lends itself to visualization as a graph line through life, if only because we are familiar with financial numbers being illustrated in graphic form. As an infant, as a child and often into young adulthood, the parents meet an individual's financial needs or responsibilities and the graph line reflects the parent's resources during those years. As the individual becomes an adult and takes financial responsibility, either alone or with a spouse, the graph line changes, reflecting the varied fortunes of the individual. Very importantly, finances are a driving or motivating force at various times in life.

Similarly, personal health, social relationships, housing and transportation can be seen as life trends and, at varying times, driving forces in an individual's life. Critical to this process of exploring life trends, driving forces and alternative futures is codification, that is, reducing each of these elements to simple terms that can be easily understood and supplemented with personal information in worksheets. Codification allows information to be collected in a useful form that will lead to the future. For example, a simple graph can be constructed by any individual for each of the life trends utilizing a worksheet that allows the individual to provide information in terms that are relative to his or her own life experience. Following is a simple form on which an individual can create a lifetime graph of personal finances or any personal trend. The graph can illustrate the past and present and can be projected into the future.

In the example of a worksheet graph of a personal trend shown in Figure 4, the numbers across the top represent ages before 60. To create the graph, the user would make a dot in each column representing the quality level of the personal trend, indicated in the left axis, up to his or her present age, then connect the dots to make a trend line. In the first few columns, the level would usually represent the quality level for that trend provided by parents. From the person's present age, a dashed line would represent anticipated levels for the future. The completed table provides an example of an individual trend line derived from a worksheet.

Figure 4 — An example of a graphed personal trend



Obviously, the descriptive terms for quality level of a trend, high, medium and low shown in the illustration are relative terms and their interpretations may vary from individual to individual. What is important here is the creation of a graph that is representative of this individual's life to this individual. Similar graphs can be prepared for each life trend, providing a picture of the individual's view of life quality, showing the direction of the trend lines at the time they are drawn and indicating the individual's expectation of each trend in the future. These trends can be valuable to the scenario building process and illustrate the benefits of categorizing and codifying personal information.

For an individual trying to plan for life after age 60, these trend lines are critical to the planning process as well as to the development of alternative scenarios. In most cases, people cannot expect any of these trends to improve substantially after age 60, and with each succeeding stage, some trends are likely to decline. This suggests that wherever an individual has the opportunity to raise the trend lines, it is strategic to do so.

Life events

Throughout life, important events occur. Some events are life changing or turning point events, some events are intentional (Tough, 1982) and some have very high impacts (Holmes and Rahe, 1967). Other events may simply be milestones, but important to this research is the fact that many events can be anticipated or related to a stage of life.

Many events and their related chronological ages are considered common knowledge, although with some variations between cultures and countries:

Young people graduate from high school in their late teens. Those who graduate from college are usually in their early 20s. Marriage and the beginning of a family usually occur in the 20s, as does the start of a career. Middle age brings the peak earning years, the end of child bearing for women and the process of children leaving home to start their own families. Retirement usually occurs in the 60s, often accompanied by relocation to a new home, travel and leisure activities. Parents and friends die or have serious health problems. As individuals, we experience health problems as we and our friends grow older. Grandchildren and great grandchildren arrive along the way. Eventually, we will reach the end of life.

These observations in the literature and in life led to a third proposition:

P3. Some events in life can be anticipated, both as to their likelihood of occurring and to the stage of life in which they will occur.

When asked about the best events in their lives after age 60, 186 people over age 60 responding to my survey mentioned, in order: travel, retirement, moving to new homes, time with friends and family, discretionary time and grandchildren as among the most important events. When asked about worst events, they listed personal illness, death of a spouse, deaths of family and friends, and spouse's illness, in that order. Although older people have experienced the deaths of family and friends and may be prepared for their own death, the death of a spouse has a greater impact on the surviving spouse than nearly any other event in life (Miller and Rahe, 1997).

Life events, although not precisely predictable can be anticipated and are valuable elements in considering scenarios. Where life stages and life trends can offer some stability or direction to scenario planning, life events introduce the good, the bad and the wild card elements that shape personal futures.

The framework – after age 60

Life stages, life trends and life events can be visualized as a framework for life, on which the past can be displayed and at least a portion of the future can be projected. Such a framework can be illustrated as a matrix composed of stages across the top and life trends vertically. Major life events can then be added into the open cells of the matrix for past stages, the present stage and for futures stages. The matrix, shown in Figure 5, can be expanded to include many events and considerable detail for both the past and the future.

It is worthwhile to remember when looking at this matrix that the transition between any two stages may produce an enormous change in an individual's life. For the individual

Figure 5 — Matrix of foreknowns after age 60

	Independent stage	Vulnerable stage	Dependent stage	End of life stage
Finance				
Health				
Activities				
Social				
Housing				
Transportation				

who has suffered a serious stroke and has gone from the independent stage to the dependent stage in a few hours, the event is crushing. The same may be true for the apparently healthy individual who receives a terminal diagnosis. Foresight of the possibility of such events may not change the event, but it may change the individual's response and improve the ability to cope with such events. Even events that appear small to an observer, such as losing the ability to drive, can have substantial effects on the affected individual who does not anticipate and is therefore unprepared for the event.

On the other hand, an individual who has foreknowledge of the possibilities of a stroke and puts effort into recovery may recover more fully than the individual who reacts in surprise, grief and anger to the event. Similarly, the individual who has prepared to deal with the events surrounding the end of life has fewer concerns, unanticipated crises or untended personal matters to cope with in the last days of life.

Some examples of common events that can be anticipated during specific stages of life are shown in Tables I-IV. Events will vary some with culture and economic status. The events listed do not apply to everyone, but are frequently mentioned both in literature and research:

Personal planning for the last three stages of life is best done either before or during the independent stage, as

Table I — Events that might occur during the vulnerable stage

	Independent stage
Finance	Retirement; changes in insurance; changes in income and expenses
Health	Changes in health and appearance; health events; medications; chronic illness; fitness becomes important
Activities	Travel; increased discretionary time; hobbies; sports
Social	Changes in social circles; grandchildren; deaths of friends; more time with family and friends: caregiver
Housing	Move to different home; move to different area; home modifications
Transportation	Changes in driving needs; stop driving; alternate transportation; car-pooling

Table II — Events that might occur during the independent stage

	Vulnerable stage
Finance	May not be able to manage finances
Health	Serious condition; multiple conditions; multiple medications
Activities	Reduced activities
Social	Reduced interaction
Housing	At home if care available; assisted living
Transportation	Rely on friends; public transport; wheelchair; walker

Table III — Events that might occur during the dependent stage

	Dependent stage
Finance	May not be able to manage finances; eligible for long term care insurance benefits (U.S.)
Health	Dependent on others for assistance with daily activities.
Activities	Limited; passive activities
Social	Shrinking social circles; reduced access to friends and family
Housing	At home if care available; nursing home
Transportation	Wheelchair; walker; scooter; rely on friends; public transport

Table IV — Events that might occur during the end of life stage

	End of life stage
Finance	Managed by others
Health	Pain management; receive care; hospice
Activities	Passive activities; medical appointments
Social	Limited to closest friends and family
Housing	Care at home; nursing home; hospice; hospital
Transportation	Ambulance; wheelchair; walker; scooter; rely on friends; public transport

people in the last three stages of life may not be capable of planning or making important and critical decisions. If the individual has not made plans and provided clear instructions, others will be forced to take over and impose decisions and plans that may or may not coincide with the wishes and desires of the individual. A common example might be a situation where an individual prefers no heroic measures such as resuscitation if death appears imminent, but the family may prefer to try every possible means of extending life. If the individual has not left clear instructions to physicians, the family's decisions will prevail.

In practice, the framework will be supplemented by considerable personal information, including the personal trend-lines, preferences in housing and care, descriptions of social circles and the status of existing plans. With the framework complete, the individual is in a position to apply futures methods to explore and prepare for the future.

Applying futures methods to personal futures

Having developed a framework of foreknowns composed of stages, trends and events is an important start, but the systematic application of futures methods is critical to making the framework information useful. The first step toward understanding one's life after age 60 is to explore the possible futures for each stage of life. Why each stage? Everything about life, including personal perspective, can

change when a person makes a transition between two stages of later life. Thus, planning for the independent stage when a person is in control of his or her life is very different from planning for any of the following stages.

The two futures methods that are considered here seem both appropriate and adaptable to personal future. Scenario development shows the individual some possibilities for the future and strategic planning helps the individual develop strategies and plans for enjoying or coping with those futures.

Simplification and codification will be critical to the successful development of personal futures. As Bell states “some methods are more codified than others and the average person, thus, can be taught to use them . . .” (Bell, 1997, p. 241). Futurists and facilitators who work with groups of individuals in the exploration of personal futures will benefit greatly from the use of well designed worksheets and simplified versions of futures methods.

Personal scenarios

The purpose of developing personal scenarios is to explore plausible, probable and preferable futures. Scenarios provide views of the future and suggest the futures for which one should plan, but do not offer any strategies or actions an individual should take to deal with those futures. Strategies and action plans are considered in personal strategic planning.

Stages of life define the future time period for a set of scenarios. In macro futures, time periods may be ten, 50 or more years in the future, but in personal futures, chronologic time is flexible and less relevant. The critical time periods are framed by the stages of life and in each transition to a later stage.

Personal trends provide the drivers for the personal scenarios. Finances and health will probably be important throughout all stages, but housing becomes very important when a person needs long-term care. Decisions arise as to where care should be provided, whether at home, assisted living, a nursing home or other option and finances often influence the choices. Access to family and friends, the social trend, is also an important consideration in long-term care. Many of these decisions are not only personal but also difficult, again pointing out the value of making as many personal decisions in advance, while still healthy and not under the emotional pressures of a crisis.

Events fill out the scenarios, and after age 60 undesirable events related to health must be considered as possible events. No one plans to have a stroke, heart attack, cancer, Alzheimer's disease or even arthritis, but all of these diseases correlate with increasing age, so the individual's health history or susceptibility to any disease or condition should be considered in constructing scenarios and the possibilities of disease must be assumed.

Development of personal scenarios will benefit greatly from the use of carefully designed worksheets, diagrams and simple approaches to scenario building. The fixed matrix method, producing four scenarios (Bezold *et al.*, 1998) simple and understandable to the average person. In presentations and workshops I have found that older audiences readily identify with four archetype futures:

- (1) probable future;
- (2) best plausible future;
- (3) worst plausible future; and
- (4) “wild card” future.

There is an emphasis here on “plausible” rather than possible futures, and the trend lines will often indicate what is plausible and what is not.

After completing a set of scenarios for the independent stage, a complete set of scenarios should then be created for each of the succeeding stages, a total of 16 scenarios.

This view of an individual's scenarios across four stages, shown in Figure 6, demonstrates the relationships between scenarios and life stages. Individuals should understand that when they make a transition between stages, they may also change to any of the four futures in that stage, or to a future they have not anticipated. After individuals have completed mapping their alternative futures, they can then proceed to the next step, personal strategic planning.

Personal strategic planning

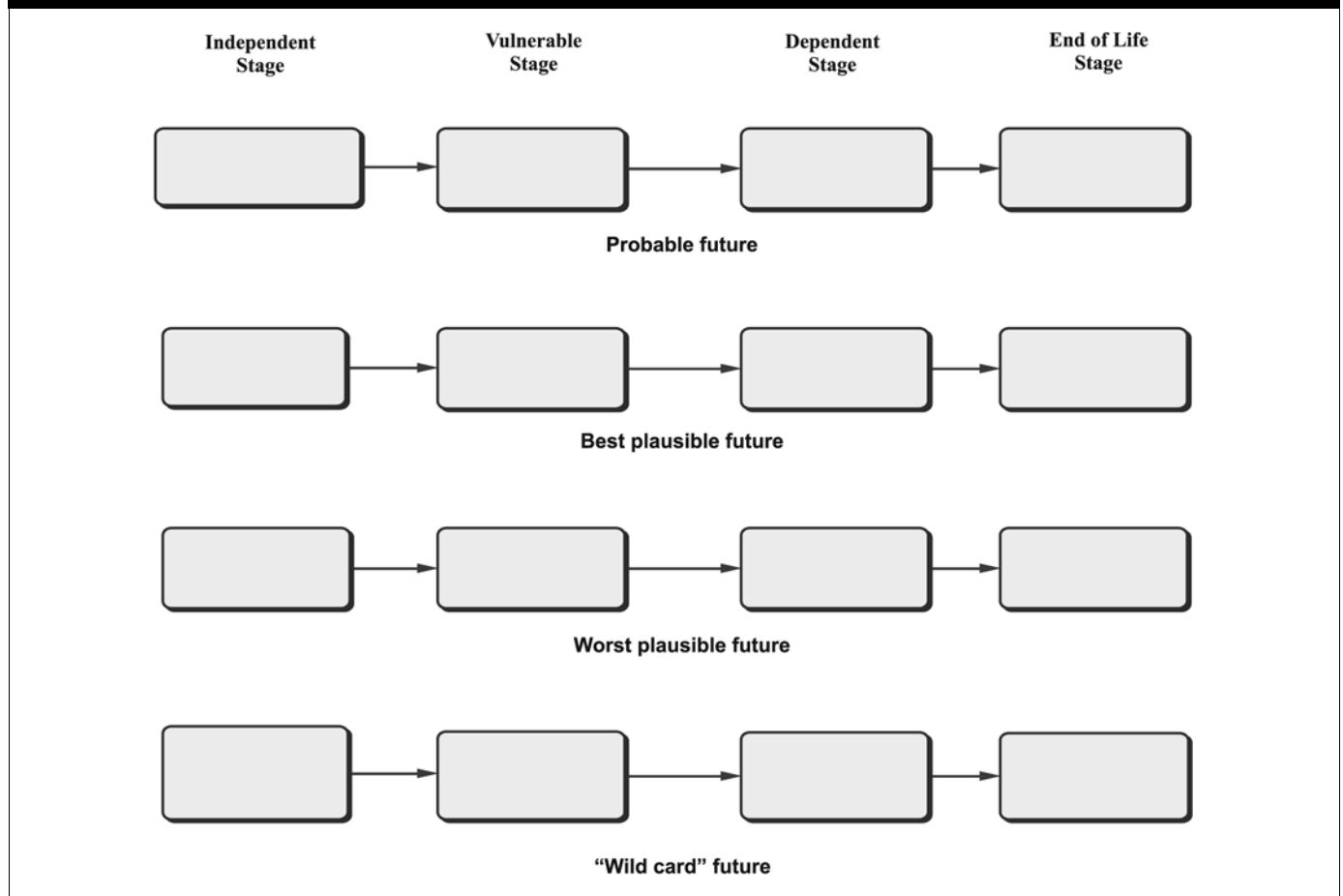
Strategic planning for a business is a complex process, largely because of the numbers of people who must be involved as stakeholders and decision makers. Personal strategic planning involves a small number of stakeholders and only one or two decision makers, greatly simplifying the task of developing a strategic plan. In the model proposed here, by the time an individual begins personal strategic planning, he or she has already prepared a personal framework, developed a set of scenarios and is invested in the process. Consequently, an individual, provided the proper tools and guidance can complete an initial strategic plan in a relatively short time and enjoy substantial benefits for the effort.

Again, as demonstrated by Morrissey (1992) simplification and codification are key elements in allowing individuals to develop strategic plans. The purpose of this paper does not include exploring or defining strategic planning methods, but is to illustrate that strategic planning is both possible and beneficial at a personal level.

Visioning

Visions of personal futures can range from complex to as simple as “play golf every day of my life”. An individual may prepare a vision for each stage of life or may prefer one broad vision that covers all stages. Morrissey (1992) recommends that the starting point for creating a personal vision is an examination and ranking of personal values.

Figure 6 — Map of scenarios for each of the four stages of life after age 60



Personal missions may also be complex or simple. Many people are concerned about their spouse or any family that survives them and focus on providing for their needs. Some wish to help others, make a mark in the world or simply wish to be well remembered. Others will express specific desires to end their lives peacefully, at home, with family or friends. The point is simple, that the vision of any individual's future must satisfy only the needs of that individual.

Strategies

Scenarios provide a strong base for developing personal strategies, but it is up to individuals to consider personal desires and confront difficult questions, closing gaps between desires and realities. Good strategies can lead to achieving a preferred future or to avoiding an undesirable future. One of the most important strategies is the selection of a personal representative, whether spouse, child, friend or professional who, when needed, will protect both the individual's interests and quality of life.

If ... /then ... strategies are easily understood and provide an opportunity to present difficult questions in worksheet form that the individual can consider privately, yet join in discussion with others who are considering the same

questions. For each potential situation, the individual should consider the impact of the event on personal life trends (activities, finances, health, housing, social, transportation)

Examples of situations that could require strategies include:

If ... you require long-term care

Then ... (where? who? how?)

If ... your spouse dies

Then ...

If ... you receive a terminal diagnosis

Then ...

If ... you (and your spouse) are unable to manage finances

Then ...

These questions help people to face questions that they tend to avoid, and when in a group have the opportunity to voice concerns and hear other people's strategies.

Action planning

In addition to If ... /then ... strategies, individuals can consider strategies and actions to achieve desired results (preferred futures) or to avoid undesirable futures. For example, an individual may stop smoking to avoid cancer or

cardiovascular problems; start exercising to improve HDL ratio (cardiovascular) or to avoid frailty; have regular health screenings (blood lipids, mammogram, colonoscopy, and others) to avoid a variety of medical problems. The value of a strategic plan for older individuals is the same as it is for an organization, it provides a clear sense of direction and a set of actions that can be taken to achieve a preferred future, avoid or mitigate the effects of an undesirable future or prepare to deal with future events.

Implementation

The final step in any strategic planning exercise is implementation. In business, it is unfortunately common for strategic planning projects to be conducted and completed, but never implemented (Markley, 1991; Block, 1981). Once again, an important difference here is that an individual who has undergone this exercise in planning for his or her own future is substantially invested in the result. In addition, the collected information, the concepts and the decisions are now part of the individual's knowledge and will very likely affect the individual's thinking processes for years to come, whether or not the strategic plan is precisely followed.

Future workshops

An additional futures method that appears to be applicable to personal futures is the future workshop, developed by Jungk ((Jungk and Mullert, 1987) to encourage people to participate in the futures of their communities. Applying this concept to personal futures would allow individuals to explore personal futures as a group under the guidance of a workshop facilitator.

One benefit of a codified framework approach is that a great deal of information can be prepared by each individual prior to the workshop through the use of worksheets or a workbook. If each individual is prepared with his or her own personal information and some preferences, the workshop can proceed quickly to those areas in which the group has mutual interests and concerns.

A key factor in successful outcomes of a personal futures workshop is a knowledgeable leader or facilitator, which implies that people with training in Foresight and Futures Studies would be logical candidates to lead workshops.

Conclusion

The goal of my research and of this paper is to begin the process of making personal futures methods and techniques available to individuals who can benefit from their use, starting with people over the age of 60. For older people, an understanding of plausible futures offers an opportunity for early decision making that can reduce the impacts of crises when they occur and allows the individual to retain some control over how life plays out even when he or she is no longer in a position to make those decisions.

The three propositions that have been introduced here provide a theoretical structure that combines foreknowns with

personal information, aspirations and preferences for the future to create a personal framework. This framework contains the trends that drive personal direction and are the basis of personal scenarios. In turn, the scenarios for the future stages of life are the basis for personal strategic planning.

Further research and development of personal futures will be required, including:

- the expansion of the framework to cover all stages of life;
- the simplification of futures methods for the development of personal futures;
- the development and testing of worksheets and illustrations to guide individuals in the development of personal futures; and
- design and testing of workshop formats and teaching tools.

Work has begun and will continue in each of these areas.

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Liberating imagination about ageing

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Abstract *We are in the midst of a positive ageing revolution and a revolution in the workplace as well. We've been given a whole extra generation of life to use in a new way. How shall we take advantage of this gift of nature to evolve the human species? Might the purpose of increased longevity be to mature enough to express our untapped potential for building a new and better world?*

When I was 13, an inspired ancient history teacher, asked us to spend a month designing an imaginary continent and writing its history. We had to decide who lived there and how they got along. We had to imagine how the continent was settled, how conflicts were resolved, how people created meaning, order, and purpose in community through governance structures and religion, how they organized commerce, what and how they spoke to one another. In short, we had to understand, imagine and create the human enterprise in a place. All of this was brought to life through a set of colored maps we created which showed how the continent changed over time. It was a powerful and invigorating activity.

What mythical maps about "The Land of Positive Ageing" govern our government's policies, our own hopes and fears, how we look in the mirror, how we produce goods and services? Think of how you draw the maps of ageing . . . What images have authority in you? What do you love and fear about it? How have your images of ageing changed over time?

When I was five, "the Land of the Old" was defined by stories and storytellers, musty like my music teacher's home which was full of hard couches and soft pussy willows. It was full of people like my grandmother and babysitter who wore hair nets and liked things a certain way and shuddered when

I climbed the tree in our front yard. At age 20, reading TS Eliot's *Four Quartets* expanded my ageing map – there ageing swarmed with the mystery of life, and was subject to sudden storms and long droughts and unexpected insights. It was a land where life lost its illusions and plunged into paradox, a land of clear seeing followed by dust storms and waiting in which no way forward could be discerned. More recently, working in low-income communities in Chicago, I have come to recognize ageing as no longer a land separated from youth, by necessity and hardship; many grandmothers and grandfathers are raising a second generation of children because the middle generation has been lost to drugs or other premature death. Grandparents and great grandparents are prayer warriors and crime stoppers, who sit in their rocking chairs and watch vigilantly out of their front windows for trouble, protecting neighborhoods with their prayers, eyes and ears, attentive to forces that threaten the peace and security of the community, calling police before danger gains a foothold.

Much of our discourse and media commentary about the extra generation of life has been trapped in disparaging ageism. Biology and economics anchor our basic Western model; we are more in the habit of consuming images than of creating them. Many of the images of age we have been fed are of the Land of the Old as overpopulated and full of unproductive people afflicted with inescapable physical and mental handicaps.

As Yogi Berra said, "the Future isn't what it once was," but it can be full of life and purpose. We have a whole new generation of life to live. How do we keep ourselves awake to

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the possibilities of our lives as we age so the future and not only the past stay on our mental map?

One way is to look for examples of lives that have successfully claimed ageing's discovery and promise. They abound in my immediate family so I will use them as vivid examples of a new era in ageing which has been underrepresented. My father is 91. For 40 years, he worked for the same company until mandatory retirement age, which he reached 30 years ago. Since then he has developed three major new careers, the latter in China, in both a new country and new field for him. Last year he flew from Chicago to China four times to help my younger brother with a new concrete block business they started there seven or eight years ago. When asked why he created such a time-consuming and high-risk venture abroad so late in life, he says it's fascinating and he hopes it will benefit his great grandchildren, as yet unborn. He often introduces my mother, to whom he has been married for 59 years, as his "current wife." Last year at his 90th birthday party, Daddy looked around the room at many admiring children, grandchildren and friends, smiled and said, "I can't tell you what a comfort it is to me to be here." The next day, he spent the afternoon responding to questions about life put to him by his family, with familiar lightheartedness. His 13 grandchildren hung on every word.

My 91 year old father in law lived a conventional life in the suburbs for many years. When he retired, 20 years ago, he and his wife moved to Key West, Florida, a colorful island community. My mother in law became increasingly frail and chose to spend most of her time at home in quiet pursuits. My father in law wanted to get exercise and began to attend a small gym. Someone there invited him to a Tae Kwon Do class. After several years of practice, and gradual progress, he determined to get his black belt. I was present, as were several of his grandchildren, the day he had his exam at age 80. I held my breath as he split boards with his hands and feet, waiting for the crunch of bones. The boards split but he did not. His grandsons watched in amazement. And I began to wonder what new physical activity I might try in my ninth decade of life?

My mother is 12 years younger than my father, and turns 80 this year. She has spent most of her life as a homemaker, dedicated to her husband and five children. WWII precluded her finishing college and she never had a career outside the home though she has long been active as a volunteer and friend. My siblings and I used to wish she would find something that was truly hers to do, and worry about whether she might become too invested in our lives if she outlived my father by many years. About 15 years ago, she took up painting for the first time. She took lessons regularly, and set aside a studio for her work. She began to paint portraits of her grandchildren, of the beach near her home, as well as of

gardens around the world. She discovered and developed what proved to be an enormous talent as an artist. Last year, she had one woman shows in both Chicago and Palm Beach with about 40 of her oil paintings.

To understand my parents' ageing, it would seem odd to tell stories about geriatric physiology instead of stories about creativity and learning and risk taking. My parents represent, what in some circles is called "successful ageing," the ability to maintain optimal well-being in the face of age-associated losses. My mother has transformed ageing into an art form, by her creative expression as a painter and by her singular enthusiasm for life. My father continues to make the choices he has always made – active learning, high challenge and active care for future generations. Gimp knees at 91 are an expected nuisance, not an identity. My parents' considerable gift to their children is that ageing is something we all welcome every day, wrinkles and all, a certain sign of the persistence of life over death.

In a vital intergenerational learning community, where life flourishes at every age, it is possible to develop an exalted view of ageing and its possibilities. But, for many, both young and old in the city of Chicago where I live, life is lost prematurely to isolation, despair, violence and addiction. We have institutionalized divisions of race, class, sector, culture, and economic means into political structures, mindsets, and housing patterns. As a person of faith, I know there is an alternative imagination in which everyone has a place at the table, a share of what's on the table, and is willing to be put under obligation. It would be unconscionable to run out of communion bread halfway through a Sunday service, or to serve it only to "important" or productive people. What will it take for us to assume more broadly that there is "bread enough for all?"

I organized a conference ten years ago on "Faith, Imagination and Public Life", gathering in lots of well-known Chicago justice pioneers and social innovators. I wanted to understand the imagination that had shaped Chicago over the last century – and stimulate a broad group of civic entrepreneurs to re-imagine Chicago as a whole. People introduced themselves by describing an image that had particular authority in their lives. By the second day, people were willing to dream, to describe images of Chicago's future ultimately worthy of human commitment. The image that came to me was of the recycling symbol, not just as an image of ecology, but as a representation of God's economy, in which nothing and no one is wasted. I began to imagine a city:

- where everyone is valued;
- where every citizen, young and old, applies their talents to create a positive future for themselves and their community;

- where hope comes alive in the flourishing and connecting of human lives; and
- where young people and others whose visions have been discounted, develop and contribute their ideas and energy.

Within three days, I set aside a 16 year corporate career to begin the work of discovering ways to bring the vision to life, in an initiative which became known as Imagine Chicago.

Full inclusion of both the young and the old, as two especially vulnerable populations, was a vital priority, as an urgent matter of social justice. (Ronald Marstin defines justice as fundamentally a matter of who is included and whom we can tolerate neglecting.) Expanding our collective creativity and innovation also depends on broader inclusion. Many technological innovations – the typewriter, telephone, transistor, computer, e-mail were originally developed to compensate for physical limitations like blindness, hearing and speech loss. Moving toward full inclusion of the elderly not only liberates our largest inventory of stories of what has been possible, and helps create a more just society, it also expands our collective capacity for wisdom and innovation. As we celebrate life matters, and expand our circle of who matters, what we are able to do and understand grows.

Imagine Chicago's first initiative was a citywide interview process involving approximately 50 young people who interviewed about 150 older people, recognized by members of Imagine Chicago's design team as "Chicago glue." The young people asked about highlights of their lives as citizens, what they had been able to create, what they had experienced as effective processes for the city to work together. Conversation with the old stretched their view of the human enterprise, their imagination about what possible by bringing the best of the past into dialogue with the energy and commitment of the future.

One pair that met in this process were Gertrude Nielsen and Tim Wilborn. Gertrude was 96, a mentally alert and astute widow, interested in building strong connections to the next generation, and to life outside her experience. Each year, she celebrated her birthday in the company of three year olds at a day care center she established. Tim was 14, black, living in the worst public housing in Chicago. Both were looking for ways to make a difference. Tim asked to interview her after he met her at a luncheon: "She's been everywhere and thinks Chicago is the best city in the world. I wanted to hear more." Gertrude was a neighbor of our family. I recognized how vigorously she thought about the future and not only the past, that she sought to be alive as possible every day, to keep her mind and spirit active and challenged. Her grandmother, who must have been born in the early nineteenth century had told her at the age of five, "Do something every day to help someone." And so she did. She became Imagine Chicago's first benefactor. She also

recognized in Tim a kindred spirit, someone willing to struggle and stretch, work hard and learn, value life and contribute to others. She offered to pay his way to university. They became good friends. He has now graduated from university, several years after Gertrude died just shy of her 101st birthday. This past summer, he helped launch Imagine Serbia.

The flowering of this friendship shows that it is possible to create exceptional relationships that avoid the stereotypes, judgments, defensiveness, fear and a priori decisions about who counts. To do so, in my experience, requires attention to constructive communication. Three dimensions are especially worth noting.

First is the power of positive framing. Human beings of any age are full of potential, rich in strengths and talents, with energy and vitality to dream and create. Even complaints mask a deep desire for change. Conversations therefore do not need to be about what our problems or needs are, but about how we can harness our capacities to make our lives and communities more vital. Stating affirmatively what we value, what we hope, what we want, enables us (as well as others) to understand and act on behalf of that vision. Reframing negative comments into positive desires can provide a way out of traps and into possibilities.

Second, conversations are invigorated by the power of inspiring questions. We can investigate anything – trouble or joy. The questions we ask set the agenda and determine what we find. Honest, open questions, asked in a spirit of friendship and genuine interest, enrich and deepen dialogue. They can clarify confusions and open up new images and understandings. Questions invigorate the imagination and stimulate learning and shared understanding. At a time in which the answers in hand are not sufficient for the challenges at hand, asking good questions becomes even more urgent.

The third generative power is active listening. Genuine dialogue is creative; something new happens in the "in-between" space that listening creates. When people listen deeply to one another, they honor each other and cultivate the trust and relationships so crucial for community to be created. They start not only to see, but also to "hear" the possibilities for their collective future.

All over the world, communities are struggling to name what they value and to organize partnerships through which those values can be lived. Partnerships require understanding and acknowledging that we do not have all the answers ourselves, that we are all vulnerable, that we need and depend on one another. What will develop confidence that by working together, acknowledging our common vulnerability, we can accomplish a greater good? One way is for us to experience inspiring and productive conversations with uncommon partners that expand what is

possible for our lives. In such encounters of constructive difference, we discover that our learning communities are much bigger than we thought – that the stranger can become a friend.

There is one more highly valuable dimension of ageing which provides exceptional opportunity – perhaps even more than extending productive capacity or expanding intergenerational connections. Ageing offers an invitation to become more conscious, more fully awake to life's possibilities and mysteries, to deepen our spiritual capacity. The invitation often arises out of circumstances we might not choose. Recently, a 70 year old neighbor, who has maintained a very active lifestyle, though she has MS, began to experience intense shooting pains in her legs. She tried everything she knew and her doctors recommended: exercise, diet, medication, massage trying to relieve the symptoms – without avail. She began having to cut back on most of her public activities and found herself falling into a depression. I stopped by to visit her and she said to me, "All my life I have done things, I have been reliable. People count on me. Life has felt under control. But now I cannot do that. It is driving me crazy. I know what I need to do now is to go inside, discover something about the inner life. But that is going to be really hard. I do not know how to do that ... just to *be* instead of *doing* things. It makes me uncomfortable for others to do things for me, even though they are glad to. Letting go, and going inside, is going to be the hardest thing I have ever had to DO."

"Just when you think you see the whole picture of life clearly, the channel changes."

To be fully awake to life's possibilities, we must be open to be shaped and stretched by the mystery within and around us. As we age, we can examine and probe the patterns of our lives, allow ourselves to welcome and not rail against life's mystery, however disconcerting to our established and more limited paradigms which help us maintain an illusion of control. Once we step out of the utter business which consumes much of our time, and out of the roles which assure our identity is valued by others, we have the chance to wrestle with life and meaning on our own terms. That requires courage and curiosity.

An eloquent hymn to conscious ageing which captures this wonderfully is TS Eliot's *Four Quartets* in which this inner struggle is described "at the still point of the turning world":

Except for the point, the still point, there would be no dance and there is only the dance.

... the inner freedom from the practical desire
the release from action and suffering,
release from the inner and outer compulsion,
yet surrounded by a grace of sense, a white light still and moving ...
both a new world and the old made explicit ...
Shall I say it again? In order to arrive there
To arrive where you are, to get from where you are not,
You must go by a way wherein there is no ecstasy
In order to arrive at what you do not know,
You must go by a way which is the way of ignorance.
In order to possess what you do not possess, you must go by the
way of dispossession.
In order to arrive at what you are not,
You must go through the way in which you are not.
And what you do not know is the only thing you know
And what you own is what you do not own
And where you are is where you are not ...
As we grow older

The world becomes stranger, the pattern more complicated
of dead and living ...

Eliot concludes *East Coker* with the words, "In my end is my beginning," exhorting "old men to be explorers, still and still moving into another intensity, for a further union, a deeper communion, through the dark cold and empty desolation ..."

Why is this good news? Because we are not fundamentally consumers or bodies but creatures who make meaning, who search for value and a sense of purpose and connection to something bigger than ourselves, who need not only to explain but to try and understand our lives. When we step back from the world's whirling for a time, the silence can speak to us if we let it, leading us to a larger truth, helping us see our lives in a deeper way.

Liberating imagination about ageing involves liberating imagination about living. As we learn, live passionately, take risks, welcome life's mystery, the community to which we belong and from which we draw courage grows, as does our courage to ask and live challenging questions. Welcoming all of life in its richness is a bold act, an act which establishes the dominion of life over death in a world in which that is becoming an urgent act of hope.

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Index to volume 5, 2003

AUTHORS

AHOKAS, I. and KAIVO-OJA, J., Benchmarking European information society developments, No. 1, pp. 44-54.

ALSAN, A. and ONER, M.A., An integrated view of foresight: integrated foresight management model, No. 2, pp. 33-45.

BARBANENTE, A. and KHAKEE, A., Influencing ideas and inspirations. Scenarios as an instrument in evaluation, No. 5, pp. 3-15.

BARTLETT, H., An ageing perspective, No. 6, pp. 26-33.

BOUWMAN, H. and VAN DER DUIN, P., Technological forecasting and scenarios matter: research into the use of information and communication technology in the home environment in 2010, No. 4, pp. 8-19.

BROWNE, B.W., Liberating imagination about ageing, No. 6, pp. 69-72.

BUCHAN, I.H., Future-imbedded innovation methodologies, No. 3, pp. 3-9.

BUSSEY, M., Youth voices: young Queenslanders' values in a time of structural ageing, No. 6, pp. 34-42.

CERUTTI, F., see SCHWAB, P.

DAFFARA, P., City of the aged versus City of all ages, No. 6, pp. 43-52.

EMBLEMSVÄG, J., The green invisible hand, No. 1, pp. 11-19.

FONTELA, E., Keynes and the future, No. 2, pp. 5-10.

FOO, C-T. and FOO, C-T., Forecastability, chaos and foresight, No. 5, pp. 22-33.

FOO, C-T., see FOO, C-T.

GLENN, J.C. and GORDON, T.J., Constructing peace scenarios for the Middle East, No. 4, pp. 36-40.

GORDON, T.J., and GLENN, J.C.

GRAVES, G., see REIF, L.

HAYWOOD, P., Resolving the moral impediments to foresight action, No. 1, pp. 4-10.

HENDERSON, H., Democratizing the information society, No. 4, pp. 50-55.

HERMAN, N., see REIF, L.

HINES, A., An audit for organizational futurists: ten questions every organizational futurist should be able to answer, No. 1, pp. 20-33.

HINES, A., The futures of futures: a scenario salon, No. 4, pp. 28-35.

HOSPERS, G.-J., Fourastiés foresight after 50 years, No. 2, pp. 11-14.

INAYATULLAH, S., Ageing: alternative futures and policy choices, No. 6, pp. 8-17.

INAYATULLAH, S., Alternative futures of transport, No. 1, pp. 34-43.

JEWELL, T., International foresight's contribution to globalisation, No. 2, pp. 46-53.

JORGENSEN, B., Baby Boomers, Generation X and Generation Y? Policy implications for defence forces in the modern era, No. 4, pp. 41-49.

KAIVO-OJA, J., see AHOKAS, I.

KARP, T., Is intellectual capitalism the future wealth of organisations?, No. 4, pp. 20-27.

KARP, T., Socially responsible leadership, No. 2, pp. 15-23.

KHAKEE, A., see BARBANENTE, A.

LIM, M.-K., Two horsemen of the Apocalypse: reflections on the Iraq wars, SARS and humanity's place among the stars, No. 4, pp. 3-4.

LOVERIDGE, D. and WOODLING, G., Through a glass darkly: the future and business revisited, No. 2, pp. 24-32.

MAHAFFIE, J.B., Professional futurists reflect on the state of futures studies, No. 2, pp. 3-4.

MEDERLY, P., NOVACEK, P. and TOPERCER, J., Sustainable development assessment: quality and sustainability of life indicators at global, national and regional level, No. 5, pp. 42-49.

MERKES, M., Women's working futures – views, policies and choices, No. 6, pp. 53-60.

MILLER, M. and SIGGINS, I., A framework for intergenerational planning, No. 6, pp. 18-25.

NOVACEK, P., see MEDERLY, P.

ONER, M.A., and ALSAN, A.

PORATH, A., Directed evolution in strategy and management sciences, No. 3, pp. 33-42.

REIF, L., HERMAN, N. and GRAVES, G., Preparing for the future: Queensland 2020, No. 6, pp. 4-7.

RICHARDSON, J., How one European community embraces a growing Muslim minority, No. 4, pp. 5-7.

RICHARDSON, J.G., The sweeping changes of 1867 – what became of them and how, No. 3, pp. 48-53.

ROWLEY, W.R., Healthcare 2025: alternative views and underlying values, No. 5, pp. 16-21.

SCHAFER, M.B., Nuclear power for the twenty-first century, No. 3, pp. 22-32.

SCHWAB, P., CERUTTI, F. and VON REIBNITZ, U.H., Foresight – using scenarios to shape the future of agricultural research, No. 1, pp. 55-61.

SIGGINS, I., see MILLER, M.

SUMMAK, A.E.G., Youngster's multi-dimensional future perceptions by the year 2020, No. 3, pp. 43-47.

TOPERCER, J., see MEDERLY, P.

VAN DER DUIN, P. and BOUWMAN, H.

VON REIBNITZ, U.H., see SCHWAB, P.

VOROS, J., A generic foresight process framework, No. 3, pp. 10-21.

WHEELWRIGHT, V., Ageing: a personal futures perspective, No. 6, pp. 61-68.

WINGER, A., Is that hothouse flower really here to stay?, No. 5, pp. 34-41.

WOODLING, G., and LOVERIDGE, D.

TITLES

Ageing: a personal futures perspective, WHEELWRIGHT, V., No. 6, pp. 61-68.

Ageing: alternative futures and policy choices, INAYATULLAH, S., No. 6, pp. 8-17.

(An) ageing perspective, BARTLETT, H., No. 6, pp. 26-33.

Alternative futures of transport, INAYATULLAH, S., No. 1, pp. 34-43.

(An) audit for organizational futurists: ten questions every organizational futurist should be able to answer, HINES, A., No. 1, pp. 20-33.

(An) integrated view of foresight: integrated foresight management model, ALSAN, A. and ONER, A., No. 2, pp. 33-45.

Baby Boomers, Generation X and Generation Y? Policy implications for defence forces in the modern era, JORGENSEN, B., No. 4, pp. 41-49.

- Benchmarking European information society developments, AHOKAS, I. and KAIVO-OJA, J., No. 1, pp. 44-54.
- City of the aged versus City of all ages, DAFFARA, P., No. 6, pp. 43-52.
- Constructing peace scenarios for the Middle East, GLENN, J.C. and GORDON, T.J., No. 4, pp. 36-40.
- Democratizing the information society, HENDERSON, H., No. 4, pp. 50-55.
- Directed evolution in strategy and management sciences, PORATH, A., No. 3, pp. 33-42.
- Forecastability, chaos and foresight, FOO, C-T. and FOO, C-T., No. 5, pp. 22-33.
- Foresight – using scenarios to shape the future of agricultural research, SCHWAB, P., CERUTTI, F. and VON REIBNITZ, U.H., No. 1, pp. 55-61.
- Fourastiés foresight after 50 years, HOSPERS, G-J., No. 2, pp. 11-14.
- (A) framework for intergenerational planning, MILLER, M. and SIGGINS, I., No. 6, pp. 18-25.
- Future-imbedded innovation methodologies, BUCHEN, I.H., No. 3, pp. 3-9.
- (The) futures of futures: a scenario salon, HINES, A., No. 4, pp. 28-35.
- (A) generic foresight process framework, VOROS, J., No. 3, pp. 10-21.
- (The) green invisible hand, EMBLEMSVAG, J., No. 1, pp. 11-19.
- Healthcare 2025: alternative views and underlying values, ROWLEY, W.R., No. 5, pp. 16-21.
- How one European community embraces a growing Muslim minority, RICHARDSON, J., No. 4, pp. 5-7.
- Influencing ideas and inspirations. Scenarios as an instrument in evaluation, BARBANENTE, A. and KHAKEE, A., No. 5, pp. 3-15.
- International foresight's contribution to globalisation, JEWELL, T., No. 2, pp. 46-53.
- Is intellectual capitalism the future wealth of organisations?, KARP, T., No. 4, pp. 20-27.
- Is that hothouse flower really here to stay?, WINGER, A., No. 5, pp. 34-41.
- Keynes and the future, FONTELA, E., No. 2, pp. 5-10.
- Liberating imagination about ageing, BROWNE, B.W., No. 6, pp. 69-72.
- Nuclear power for the twenty-first century, SCHAFFER, M.B., No. 3, pp. 22-32.
- Preparing for the future: Queensland 2020, REIF, L., HERMAN, N. and GRAVES, G., No. 6, pp. 4-7.
- Professional futurists reflect on the state of futures studies, MAHAFFIE, J.B., No. 2, pp. 3-4.
- Resolving the moral impediments to foresight action, HAYWARD, P., No. 1, pp. 4-10.
- Socially responsible leadership, KARP, T., No. 2, pp. 15-23.
- Sustainable development assessment: quality and sustainability of life indicators at global, national and regional level, MEDERLY, P., NOVACEK, P. and TOPERCER, J., No. 5, pp. 42-49.
- (The) sweeping changes of 1867 – what became of them and how, RICHARDSON, J.G., No. 3, pp. 48-53.
- Technological forecasting and scenarios matter: research into the use of information and communication technology in the home environment in 2010, BOUWMAN, H. and VAN DER DUIN, P., No. 4, pp. 8-19.
- Through a glass darkly: the future and business revisited, LOVERIDGE, D. and WOODLING, G., No. 2, pp. 24-32.
- Two horsemen of the Apocalypse: reflections on the Iraq war, SARS and humanity's place among the stars, LIM, M-K., No. 4, pp. 3-4.
- Women's working futures – views, policies and choices, MERKES, M., No. 6, pp. 53-60.
- Youngsters' multi-dimensional future perceptions by the year 2020, SUMMAK, A.E.G., No. 3, pp. 43-47.
- Youth voices: young Queenslanders' values in a time of structural ageing, BUSSEY, M., No. 6, pp. 34-42.