FURTHER WORK ON MEASURING OLDER POPULATIONS IN INSTITUTIONS

Note by the Secretariat

*In June 2019, the Conference of European Statisticians (CES) endorsed the "Recommendations on Measuring Older Populations in Institutions" and requested the Bureau to discuss how to take forward the issues for further work identified in the Recommendations. **The Bureau reviewed the proposals and decided on the next steps.***

I.   BACKGROUND

1.   At its 67th plenary session in June 2019, the Conference of European Statisticians (CES) endorsed the *Recommendations on Measuring Older Populations in Institutions* and requested the CES Bureau to discuss how to take forward the issues requiring further work. Section II of the document describes potential directions for further work proposed in the Recommendations. Section III includes action requested from the Bureau.

II.   PROPOSALS FOR FURTHER WORK

2.   The CES *Recommendations on Measuring Older Populations in Institutions* identify the following five directions of further work:

   (a)   Development of a statistical classification of institutions;

   (b)   Analysis of the measurement bias arising from omission of institutional residents;

   (c)   Development of guidance for gathering administrative data from small institutions;

   (d)   Fostering of synergies of the official statistics and research communities;

   (e)   Cross-fertilizing experiences across different areas of survey-taking for use among older respondents in institutions.

3.   The sections below outline a potential way forward in the first three directions, (a)-(c) as they could be in principle addressed by an international team under CES. Work in the last two directions is of an ongoing general nature.

A.   Development of a statistical classification of institutions

4.   The *Recommendations on Measuring Older Populations in Institutions* describe the different and often overlapping criteria that countries use to classify their institutions. The

criteria include type of services and facilities provided, provider of the institutional care, type or level of health care services, clients' needs and physical environment. Moreover, national classifications of institutions are applied to an even more fluid and less clear-cut reality than the categories used might imply. Hence some countries have an "other" category for institutions not classified elsewhere.

5.   A classification would need to be sufficiently "future-proof" as types of residential care and assisted living offered to older populations are constantly evolving. A detailed classification would lose its value if its categories would not apply any more or would not distinguish pertinent differences. Therefore, it would be necessary to gather information on the services provided by institutions and characteristics of the groups to whom they cater, as well as to disaggregate statistics on institutional populations to the greatest extent possible. **Developing a checklist of internationally defined criteria would be a key step towards greater harmonization across countries.**

6.   These activities would pave way for developing a statistical classification of institutions based on certain characteristics, such as facilities provided, type of organization, and physical environment. The work should rely on the characteristics collected for the System of Health Accounts and the work of OECD. The result would provide the basis for internationally comparable statistics on populations in institutions.

7.   The Task Force that prepared the current Recommendations consisted of experts from national statistical offices, who reached out to various national stakeholders for more information. The development of an international classification of institutions would have to **integrate broad expertise** from national statistical offices, ministries and agencies governing institutions for older populations, charitable organizations, and academia. It should involve the preparatory steps outlined in paragraph 5 as well as testing under the distinctly different contexts present in countries of the CES.

8.   A crucial question for the development of such classification is **the scope of institutions** it should embrace. Reflecting the motivation to improve ageing-related statistics, the Recommendations concern only the institutions and institutional populations as they pertain to older people. It could be argued that once a classification of institutions is developed it would have to encompass all institutions where people live, across all ages. This would expand the scope to institutions such as student residences, military barracks, children's orphanages and juvenile detention centres, which would require even broader expertise.

B.   Analysis of the measurement bias arising from omission of institutional residents

9.   The analyses presented in chapter 3 of the Recommendations conclude that there can be no across the board recommendation on including or excluding institutional populations in ageing-related statistics, calling for a more nuanced approach and further analyses of the related bias. Such analyses could bolster the evidence base to drive countries to begin including this population group more systematically in data collection, especially in cases where the bias is found to be significant.

10.   CES could promote such work. This could entail identifying a group of national statistical offices some of whose surveys include institutional populations, developing a common approach for analysing the impact of its omission, and carrying out the analyses. The common approach could rely on the most recent experience in international research projects in this area. The activities would have to include a systematic review of existing research findings.

C.   Development of guidance for gathering administrative data from small institutions

11.   The Recommendations refer to a proliferation of living arrangements in many countries to meet the needs of ageing populations, including assisted living facilities and seniors' residences, which grant more autonomy to residents than nursing homes, for example. Some countries promote "dwellings for the aged and disabled" that are not included in the institution category as they do not have a full-time service offer but may be equipped for functionally disabled residents and have common floorage and household.

12.   Existing general guidance on the use of administrative sources, including international guidance such as the UNECE *Handbook on Using Administrative Sources*, is directly relevant to this issue and should be considered when using administrative sources for measuring older population in institutions. However, smaller institutions may not appear on the typical administrative sources, so a different approach might be needed to obtain data on them.

13.   Specific guidance is absent for gathering administrative data from the numerous small institutions that exist in some countries. Development of such guidance would be valuable for including the population living in small institutions in statistics on institutional population. Participation from the relevant ministries and agencies would be required to clarify the scope and feasibility of developing such statistical guidance.

III.   ACTION REQUESTED FROM THE BUREAU

14.   **The Bureau is invited to discuss next steps, if any, towards further work on measuring older populations in institutions.**

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