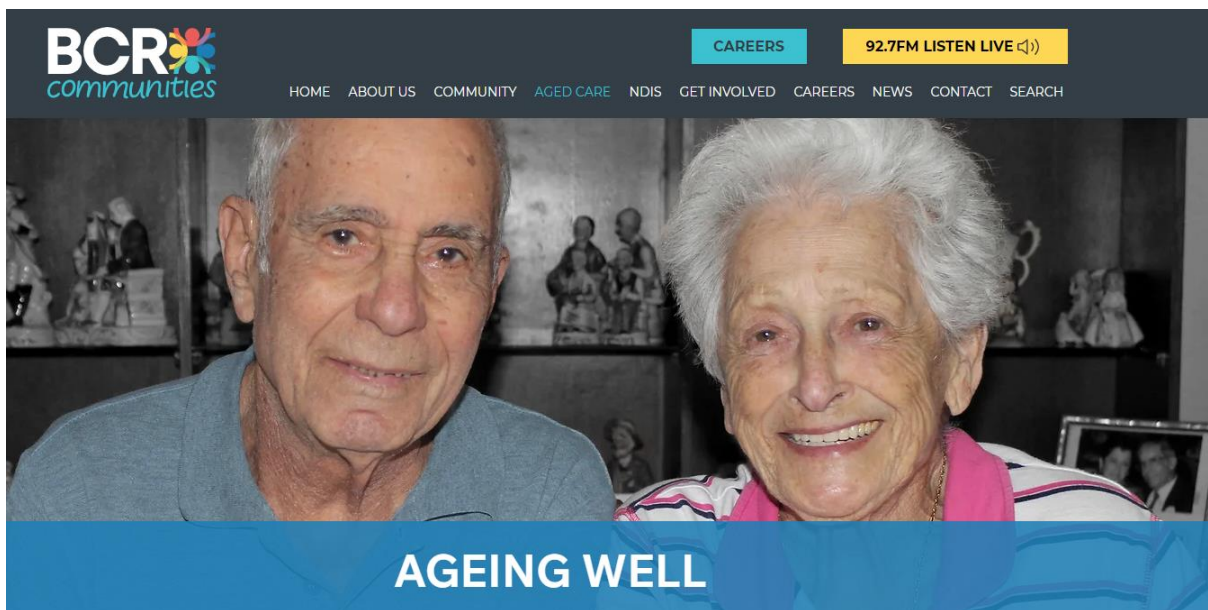


Regional Provider Blueprint for Developing a Values-Based Culture and Values-Driven Care Plans through Engagement, Empowerment and Technology

BCR Communities & ExSitu



March 2024

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Contents

Summary/Abstract	03
Background	04
Values-based care and culture -walking the talk.....	05
Project activities: Engagement	07
Project activities: Empowerment	09
Project activities: Technology	11
A pivotal moment in our project	12
What did clients say about documenting their values	14
Our learnings	15
Our opportunity to model care based on human rights	16
References	<u>17</u>

Summary/Abstract

BCR Communities was awarded a grant through the Aged Care Research & Industry Innovation Australia (ARIIA) program to deliver a Regional Provider Blueprint based on our values-based care program. The aim of the Blueprint is to share the learnings from our ARIIA project, so that as a sector, we can lead the change towards a values-based model of care.

The aim of the ARIIA project was to test our assumptions that, with positive values-driven culture, and a commitment to empowerment and simple, efficient technologies, we could operationalise care processes to support human rights so those we care for can make their own decisions in alignment with their individual values.

The results we were hoping to achieve through the research findings, and implementation of new processes and technology, was to increase meaningful social connection and reduce social isolation through the development and delivery of services which were aligned to an understanding of each person's values and wishes.

The key challenge explored was the balance we needed to strike as an aged care provider to:

1. Support a person's right to dignity of risk in the context of their right to self determination
2. Uphold our responsibilities in relation to duty of care.
3. Create a clear transparent process to navigate the potential conflict between dignity of risk and duty of care and align that to each person's individual values.

Methods used in this research project included the review of previously developed BCR in-home care client personas, client surveys, focus groups, regular project review meetings, and individual and group consultation sessions with key stakeholders including BCR Executive and Care Managers, Care Staff, BCR Clients and research partner representative from Carers NSW, University of Wollongong, Autonomy First Lawyers and technology partner ExSitu.

Using a participatory research, research-to-action approach (Cornwall, 1995) the project team progressively consulted and communicated with key BCR stakeholders on challenges, opportunities, findings, and actions through regular meetings, and also communicated the outcomes of internal changes and key findings through client and staff newsletters.

As a result of this project, our key findings include that:

- social connections can be improved within communities through simplified and efficient engagement, training and referral processes
- values-based technologies can be used effectively to address our three key challenges
- working collaboratively with values-driven organisations creates opportunities to positively impact older people by focussing on supported decision-making practices.

This project identifies opportunities to further this research and create sector wide change by professionalising key roles and improving supported decision-making practice. By progressing this research, we aim to improve models of care and the experience of older people by expanding providers understanding and delivery of rights-based decision making practice.

Background:

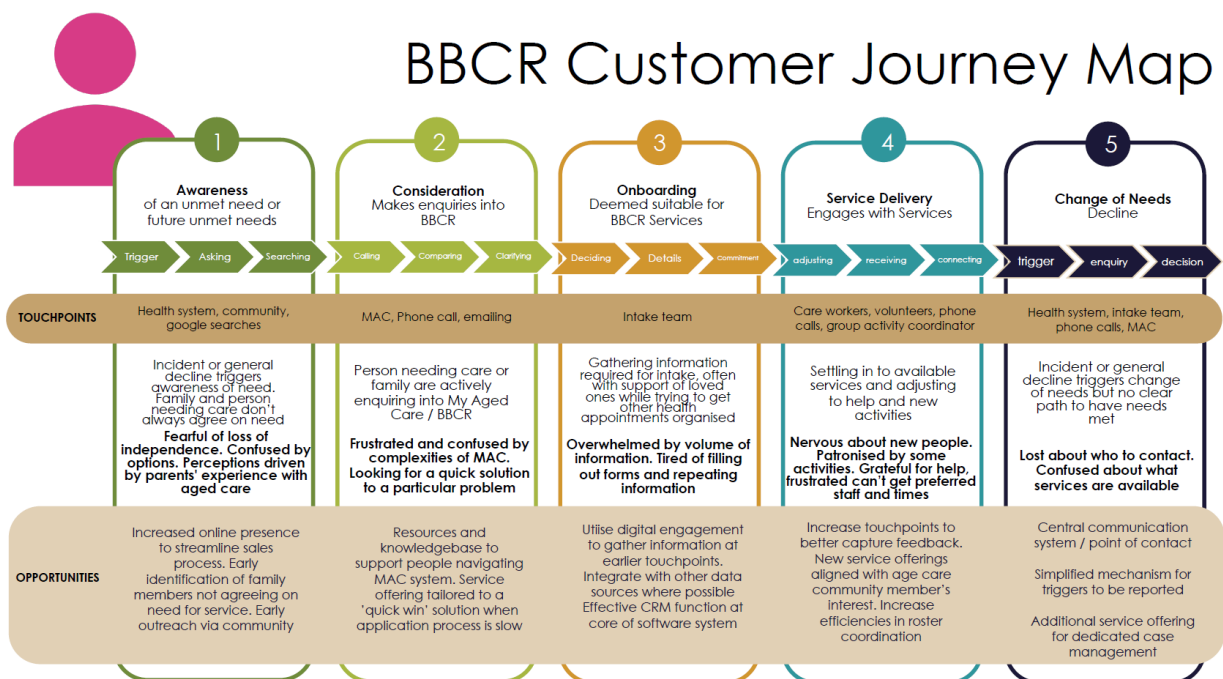
BCR Communities is based on the South Coast of NSW, and supports communities across the Illawarra & Shoalhaven to become more empowered and connected through their aged care in-home services, disability supports and youth & community services.

By Building Connected Resourceful Communities, BCR have an intentional focus on shared values in the delivery of care and services, and uses values-based recruitment practices to fill roles across the organisation. BCR have been collaborating with the team from ExSitu for over two years to support this work which was acknowledged through the InnovAGEING Awards with BCR and ExSitu finalists in the category of Improving Consumer Choice.

ExSitu was founded in the Illawarra as a software start up focused on supporting people who are vulnerable to express their will and preference. ExSitu software uses card sorting to support people to explore and document their values, so that decisions can be made in accordance with the specific wishes of the person under care. ExSitu focuses on individual values, which importantly means the tool is both culturally agnostic and person centred.

Prior to the commencement of this ARIIA Blueprint project, BCR communities had been working with ExSitu to understand the values of its community members through the creation of detailed customer journey maps, user personas, and process maps. This also assisted the organisation to better understand the needs of its community to tailor solutions that met both community members individual needs, and what they most valued. Our motivation for the ARIIA Blueprint project was developed after a full project review and identification of important discoveries made through that initial research.

Customer Journey Map created after interviewing community members in mid-2023.



The objectives of the ARIIA Grant were as follows:

- Increased participation in values-based services and activities
- Increased social connection, and encouraging social supports as the primary entry point into in home services rather than domestic assistance
- Increased diversity of financially viable services and activities
- Increase in valued contributors within community through engagement and feedback processes
- Increased staff and volunteer engagement
- Create time and cost efficiencies

Through the work completed collaboratively in 2023 which uncovered the need to focus on the onboarding process, we developed a rationale and tested the assumption that we could save time and money by streamlining our paper-based onboarding process using simple Microsoft software such as online forms. In testing our assumptions, we also identified the suitability of this timing in a customer's journey to discuss client's values and wishes. The understanding of each individual's values and wishes at this early stage would then help us to offer services which achieve the objectives of the ARIIA grant and the goals of the clients.

This document outlines the benefits and pitfalls of a values driven culture (and our project). It is not intended to be followed as a universal path, but provides some valuable learnings to guide providers on the journey towards values driven care and culture.

“Why do you need all this info when I just need someone to clean my bathroom?”

Direct quote from client when asked while conducting paper-based onboarding process.

Values-based care and culture – BCR ‘walking the talk’

It's not unusual for aged care providers to mention values in their mission statement. Our experience and feedback demonstrate that BCR goes far beyond that, including those who connect with us or visit our sites and centres, who are often impressed by how much we live and breathe our values. This has been a strategic decision for BCR, and we attribute this decision to enabling the work of this project. Some of the strategies we rolled out to engage and lead our teams to act on our values prior to the commencement of this project include:

- Using our rebrand development to engage our teams including BCR care staff and volunteers from across the organisation in brainstorming and documenting the behaviours which best reflect our values.
- Using the results of engagement sessions with care staff to develop an employee recognition program.
- Development of an Employee Value Proposition to understand why people within our communities are attracted to work for (and decide to stay) with BCR.
- Values-based recruitment at all levels, from frontline care workers to Executive and Board positions, with BCR Values underpinning all position descriptions.
- Creating an environment where belonging and connection at work can flourish. This is something that is highly valued at BCR, and has enabled the development of safe and trusting relationships and highly engaged cross-functional teams. Positive team relationships underpin daily operations, not just our collaborative events or projects.

- A deliberate focus on psychological safety. This helps with practical elements of operations like open disclosure and feeling safe enough to report on emerging or current concerns or issues to keep people safe and our values and culture intact.

This commitment to mission and values motivates us to find creative solutions when we experience challenges or when an innovative idea could keep us working towards our goals.

What is it that our community members' value?

The Royal Commission into Aged Care Quality and Safety Final Report (Commissioners G Pagone, L Briggs, 2021) projects that around 1.5 million people in Australia will be 85 years or older by 2058. The report raises concerns that both older people and the workforce that supports them are generally undervalued, and that often older people feel isolated, lonely and bored.

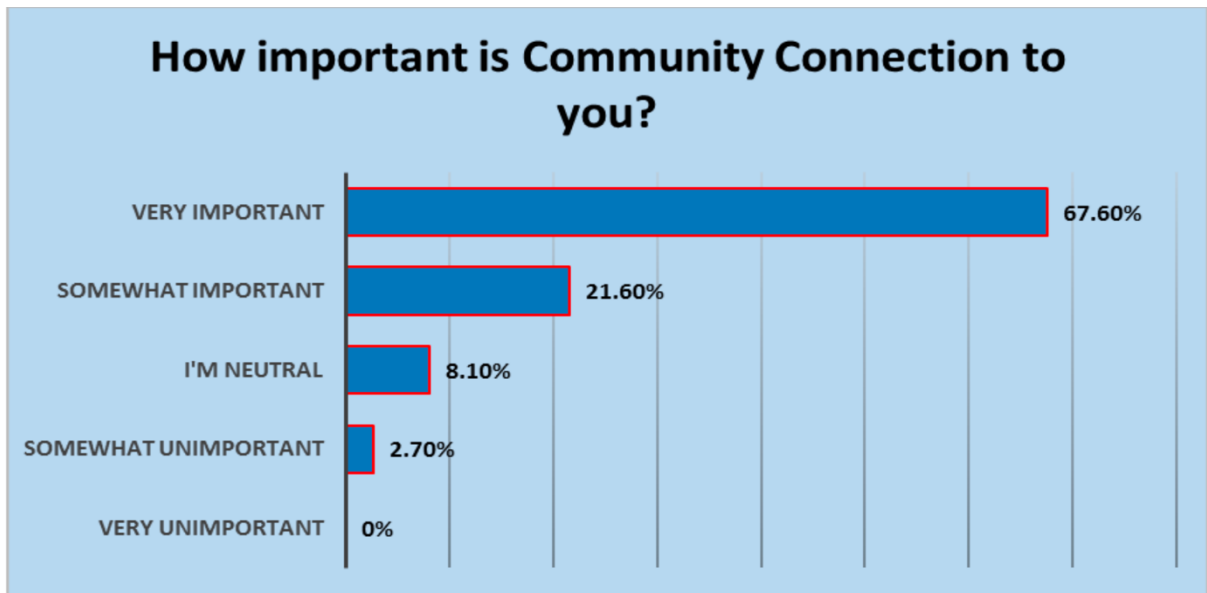
As Brian Harvey, a resident of Southern Cross Care Tasmania said: *I can confirm that we, the ancient ones, cry out to be treated as adults who have lived useful lives, had wide ranging experiences, and contributed to our communities and society. Non-mobile residents need a flexible array of choices of ways to spend time left to us in these declining years. Otherwise, the truly boring void of passing time finally makes death a preferred option.* (Commissioners Pagone, Briggs, 2021, p. 28)

At BCR, the focus on supporting people to be connected to, and a valued member of the communities in which they live drives its vision, mission, strategy, culture and operations. This Regional Provider Blueprint helps to support the recommendation of the Aged Care Commission that older people should be recognised as a person with a past, a present and a future and to be valued for who they are.

A survey conducted by BCR and ExSitu during this project included questions about social connection. It reinforced the notion that aged care supports should not be viewed in isolation of other supports, and that informal community networks help people live more connected lives. In a report by Community Circles Australia, voice and visibility through circles of support helps older people feel safer and more confident to remain living well at home. The recommendations included increased community connection, safety, social prescribing and technological innovation (Meredith Coote, 2022).

An unintended outcome, was the inclusion of family and friends in activities using a 'fee for service' arrangement which not only met the wishes of our clients, it also created a new income stream and potential pathway into our funded services.

This Blueprint seeks to provide information on the pathways we identified through a values-driven workforce and values-based supports to identify and capture what (and who) older people value. BCR and ExSitu were able to deliver on this outcome by harnessing the ideas and commitment of a human rights based, person-centred project team and supporting workforce, and the use of innovative technology.



The results above are based on survey of 107 BCR Communities CHSP funded Social Support Group (SSG) clients in December 2023.

Project Activities - Engagement

We captured individual interests and developed strategies and social activities to connect people into activities which aligned to those shared interests. BCR understands the importance of encouraging people who receive services within their own homes and becoming socially isolated to be more connected and visible within their communities. The Australian Institute of Family Studies (AIFS) published a research report on the risk factors associated with elder abuse. In this report, older people with less contact with family members and friends and a lower sense of social support were associated with an elevated likelihood of experiencing elder abuse (Lixia Qu, Rae Kaspiew, et al, 2021).

BCR created a new Lifestyle Activities Team with Lifestyle Officers who were passionate about creating values-driven and person-centred activities for greater social connection.

Examples of activities clients wanted based on the BCR survey:

- Technology Workshops
- Movie Club
- Book Club
- Art Gallery Tours
- Op Shop Tours
- Lunch / Picnic Groups
- Live Theatre Group
- Bus Trips
- Ten Pin Bowling Group
- Nature Tour Group
- Cafe Tours
- Museum Tour Group
- Dog Walking Group
- Fishing Group

Strategy in action: BCR - Building Connected Resourceful Communities



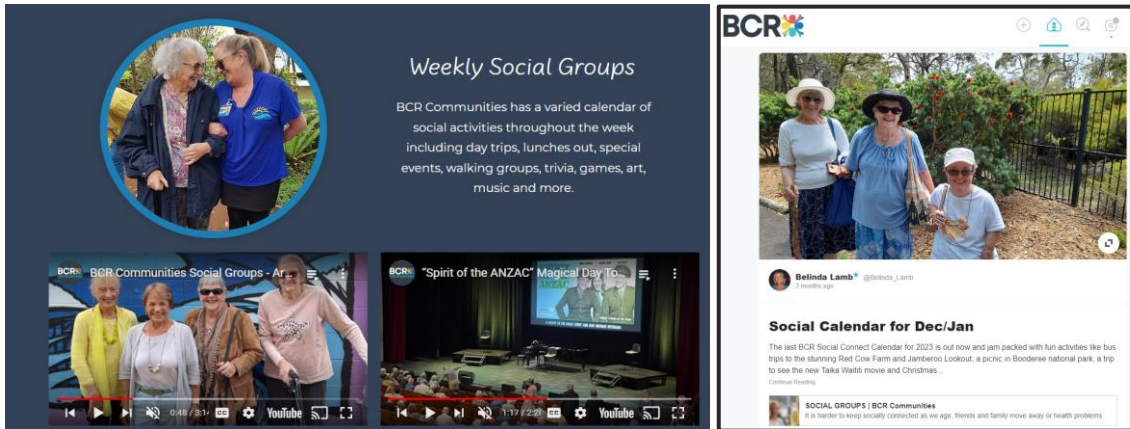
BCR and Partners (much loved) Intergenerational Programs



Our Thrive Together Fair – Connecting People and Community



Reducing Social Isolation through Fun and Friendship



Sharing Social Stories through our new 'BCR Communities' App



Building Connected Resourceful Communities – celebrating recognition

Project Activities - Empowerment

Dignity of risk means that a person has the right to live the life they choose, even if those choices may involve some risk. A provider's role is to provide support and information so older people can make informed choices about their care and services, and can live the life they choose.

The Charter of Aged Care Rights supports a person using aged care to:

- have their identity, culture and diversity valued and supported
- have control over and make choices about their care and personal and social life, including where those choices involve personal risk
- have control over, and make decisions about, the personal aspects of my daily life, financial affairs and possessions (ACQSC, 2024)

Aged Care Quality Standards

Standard 1 outcome is about being treated with dignity and respect, maintaining identity, and having the opportunity to make informed choices about care and services, and living a life of your choosing.

This standard includes recognising the importance of identity, culture and diversity, and each person's right to make informed choices and the right to take risks.

Standard 2 outcome is about being a partner in the ongoing assessment and planning that helps people get the care and services needed for health and well-being.

This standard includes informed decision making, understanding what is important to the person, and working out how their goals and preferences can be met including for advance care planning, completion of advance care directives and end of life planning in line with each person's preferences. (ACQSC, 2024)

This project explored opportunities to increase empowerment of people accessing BCR's in-home services including through:

- the development of a values-driven workforce
- the development of values-based care plans, and
- the ability to innovate and create efficiencies through technology

BCR wanted to create opportunities for empowerment early in our customer's journey. It was clear that first contact with BCR was all about information gathering to meet reporting requirements, rather than connect with the person and understand what is important to them. A client survey revealed that clients found our Care Managers friendly and helpful, but our processes cumbersome and repetitive.

During the project, we worked collaboratively to review and streamline processes including updating onboarding questions to make them more relevant, reducing repetition and making onboarding an online (rather than paper-based) process. This resulted in the care team and clients engaged in conversations which informed person-centred, values-based care plans.

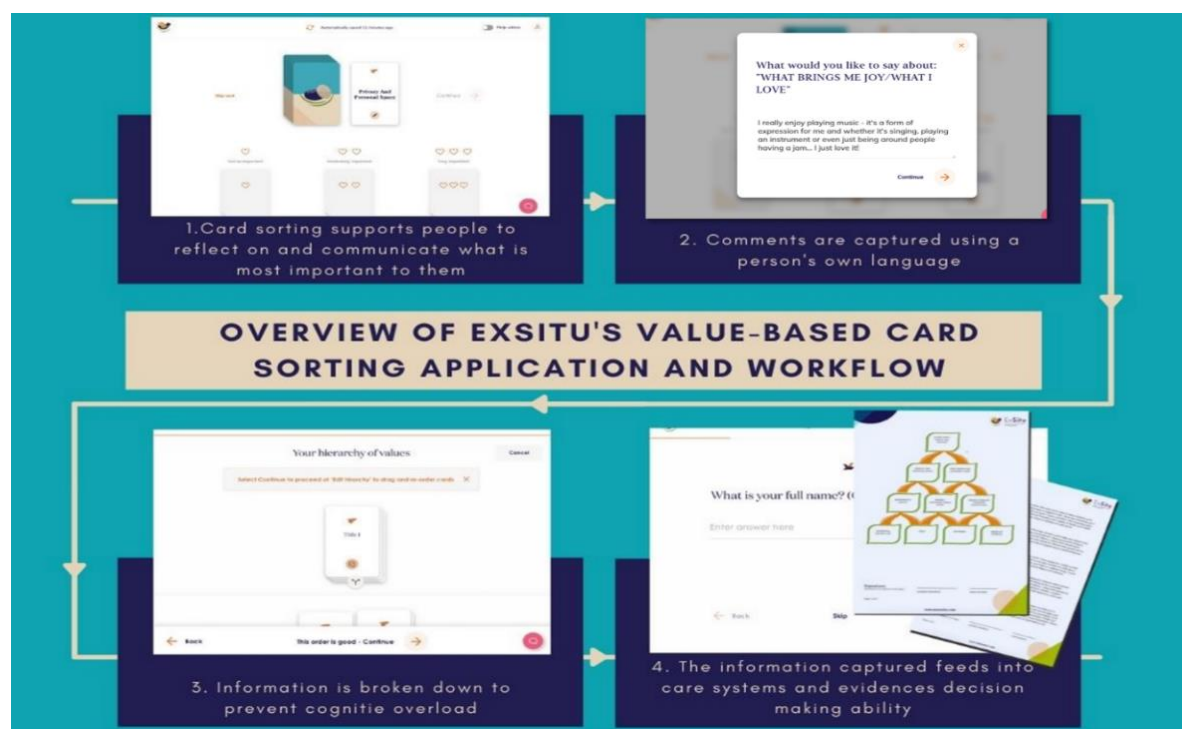
“How many times do I need to sign my name? I sign my name different every time and I can’t sign anymore as my hand shakes.”

Quote from client talking about paper-based onboarding process.

The BCR onboarding waitlist was cleared during the project due to the efficiencies created through a process of innovation and collaboration. The BCR Intake Team were now able to send links to documents and source information faster which was important for onboarding instances where case management was not funded. Streamlining the onboarding process not only made for a better client experience, it also saved one hour per client due to the efficiencies achieved.

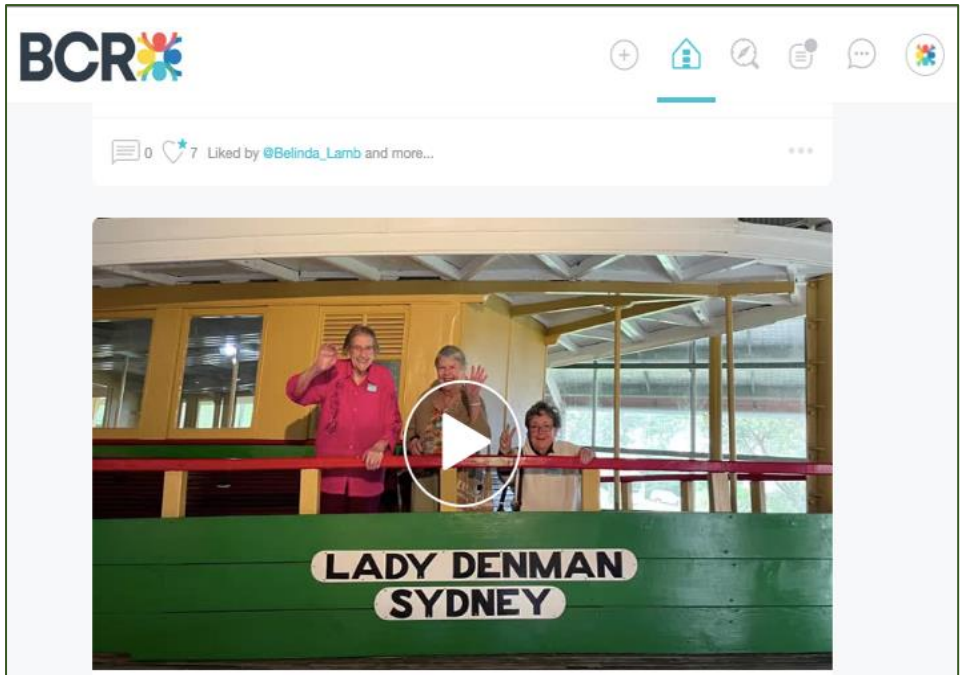
Project Activities - Technology

Supporting this improvement process was an award winning innovative technology ExSitu. ExSitu is a card sorting App designed to empower rights-based decision making and models of care through values-based care plans and advanced care directives.



Along with the use of innovative technology to improve client outcomes, BCR’s digitisation journey was also underway with development of systems and processes using the Microsoft 365 suite. IT equipment was also being installed in BCR sites and centres to enable hybrid (online/in person) aged care social support services to increase social connection.

The BCR Communities Online App created new levels of connection and reflection for BCR clients and their families and friends through the joy of sharing online stories, photos and videos.



“I just love looking back at what I did that day and showing my family”.

Quote from client talking about the online community app.

One of our assumptions in this project, was that BCR’s aged care communities would embrace the opportunity to connect with others online, and that through our online App we could develop hybrid (online and in-centre) activities to connect clients who due to ill health for example, were unable to attend social events and activities in person.

A lesson learnt in the development and delivery of the BCR Communities online app was the way clients used the platform. Our research showed that older people within our communities preferred to view the content of BCR Online Community in either private or with their family and friends, and ideally this was done in their own home and at a time that suited them. They were less interested in being connected via the BCR online app to a ‘live’ activity or event and connecting with others in this way.

Our research also uncovered that our clients were more likely to show or share content with family and friends rather than post a reaction - a ‘like’ or ‘comment’ for example when scrolling through content in BCR Online Community app. This changed our measures of success, which shifted over time from the number of likes and comments for each post, to a client’s increased level of engagement with family and friends and the joy of emotionally experiencing the activity or event again by sharing images and videos captured on the day.



Christmas Cheer for Friday Social Group!

Our BCR Communities Friday Social Group celebrated the end of the year with lots of Christmas cheer including a traditional lunch, games, carols and Christmas crackers. We hope everyone has a wonderful holiday and we look forward to seeing you all again in January 2024!

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A pivotal moment in our project



One of the project change management goals was to maintain high levels of engagement and consultation with teams across BCR. Ensuring that teams were consulted and could contribute to the research and findings was critical to the success of the project.

As part of this commitment, during the project we arranged a training day to demonstrate the new onboarding process to BCR Care Managers who had not participated in the initial trial. The training day included a session on Supported Decision Making (United Nations, 2024) with Michael Perkins, lawyer, author and educator with Autonomy First Lawyers.

During the session, BCR Care Managers raised questions about the need to understand and document values as part of the onboarding and review process. This was a pivotal moment for the whole team including the BCR Executive and Care Manager teams as Michael shared the importance of documenting values and the way they can be used as evidence when the capacity for informed decision-making starts to decline.

“Client’s keep asking me why I’m asking about their values. They don’t know what to say there. Why do we need to ask about values?”

Care manager during onboarding training just before session about the importance of documenting values to enable supported decision making

Michael challenged the team to consider the variables of the ability to make an informed decision against the complexity of the decision and its consequences. Ability and complexity are part of a continuum, and supported decision-making is about ensuring that a person can continue to make decisions for themselves where they can express an understanding of any consequences. The importance of documented values-based care plans is critical when a person has limited ability to make important life decisions and can no longer advocate for themselves.

“The courts will go looking for evidence of a client’s values”.

Response from Michael Perkins to a question about who should be making decisions on a client’s behalf

Our Human right to make a decision is our starting point

- This is irrespective of the ability of a person.
- Decision Making Ability and Mental Capacity are relative NOT binary concepts.
- Declaring a preference is NOT evidence of decision-making ability.
- The social façade of a person can be deceptive.
- How do we engage with clients in the first place?

 Autonomy First Lawyers



The ensuing discussions about supported decision-making included many real and current examples, it raised complex issues and challenges, and also demonstrated how supported decision-making is not only critical to, but also entwined within areas of legislation and provider obligations in the delivery of high-quality, rights-based, person centred care.

The team discussed the challenges of being the advocate for clients and supporting their right to make decisions when *family are very involved* in decisions regarding their family member’s care, through to those who have *no family* or circle of support and prefer to live their lives completely independently regardless of their level or rate of decline.

BCR Care Managers raised many examples of the tension between duty of care and dignity of risk. Despite trying to support the wishes and decisions of clients, it can be very challenging when balancing these wishes against potential risks on the person’s health and wellbeing.

The Executive discussed how proposed changes to the Aged Care Act, and in particular the responsibilities and penalties related to the decisions and actions of key personnel including volunteers (Commonwealth of Australia, 2023, p. 75) may make providers and their teams even more risk averse when trying to balance supported decision making/dignity of risk with duty of care, and the associated potential personal, professional and organisational risks.

In response to the concerns and challenges raised, the group agreed that documenting a person’s wishes and values not only helps to advocate for, and/or defend a decision, but also ensures that the person is being heard through to the end of their life. Being seen and heard at every life stage is important not only for decision making, but it also reduces the risk of loneliness, isolation, and the commonly recognised physical, financial, emotional, sexual abuse and neglect experienced by older Australians (Council of Attorneys-General, 2023).

National Plan to Respond to the **Abuse of Older Australians** (Elder Abuse) 2019–2023

SUPPORTED DECISION-MAKING

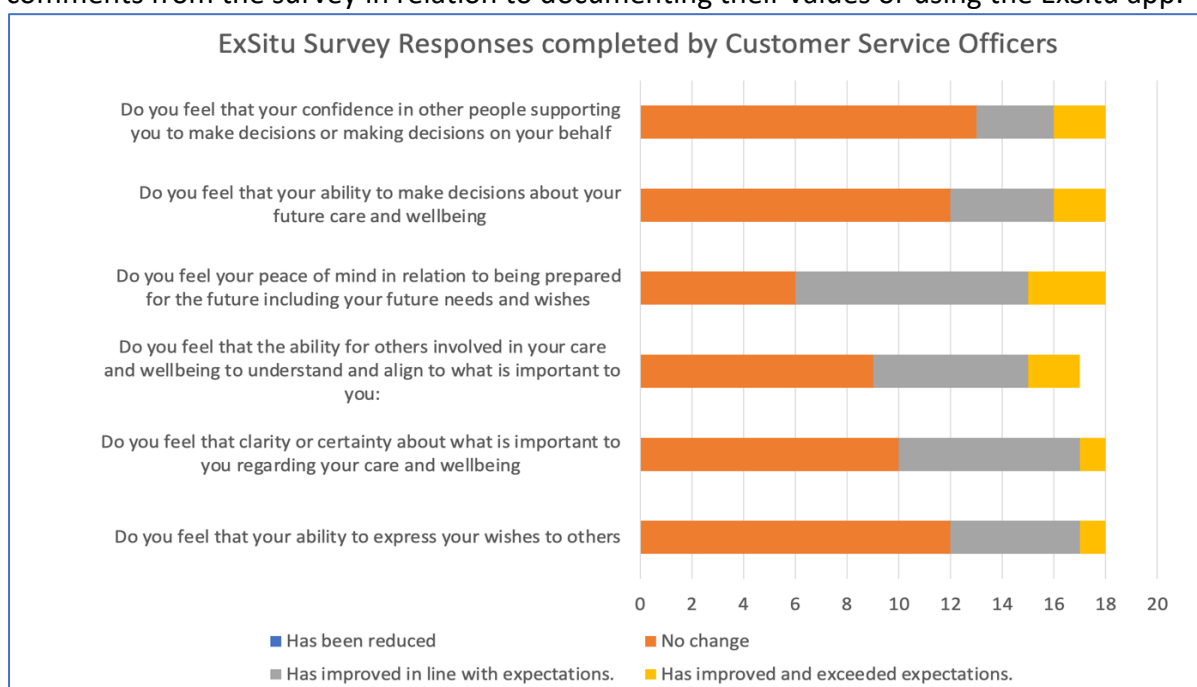
This encompasses a range of processes to support individuals to exercise their legal capacity. These may consist of:

- effective communication, including providing information and advice to a person and ensuring that a person is able to communicate their decision to others
- spending time to determine a person’s preferences and wishes
- informal relationships of support between a person and members of their social networks
- agreements or appointments to indicate that a relationship of support exists, and
- statutory relationships of support—whether through private or court/tribunal appointment.

(Council of Attorneys-General, 2023, p. 26)

What did BCR clients say about documenting their values?

BCR worked with Carers NSW to develop a retrospective survey to identify and better understand what clients thought about the process of documenting their values using the ExSitu app. Of the 18 clients who completed the survey, feedback ranged from neutral to positive. Clients who indicated that the process had a positive impact were also more likely to have added their personal comments to the questions. BCR did not receive any negative comments from the survey in relation to documenting their values or using the ExSitu app.



On reflection, BCR learnt lessons regarding the way we communicated information about ExSitu including the values documentation process and what the intended outcome was from the experience. One family member noted that had she realised that the process included end of life decision-making, she would have asked her sister to support their Dad in the process as *“She is better at that sort of thing”*.

“Mum said someone is coming out to talk about her will”?

Direct quote from a loved one of a client who was confused about what BCR staff were going to talk about

“I feel confident that my wishes will be respected.”

“I just found it great, especially for people who can’t communicate well, the one on one help is so very helpful.”

“It has had a positive impact and now that it's done, is able to ensure family have copies. It feels much better knowing her wishes will be respected.”

“It was good and important, gave peace of mind by completing it”

Our learnings

Supported Decision Making Authority and Assumptions

When initiating the new onboarding tools and processes, we realised the importance of the role and responsibilities when completing the 'authority to act as an advocate' section. It was the implications of completing this part of the care plan which triggered the initial training.

The key takeaway from the training session with Michael Perkins from Autonomy First was that capacity is not black and white. Autonomy in decision-making should be supported as part of a continuum, in line with a person's capacity to express an understanding of the risks and consequences of that decision. Just because a Power of Attorney (POA) or Enduring Guardian (EG) has been put into place does not mean it is active, or that all decisions should be made or directions taken from persons allocated these roles.

Complex decisions which are difficult for an older person with declining decision-making capacity can be referred onto the POA or EG where the persons wishes and values have not been documented or are not clearly stated. When supporting older people to document how they wish to experience their end of life, it's not just what they value but also who they trust. It is vital to engage with the expectations of clients and work from their perspective. In accordance with this view, Practicing the Ethics of Care (Gilligan, 2011) should be a foundation discipline within the operation of our care workforce.

Care Management in Practice

There is a need to properly understand the scope of challenges. A values-driven workforce wants to be able to make a difference and get involved in helping people live their best possible life. BCR Care Managers sited complex cases including supporting an older person with mental health challenges, and supporting health and wellbeing with someone who is impacted by their own hoarding and squalor while delivering their care needs and wishes.

Complexities with clients often relate to multiple vulnerabilities which includes older people becoming progressively more isolated including through a diminishing circle of support. For Care Managers, as well as trying to partner with clients to expand their circle of support, there is the boundaries aspect to manage too. It is challenging to operate in an ethical, moral and values-driven way while constantly maintaining professional boundaries. The aged care workforce requires well-informed, values-driven education and training including practical tools to manage professional, ethical and supported decision-making boundaries.

The care workforce should feel psychologically safe and supported. One way to do that is to develop systems and processes so they have well-understood and documented boundaries and decision-points. This will help in those more complex cases where Care Managers face the dilemma of a decision which needs to be made where no circle of support exists and the question of "If not me then who?" arises. Clearly-defined boundaries and decision-points gives care teams the confidence to explore new or innovative ways to support their highly vulnerable clients, and also provides the framework to know when they should pass decision-making on to official delegates – appointed Enduring Guardians for example.

Our opportunity to model care based on human rights

BCR is a regional, values driven, not for profit in-home aged care provider operating for over 30 years. Our care management team have not been employed as brokers to procure transactional supplied goods and services to our home care clients. Our high-quality care management service is dependent on our dedicated Care Managers developing an understanding of each person we support including who they are, what is important to them, identifying their needs, and partnering with them to meet their defined goals and outcomes.

To do their job well, all Care Managers need to be highly skilled with expert knowledge and a deep understanding of care management. If we professionalised the Care Manager role, employers would need to ensure their staff were accountable to a range of attributes. The following quote from George Beaton's paper 'Why professionalism matters more than ever' (Beaton, 2022) illustrates a range of objectives that if followed, will help us bring the operation of Care Managers practicing the Ethics of Care up to a professional standard:

'For professionals, delivering competence, care and results relies on being up to date, free from distractions, well supported and motivated to help. For educational institutions, it relies on inculcating appropriate values and lifelong learning abilities. For regulators, it relies on the high standards of accreditation, continuing education and transparent prosecution of transgressions. And for professional associations, it relies on members working collaboratively to contribute to the public good and the profession's standing' (Beaton, 2022, p. 30).

Implementation of rights-based decision making is occurring within Australia at an accelerating rate. The social compact that defines Australian society is being shaped by the Australian adoption of the UN Convention on the Rights of People with Disabilities and the International Covenant on Economic, Social and Cultural Rights in the implementation of the new rights-based Aged Care Act currently in development by the Federal Government.

The new Aged Care Act is a means to implement right based decision making beyond the fields of Health and Disability. Chapter 1 of the current Exposure Draft of the Aged Care Bill (Commonwealth of Australia, 2023) challenges our workforce to distinguish our client's response to a person's objectives in exercising their decision-making rights. This means the sector will need to develop and deploy revised client interviewing and case management processes to ensure rights responsiveness is an operational attribute of our workforce.

Conclusion and future opportunities

Through our research learnings and by taking a values-based approach to our workforce training, we believe we can accelerate the formulation of reliable methods to support person-centred, rights-based decision making not only within aged care services, but also with relevant and appropriate professional services. These methods can then be used to anchor the collaboration of professionalised in-home-aged-care Care Managers with external professional service providers where these providers are involved in meeting a client's care needs and wishes through collaborative values-driven supported decision-making practices.

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