



Latin American and Caribbean Demographic Centre (CELADE)
Population Division of ECLAC

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**GUIDE FOR THE PREPARATION OF COUNTRY REPORTS
ON THE APPLICATION OF THE REGIONAL STRATEGY FOR THE IMPLEMENTATION
IN LATIN AMERICA AND THE CARIBBEAN OF THE MADRID INTERNATIONAL
PLAN OF ACTION ON AGEING**

1. Introduction

The second Regional Intergovernmental Conference on Ageing will be held in Brasilia, Brazil, from 4 to 6 December 2007. The purpose of the Conference will be to consider progress in the application of the Regional Strategy for the Implementation in Latin America and the Caribbean of the Madrid International Plan of Action on Ageing. The Conference will also identify priority areas for action for the next five years and agree the region's contribution to the forty-sixth session of the Commission for Social Development, to be held in February 2008.

The Latin American and Caribbean Demographic Centre (CELADE)-Population Division of the Economic Commission for Latin America and the Caribbean (ECLAC), in its capacity as the technical secretariat of the Regional Intergovernmental Conference on Ageing, is providing this Guide to national bodies with responsibilities in the area of ageing, in order to support the countries' efforts to systematize and analyse the progress that will be presented during the Conference.

The Regional Strategy is a frame of reference which was agreed in 2003 by the member States of ECLAC, and ratified in March 2004 during the thirtieth session of the Commission. The Strategy contains agreed guidelines to be implemented by the countries in response to the needs and interests of older persons with a view to fostering the creation of conditions that allow them to live in dignity and security.

This Guide will provide guidance for countries to organize the available information and prepare a narrative and analytical document, for presentation at the Conference in Brasilia, setting out recent achievements in terms of measures implemented for older persons.

2. Background

The Madrid International Plan of Action on Ageing was approved by the Second World Assembly on Ageing in 2002. This plan is a programming instrument containing over a hundred recommendations in three priority areas: (i) older persons and development; (ii) fostering health and well-being during old age; and (iii) creation of an enabling and supportive environment.

Pursuant to ECLAC resolution 590(XXIX), the Regional Intergovernmental Conference on Ageing was held from 19 to 21 November 2003. This meeting was convened by the Government of Chile with support from ECLAC and the other members of the Inter-Agency Group on Ageing (United Nations Population Fund (UNFPA), Pan American Health Organization (PAHO), International Labour Organization (ILO), Inter-American Development Bank (IDB), World Bank and United Nations Programme on Ageing).

The Conference was the first intergovernmental meeting held on the issue in the region and served as an analytical and discussion forum on the situation with respect to ageing and older persons. It culminated in the adoption of the *Regional Strategy for the Implementation in Latin America and the Caribbean of the Madrid International Plan of Action on Ageing*.

The Regional Strategy contained goals, objectives and recommendations for action for the benefit of older persons in the following three priority areas:

- *Older persons and development*, which includes the protection of the human rights of older persons; access to decent employment and credit for microenterprises, formal employment for older persons, improvement of coverage of contributory and non-contributory pensions, the creation of conditions for participation during old age and access to opportunities for lifelong education.
- *Promotion of health and well-being into old age*, which includes universal coverage of health services, comprehensive health-care services suited to the needs of older persons; promoting healthy

behaviours and environments through sectoral programmes, regulations for long-term services, human resource training and monitoring the state of health of older persons.

- *Creation of enabling and supportive environments*, which includes adapting the physical environment in order to enable older persons to live independently, providing appropriate sustainable support systems and promoting a positive image of ageing.

Parts five and six of the document indicate the actions that countries, international and intergovernmental organizations and ECLAC – in its capacity as technical secretariat – should carry out in order to implement, review and appraise the Regional Strategy. Paragraph 57 of this text establishes that the ECLAC sessional Ad Hoc Committee on Population and Development is the most suitable intergovernmental body for monitoring implementation of the Strategy within the region.¹

In compliance with this agreement, ECLAC organized three follow-up meetings in 2004 and 2005 on the implementation of the Strategy:

- Caribbean Symposium on Population Ageing, held in Port of Spain, Trinidad and Tobago, from 8 to 10 November 2004.²
- Meeting of Experts on Ageing – Second Central American and Caribbean Forum on Policies for Older Persons, held in San Salvador, El Salvador, from 9 to 12 November 2004.³
- Meeting of Governments and Experts on Ageing in South American Countries, held in Buenos Aires, Argentina, from 19 to 21 November 2005.⁴

ECLAC resolution 616 (XXXI) of 2006 requests the secretariat to organize a conference to review and assess the advances made by the countries of the region in the application of the Regional Strategy. ECLAC, in conjunction with the Government of Brazil, will therefore be holding the second Regional Intergovernmental Conference on Ageing in December of this year. This Conference will be structured around four meetings, which will address the following issues:

- Priority area I: older persons and development
- Priority area II: promotion of health and well-being into old age
- Priority area III: creation of enabling and supportive environments
- Implementation and monitoring of the Regional Strategy for the Implementation in Latin America and the Caribbean of the Madrid International Plan of Action on Ageing.

The first day of the meeting will be devoted to a plenary session during which member countries will report on their advances. Country representatives are expected to discuss those areas of work for which they have empirical evidence of the impact that these interventions have had on the living conditions of older adults.

¹ This measure was reaffirmed by the ECLAC member States in resolution 604(XXX) of 2004.

² See ECLAC, Report of the Caribbean Symposium on Population Ageing (LC/CAR/.L.41), Port of Spain, ECLAC subregional headquarters for the Caribbean, May 2005.

³ See ECLAC, Report of the Meeting of Experts on Ageing - Second Central American and Caribbean Forum on Policies for Older Persons, (LC/L.2347), Santiago, Chile, 2005.

⁴ See ECLAC, Informe de la Reunión de Gobiernos y expertos sobre envejecimiento en países de América del Sur (LC/L.2547), Santiago, Chile, 2006.

3. Recommendations for the preparation of national reports on the application of the Regional Strategy

This section contains recommendations to assist countries with the preparation of their respective reports. They are not intended to be a mandatory framework but rather to serve as guidelines which may be used depending on the information available and the detail that countries will submit in their reports.

a) Preliminary considerations

Before starting to write up their report, member countries should take into account the following suggestions:

- The purpose of the report is to give an account of actual advances – in terms of results and impacts – which the countries of the region have made in applying the Regional Strategy for Implementation in Latin America and the Caribbean of the Madrid International Plan of Action on Ageing.
- The reports are national in scope. This means that all government bodies that adopt measures on behalf of older persons must be involved during the process of preparation of the documents.
- The reporting period is the past five years; data relating to previous periods may be used, however, for the purpose of comparing results and impacts.

Information for the calculation of indicators will not always be available for the exact years between 2002 and 2007, but it is to be hoped that estimates at least may be produced for (or close to) the year of the first Regional Intergovernmental Conference on Ageing (held in Santiago in 2003) and for the most recent year for which data are available.

- It is recommended that mechanisms be set up to enable older persons to participate in the preparation of the national reports.
- It is recommended that the reports include statistical data for measuring the results together with as many annexes as are considered appropriate. Where possible, qualitative information should be generated to respond to any specific aspects of the guidelines for review and assessment of the Regional Strategy.
- To the extent possible, the report should not be more than twenty-five (25) pages in length. Any additional information should be presented as an annex.

b) How to use this Guide

The list of questions presented in the following section is based on the contents of the Regional Strategy and may be used by countries to prepare their national reports. In this way, for each of the objectives, basic questions are included that seek to identify the principal achievements made in this area in the past five years. The steps to be taken for preparation of the report are as follows:

- Set up a work team to coordinate and draft the final report;
- Review and consider for analysis the List of questions for the review and appraisal of the priority areas of the Regional Strategy for the Implementation in Latin America and the Caribbean of the Madrid International Plan of Action on Ageing;

- Based on the List of questions, identify the areas in which the country has made notable progress. It may be useful to refer to the indicators presented in the Manual sobre indicadores de calidad de vida en la vejez (Spanish only) (<http://www.cepal.org/celade/ageing>)
- Compile the quantitative information available for describing the advances in accordance with the requirements established in the List of questions, and summarize the results of this analysis in section I (as listed in the table of contents presented in box 1);
- Identify the areas in which the country considers that it has not made significant advances and sum them up in section II (as listed in the table of contents presented in box 1);
- Prepare the report. A proposed structure for the status report, based on the objectives set out in the Regional Strategy (indicated in brackets), is given in box 1.

**BOX 1:
PROPOSED TABLE OF CONTENTS FOR THE NATIONAL REPORTS**

<p>PRESENTATION</p> <p>I. ADVANCES IN PRIORITY AREAS OF THE REGIONAL STRATEGY</p> <p>2.1. PRIORITY AREA I: OLDER PERSONS AND DEVELOPMENT</p> <ul style="list-style-type: none"> - Human rights (OBJECTIVES 1 AND 5) - Employment (OBJECTIVES 2 AND 3) - Social security (OBJECTIVE 4) - Education (OBJECTIVE 6) <p>2.2. PRIORITY AREA II: PROMOTION OF HEALTH AND WELL-BEING INTO OLD AGE</p> <ul style="list-style-type: none"> - Health services (OBJECTIVES 1 AND 2) - Healthy environments (OBJECTIVE 3) - Long-stay institutions (OBJECTIVE 4) - Human resources (OBJECTIVE 5) - Monitoring the health status of older persons (OBJECTIVE 6) <p>2.3. PRIORITY AREA III: CREATION OF ENABLING AND SUPPORTIVE ENVIRONMENTS</p> <ul style="list-style-type: none"> - Housing and transport (OBJECTIVE 1) - Social support systems (OBJECTIVE 2) - Discrimination and violence (OBJECTIVE 3) - Image (OBJECTIVE 4) <p>II. ADVANCES IN THE APPLICATION AND FOLLOW-UP OF THE REGIONAL STRATEGY</p> <ul style="list-style-type: none"> - Governing institution and mechanisms for participation in decision-making (1/2 page) - Legislation and policies designed for older persons (1/2 page) - Budgetary allocation to ageing as a percentage of GDP (1/2 page) <p>III. FUTURE CHALLENGES TO THE APPLICATION OF THE REGIONAL STRATEGY</p> <p>IV. SUMMARY</p>

(c) **Deadlines for submission and presentation of the report**

The report must be submitted by **1 September 2007** to ECLAC using the following e-mail address: sandra.huenchuan@cepal.org.

The reports submitted to the secretariat will be reproduced and distributed as conference room papers during the meeting. A summary of the report (statement by the head of delegation) may be presented by each country during the second Regional Intergovernmental Conference on Ageing, scheduled to be held in Brasilia, Brazil from 4 to 6 December 2007.

**LIST OF QUESTIONS FOR THE REVIEW AND APPRAISAL OF THE PRIORITY AREAS OF THE
REGIONAL STRATEGY FOR THE IMPLEMENTATION IN LATIN AMERICA AND THE CARIBBEAN
OF THE MADRID INTERNATIONAL PLAN OF ACTION ON AGEING**

PRIORITY AREA I: OLDER PERSONS AND DEVELOPMENT

OVERALL GOAL: PROTECTION OF THE HUMAN RIGHTS OF OLDER PERSONS AND CREATION OF CONDITIONS OF ECONOMIC SECURITY, SOCIAL PARTICIPATION AND EDUCATION THAT PROMOTE THE SATISFACTION OF OLDER PERSONS ' BASIC NEEDS AND THEIR FULL INCLUSION IN SOCIETY AND DEVELOPMENT

Objective 1: Promote the human rights of older persons

- (i) What are the principal legislative reforms relating to the human rights of older persons implemented in the past five years? State the number of each law and the year of its adoption and implementation. Please attach the relevant documents.
- (ii) Has your country moved forward with the creation of legislation to protect the rights of older persons? Please attach the relevant documents.
- (iii) Does your country include the situation of older persons in its reports to the Committee on Economic, Social and Cultural Rights, as called for in General Comment 6 of 1995, or to other international human rights treaty bodies such as the Human Rights Committee or the Committee for the Elimination of Discrimination against Women? Please attach the relevant information.
- (iv) Please describe the legislative, judicial, administrative, educational or other measures that have been taken by your country to publicize and implement the international and regional norms and standards protecting the basic human rights and fundamental freedoms of older persons.
- (v) Does your country have appropriate judicial, administrative or other procedures for the submission, investigation and resolution of complaints relating to compliance with laws, policies and plans in respect of ageing? Please provide detailed information on such procedures.

Objective 2: Promotion of access, under conditions of equality, to decent employment, continuing training and credit for individual or community undertakings

- (i) Please provide information on the situation and trends relating to the employment of older persons in your country, disaggregating the information by gender and age, for the past five years.
- (ii) Please provide information on access to credit for older persons, by statistical series, for the past five years. Has the State intervened directly to increase access to credit instruments for older persons?
- (iii) What specific measures has your country taken to improve the employability of older persons (legal incentives to employ older persons, training programmes, microenterprise funds)? Please provide information on coverage, the annual amount of resources committed to such programmes, selectivity mechanisms if any, etc.

Objective 3: Promotion and facilitation of the inclusion of older persons in the formal-sector workforce

- (i) Describe the legal and administrative measures taken by your country to achieve continuity of employment for older persons. Provide a statistical series for the past five years, showing the effect of such measures on the integration of older persons in formal employment.
- (ii) Please provide information on the reduction of industrial accidents as a result of actions by the State to reduce safety risks in the employment of older persons.

Objective 4: Expansion and improvement of the coverage of both contributory and non-contributory pension schemes

- (i) Please provide statistical information on the coverage of contributory social security systems in your country for the past five years. The information should be disaggregated by gender, age group and area of residence.
- (ii) Does your country have any non-contributory pension schemes? If so, please provide statistical information on their coverage and on the amounts paid by gender, area of residence and ethnic origin of the recipients.
- (iii) Have any legal reforms been undertaken to increase solidarity in the social security system? Give the number of the law and the year of its adoption and implementation. Please attach the relevant documents.

Objective 5: Creation of suitable conditions for older persons' full involvement in society as a means of promoting their empowerment as a social group and strengthening the exercise of active citizenship

- (i) Please indicate whether your country has ratified the International Covenant on Economic, Social and Cultural Rights and the Additional Protocol to the American Convention on Human Rights in the Area of Economic, Social, and Cultural Rights. Please state the dates of ratification. If your country has not ratified all the relevant international agreements, please state the reasons.
- (ii) Describe the mechanisms established in your country to involve older persons in decision-making processes (councils, consultation processes, etc.) and give examples of their concrete application in an area of public policy.
- (iii) Please provide information on growth in the numbers of older persons' organizations in your country in the past five years (number of organizations and membership) and provide examples of the involvement of such organizations in public affairs at the community, local or national level.

Objective 6: Promotion of equal opportunities and access to lifelong education

- (i) Describe any continuing-education programmes in your country, their coverage and achievements in the past five years.

PRIORITY AREA II: FOSTERING HEALTH AND WELL-BEING DURING OLD AGE

OVERALL GOAL: OLDER PERSONS SHOULD HAVE ACCESS TO COMPREHENSIVE HEALTH-CARE SERVICES WHICH ARE SUITED TO THEIR NEEDS AND WHICH GUARANTEE A BETTER QUALITY OF LIFE IN OLD AGE AND THE PRESERVATION OF THEIR AUTONOMY AND ABILITY TO FUNCTION

Objective 1: Promotion of universal coverage for older persons to health-care services through the inclusion of ageing as an essential component of national legislation and policies on health

- (i) Please indicate whether your country is implementing international standards to ensure that older persons have equitable access to the necessary health care suited to their needs. Give examples of their implementation.
- (ii) Please state whether older persons in your country have access, universal and free of charge, to essential medicines and/or assistance and rehabilitation services. Please provide the relevant statistical information.
- (iii) Is your country taking specific action to ensure health care for older indigenous persons, pursuant to articles 24 and 25 of ILO Convention No. 169 concerning Indigenous and Tribal Peoples in Independent Countries?
- (iv) Please state whether special health care programmes have been set up in your country to care for older persons with access problems (poverty, disabilities, isolation or similar difficulties).

Objective 2: Establishment of comprehensive health-care services that meet the needs of older adults by strengthening and refocusing existing services and creating new ones where necessary

- (i) Has your country a national health plan for older persons which coordinates health-care services at the national, regional and local levels?
- (ii) Are there any specific measures regarding health care for older women? Please provide statistical information on coverage and the type of services provided to older women in the past five years.
- (iii) Does your country have a basic plan for products and technologies (such as prostheses, orthopaedic appliances and medications) which help to maintain functional autonomy in old age? Please provide statistical information on the coverage of that plan in the past five years.
- (iv) Please state whether your country has included older persons in mental health programmes, and what specific actions are conducted in this regard. Please provide information on coverage.
- (v) Does your country have a basic package of guaranteed health care, and, if so, does this include specific medical coverage for older persons?

Objective 3: Promotion of healthy personal behaviours and environments through legislation, policies, programmes and measures at the national and community levels

- (i) Has your country conducted national or local campaigns to promote healthy ageing? Please state the type of campaigns and their coverage.
- (ii) Please describe actions implemented by governmental bodies to organize community services for older persons in order to promote their social integration. Give details of the type of activities conducted and their impact on quality of life for older persons.

Objective 4: Creation of legal frameworks and suitable mechanisms for the protection of the rights of older persons who use long-term care services

- (i) Does your country have special legislation regulating the functioning of long-stay institutions? If so, give the number of the law and its dates of adoption and implementation. Please attach the relevant documents.
- (ii) Has your country created a mechanism for the inspection of public and private long-stay institutions? Please state the number of institutions inspected over the past five years, the procedures used and the positive effects of the inspections.
- (iii) Describe the actions that your country has implemented to ensure appropriate care and medical treatment for institutionalized older persons in accordance with international protection standards.
- (iv) Describe the mechanisms in place in your country to establish the legal capacity of institutionalized older persons. Are there any provisions for periodic reviews of these mechanisms?
- (v) How many long-stay institutions are there in your country? Please provide information on reasons for entry, financing (including State contributions), characteristics of the resident population and services provided.

Objective 5: Promotion of the development of human resources through the design and implementation of a national gerontology and geriatrics training plan for existing and future health-care providers at all levels of care, with emphasis on primary health care

- (i) Has your country developed strategies and plans for health-care training of human resources working with older persons? State the number of courses conducted and their subjects, the numbers of persons trained in the past five years, and their professions or functions.
- (ii) State the number of courses your country has conducted to instruct the staff of long-stay institutions in the rights and fundamental freedoms of older persons.
- (iii) State the number of geriatricians in your country, the number of primary health-care staff who are trained in caring for older persons, and the trends in those numbers.

Objective 6: Development and utilization of instruments for improving the understanding of the health status of older persons and monitoring changes in this regard

- (i) Has your country conducted surveys on disabilities or other issues, and did they include specific questions relating to the situation of older persons?
- (ii) Has your country invested public resources in research on active ageing? State the number of research projects conducted over the past five years, their subjects and the expected impacts on public policies.
- (iii) Please state whether your country has a system at the Ministry of Health level for monitoring the health status of older persons, or whether household surveys are used for that purpose.

PRIORITY AREA III: CREATION OF AN ENABLING AND SUPPORTIVE ENVIRONMENT

<p>OVERALL GOAL: OLDER PERSONS WILL ENJOY PHYSICAL, SOCIAL AND CULTURAL ENVIRONMENTS THAT ENHANCE THEIR DEVELOPMENT AND ARE CONDUCIVE TO THE EXERCISE OF RIGHTS AND DUTIES DURING OLD AGE</p>
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Objective 1: Adaptation of the physical environment to the characteristics and needs of older persons to enable them to live independently in their old age

- (i) Does your country have subsidy programmes to finance the purchase or improvement of housing for older persons? Please provide information on the coverage of such programmes, the amounts of financing provided, co-payment requirements, etc.
- (ii) Does your country have a system of specific transport discounts for older persons? Please provide information on how the discount is applied, the times at which it can be used, and the amount of resources provided by the State to enable this system to function.
- (iii) Does your country have specific housing programmes for persons with disabilities? Please provide details on the characteristics of the programme and its coverage by gender, age group and area of residence, requirements for access, etc.
- (iv) Describe measures implemented to ensure access to public places for older persons and persons with disabilities. Please provide detailed descriptions of these measures.

Objective 2: Increased availability, sustainability and suitability of social support systems for older persons

- (i) Does your country have training programmes for family caregivers? Please provide information on the number of caregivers trained in the past five years, the methods and course content, and the positive effects of this training.
- (ii) Is your country providing home-support services for older persons? Please provide information on the coverage of such services over the past five years, the financing provided by the State, and all other information considered relevant to this subject.
- (iii) State whether your country is promoting community-based care as an alternative to institutionalization. Describe what measures have been put into practice in the past five years, and the impact of their implementation on community solidarity.

Objective 3: Elimination of all forms of discrimination and mistreatment against older persons

- (i) Please provide statistical information on the incidence of mistreatment of older persons, by type of mistreatment, the gender and age of the victim, and other data which reflect the problem in your country.
- (ii) Describe the legal and institutional measures and programmes that your country has implemented to protect the life, physical, psychological and moral integrity, health and related human rights of older persons. Identify the legal reforms promoted in the past five years, and describe the prevention campaigns conducted in the same period and the creation and/or strengthening of institutions in that regard.
- (iii) State whether your country has promoted access to legal assistance so that mistreatment of older persons can be reported and punished. Please provide detailed information on the type of practices implemented and their coverage and impact.
- (iv) Please state whether your country has an ombudsman for the rights of older persons or a human rights ombudsman responsible for combating discrimination and mistreatment of older persons. Please provide information on the functions and concrete contributions of these institutions in protecting older persons.

Objective 4: Promotion of a positive image of old age

- (i) Describe the measures implemented in your country to combat the stigma and discrimination associated with ageing and with physical or mental disability in areas such as education, employment and access to public places.