

Community Care Fund
“Pilot Scheme on Living Allowance
for Carers of Elderly Persons from Low-income Families”
Evaluation Report

Purpose

This paper aims at reporting the implementation of the “Pilot Scheme on Living Allowance for Carers of Elderly Persons from Low-income Families” (the Pilot Scheme), the evaluation of the Pilot Scheme, and the regularisation arrangement of the Pilot Scheme.

Implementation of the Programme

2. The Pilot Scheme, through providing carers of elderly persons from low-income families with a living allowance, aims to help supplement their living expenses so that elderly persons in need of long-term care services may, with the help of their carers, remain living in their familiar community.

3. The Pilot Scheme was implemented in four phases, commencing in June 2014 and ending in September 2023. The target total number of beneficiaries for carers of elderly persons under the four phases of the Pilot Scheme was 8 000. Eligibility criteria for Phase IV of the Pilot Scheme are set out at **Appendix**.

4. The implementation of Phase IV of the Pilot Scheme generally followed the operating mode of Phase III, with the following enhancement measures:

- (i) **Number of carer beneficiaries:** Provide an additional 2 000 places in Phase IV of the Pilot Scheme, bringing the total number of carer beneficiaries under the four phases of the Pilot Scheme to 8 000;
- (ii) **Care-giving hours:** Countable care-giving hours by the carers cover situations where the elderly person(s) being taken care of has(/have) undergone long-term hospitalisation (i.e. continuous in-patient treatment for more than three months) or the elderly person(s) being taken care of, together with the carers, is(/are) temporarily away from Hong Kong while the carers continue to provide care (not exceed 30 days at a time under Phase IV of the Pilot Scheme);
- (iii) **Frequency of interviews and/or home visits:** Frequency of interviews and/or home visits provided by Approved Service Providers (ASPs) is adjusted from once a month in the first 6 months to once a month in the first 4 months, and thereafter from once a quarter to once every 4 months;

- (iv) **Service fee for ASPs:** In the light of the adjustment to the frequency of interviews and/or home visits provided by ASPs, the service fee payable to ASPs for serving each carer is adjusted from \$600 per month for the first 6 months to \$600 per month for the first 4 months, and \$360 monthly from the 7th month onwards to the 5th month onwards; and
- (v) **Expanding the use of training fee:** The use of training fee is expanded to cover expenses incurred by carers attending training (e.g. expenses on respite services).

5. The Social Welfare Department (SWD) has issued letters by batches to elderly persons who had been on the Central Waiting List for subsidised long-term care services by a specific date to invite their carers to participate in the Pilot Scheme. From June 2014 to July 2023, a total of 7 566 carers had been assessed to be eligible for receiving the living allowance, among which 1 747 carers were still receiving the living allowance as at end-July 2023, while the remaining 5 819 carers had ceased participating in the Pilot Scheme for various reasons (such as the elderly persons being taken care of were admitted to residential care homes for the elderly/passed away or the carers had started receiving Comprehensive Social Security Assistance/Old Age Living Allowance, etc.).

6. The District Elderly Community Centres and Neighbourhood Elderly Centres were invited to be ASPs under the Pilot Scheme. In Phase IV of the Pilot Scheme, there were 170 ASPs across the territory. Since the commencement of the Pilot Scheme, these ASPs have provided 7 566 eligible carers and 7 692 elderly persons being taken care of with the necessary support and follow-up services, including referral, arrangement for training, home visits to follow up on the caregiving situation, emotional counselling to carers when necessary, etc. While their carers are receiving the allowance, the elderly persons being taken care of could continue to wait for long-term care services or use subsidised community care services.

7. As at end-July 2023, the Pilot Scheme had disbursed around \$627.84 million, including around \$544.1 million on the carer living allowance, \$0.1 million on training fee for the carers and \$83.64 million on service fee for ASPs.

Consultancy Study by the Sau Po Centre on Ageing of the University of Hong Kong (CoA)

8. SWD commissioned the CoA to conduct a Consultancy Study on “Pilot Scheme on Living Allowance for Low-income Carers of Persons with Disabilities” and “Pilot Scheme on Living Allowance for Carers of Elderly Persons from Low-income Families” (the Consultancy Study) to evaluate the effectiveness of the Pilot Schemes. The Final Report of the Consultancy Study was completed in March 2022. The findings revealed that the Pilot Schemes were effective in supporting carers to continue taking care of elderly persons/persons with disabilities such that the latter could remain

living in the community. The major findings suggested that the Pilot Scheme could prevent the elderly's admission to Care and Attention Home, promote ageing-in-place (AIP), and maintain carers' wellbeing so that carers can continue to take care of elderly persons with decreasing functional level.

9. The Consultancy Study found that monthly living allowance and regular support from ASPs could alleviate carers' burden, improve the elderly persons' quality of life and family relations, thereby enabling carers to continue taking care of the elderly persons in the community. Many carers shared that ASPs were able to support them emotionally through regular home visits and thus alleviate their burden. The findings suggested that financial assistance was not the only solution to alleviating the caregivers' burden, while a combination of living allowance and support services could better achieve the policy objective of promoting AIP.

Conclusion

10. The Pilot Scheme has helped improve the quality of life of the elderly persons being taken care of, alleviate the carers' stress and facilitate elderly persons' ageing-in-place. In view of the effectiveness of the Pilot Scheme in supporting carers of elderly persons from low-income families throughout the years, it was announced in the 2022 Policy Address that the Pilot Scheme would be regularised in October 2023 which would benefit more carers of elderly persons from low-income families.

Labour and Welfare Bureau
Social Welfare Department
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**Phase IV of the Pilot Scheme on Living Allowance for
Carers of Elderly Persons from Low-income Families**

Eligibility Criteria

Carers of elderly persons applying for the living allowance of the Pilot Scheme must meet the following criteria:

- (i) The elderly person(s) being taken care of must be living in Hong Kong, and has/have been assessed by MDS-HC 2.0 under SWD's Standardised Care Need Assessment Mechanism for Elderly Services (SCNAMES) to be of moderate or severe level of impairment, and has/have been on the Central Waiting List (CWL) for subsidised long-term care services [i.e. residential care services (RCS) and/or community care services (CCS)] on or before 30 November 2018; or remain on the CWL for subsidised long-term care services [i.e. RCS and/or CCS] under the subsequent assessment by interRAI-HC 9.3;
- (ii) The elderly person(s) being taken care of must be living in the community, and without using any RCS during the application period and while receiving the allowance;
- (iii) The carer must be capable of taking up the care-giving role^(Note 1) and is providing at least 80 hours of care-giving work per month^(Note 2); or not less than a total of 120 hours per month for taking care of more than one elderly person who meets the above-mentioned criteria at the same time;
- (iv) The carer must be a Hong Kong resident living in Hong Kong and not engaged in any form of employment relationship with the elderly person(s) being taken care of;
- (v) The carer must not be a recipient of Comprehensive Social Security Assistance (CSSA), Old Age Living Allowance (OALA) or allowance in respect of taking care the same elderly person under Phase III of the "Pilot Scheme on Living Allowance for Low-income Carers of Persons with Disabilities" of CCF; and
- (vi) The carer is from a low-income family with monthly household income of the carer and the household members residing with him/her^(Note 3) does not exceed the specified income limit applicable to the corresponding household size, excluding assets. (Please refer to the table below for the monthly household income limit).

Monthly Household Income Limit

The income limit is set with reference to 75% of the 2019 Median Monthly Domestic Household Income (MMDHI) of economically active households published by the Census and Statistics Department and is applicable throughout the whole period of Phase IV of the Pilot Scheme.

Household size	Monthly household income limit (\$)
1	15,100
2	22,000
3	26,800
4	33,500
5	40,200*
6 or above	42,900*

* The monthly household income limit for household size of 5 and 6 or above is set with reference to the MMDHI for household size of 5 and 6 or above published in the Report on General Household Survey for the Fourth Quarter of 2017.

Note 1: Any person who is under the age of 15, or has been assessed under SCNAMES to be of moderate or severe level of impairment, or is being on the CWL for subsidised long-term care services, or is a recipient of Disability Allowance, will not be deemed to be a fit and capable carer and therefore will not be eligible for the allowance of Phase IV of the Pilot Scheme.

Note 2: The care provided by the carer to the elderly person(s) refers to independent activities of daily living, such as meal preparation, home making, medication management, purchase of daily necessities, and escort, etc. and/or personal care assistance in activities of daily living required by the elderly person(s) concerned, such as moving, dressing, toileting, and personal hygiene, etc. For some carers taking care of elderly persons with behavioral or emotional problems, the time needed to calm down the elderly persons before the above daily living care can be provided may be counted as care-giving hours. In addition, the number of hours for the carer to attend training can also be counted as care-giving hours.

Note 3: Household members generally refer to people residing with the applicant in Hong Kong and have close economic ties with him/her (but excluding economic ties arising from employment relationship). This includes household members and those who share or are obliged to share the provisions for a living. Such member(s) and/or person(s) must be Hong Kong resident(s). The monthly household income refers to the average monthly income for the three months prior to the month when the application is submitted, any income received out of those three months can be excluded. For income not paid on monthly basis, e.g. double pay, bonuses, contract gratuity, dividend, etc., it should be apportioned over the period concerned for calculation. Income includes the following items

1. Employment earnings: salary, double pay/leave pay, work allowance, bonuses/prize/commission/tip/contract gratuity, income from rendering services, business profits, etc.; and
2. Other income: contributions from children, financial assistance from relatives/friends, alimony, monthly pension/widow's and orphans' payment or pensions, investment profits, interest income from fixed deposits, dividends, rental income, etc.

but excludes employee's mandatory contribution to the Mandatory Provident Fund (MPF) Scheme (i.e. the 5% mandatory contributions made by employees to an MPF Scheme), financial assistance provided by the Government, charitable donations, subsidies from other assistance programmes under CCF, etc.