

Talking about taxation Small steps towards reform

In October the federal government convened a Tax Forum ‘to discuss priorities and directions for further tax reform’ with representatives from community groups, businesses, unions, and governments, as well as academics and tax practitioners (Australian Government 2011). The Brotherhood of St Laurence was represented at the forum by Nicola Ballenden, General Manager, Public Affairs, who reflected on the event for Brotherhood Comment:

The tax and transfer system plays a role in all of our lives and influences many important decisions. Where to live, how to invest, how much we should work, whether and when we should retire, how much time we should spend out of the workforce rearing children, whether to use child care and even how much we drive our cars can be decisions that are influenced by the tax system.

The Brotherhood has a long history of campaigning for a tax and transfer system that is equitable and helps disadvantaged people to build a good life for themselves. In the three years since the Henry Review of taxation was announced, our submissions, research projects, opinion pieces and media articles have covered a range of tax and transfer issues that affect disadvantaged people: inequitable tax breaks for housing and superannuation, the need to improve incentives to work and build assets, the adequacy of income support and the importance of subsidies to encourage the participation of disadvantaged children in child care. We were keen to participate in the Tax Forum, to make sure that such vital issues were heard by key government decision makers.

In spite of accusations from the media that it was an expensive ‘talkfest’ without outcomes, the tax forum exceeded expectations. Two days, two hundred participants keen

to have their say, and numerous complex public policy issues meant that the agenda was very crowded. Several important topics were barely discussed—family payments and childcare subsidies, for example—while others such as the demographic time bomb of an ageing population, the corporate tax rate, and whether or not Australia is a high-taxing country were discussed at length.

Business groups had proposed that a cut to the corporate tax rate be funded by an increase in the GST—a proposal that community groups opposed. The ACTU favoured lifting the tax-free threshold to \$25,000 as the Henry Review had originally proposed. The issues of negative gearing, inequitable tax breaks for

superannuation and the inadequacy of Newstart also got a fair airing.

While highly controlled, the conversation was considered and polite; people backed up their arguments with evidence; and many participants really knew what they were talking about—which is all as it should be. While some dismiss these issues as dry and technical, the tax and transfer system is a key pillar of our public policy infrastructure. It expresses the type of society we want to be. It should, as Ken Henry said in his address, be subject to informed public debate.

Despite the modest expectations, some concrete decisions were announced:

- The government intends to further increase the tax-free

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threshold to at least \$21,000, which would free over a million people from having to complete a tax return. This will be done when it is affordable.

- A business tax reform working group will look at business taxes and their impact on Australia's patchwork economy, and report back in March.
- The Commonwealth will contribute \$1 million annually to create an independent Tax Studies Institute as a centre for research excellence.

While these are small steps, the process of tax reform is a long one. It was never going to be sorted in a two-day forum. Reform will also be contentious, for as Ken Henry said there will always be articulate vested interests arguing that they may be worse off. Also, big ideas always take time and lots of public debate before they can be implemented. For advocates of policy change, Henry gave reason to hope that an inclusive process of discussion and awareness building is more likely to produce effective policy results than a dramatic official announcement:

Good policy outcomes are much more difficult to secure where visionary ideas, big challenges and creative approaches are floated for the first time in the announcement of a policy decision. The better outcome will usually be achieved when the visionary idea is so well accepted that it seems banal; where the challenges are so broadly accepted that everybody is worried

sick by them; and when approaches to dealing with those challenges appear merely natural (Henry 2011).

At the Brotherhood we will keep working for such better outcomes in the form of an Australia free of poverty.

Note:

The Brotherhood's priorities for tax reform and related recommendations are available on our website.

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Recent policy submissions

Submissions or statements made by the Brotherhood of St Laurence in the last year include:

- Submission to the National Advisory Council on Mental Health regarding 'Daily bread, income and living with mental illness', August 2010
- Submission to the Treasury's National Credit Reform Green Paper, August 2010
- Submission to Australian Communications and Media Authority (ACMA) Reconnecting the Customer consultation, September 2010
- Submission to Senate Economics Committee Inquiry into competition within the Australian banking sector, November 2010
- Response to ASIC consultation on telephone sales for general insurance, December 2010
- *Line of sight: better tailored services for highly disadvantaged job seekers*, submission to the Australian Government on future employment services from 2012, January 2011
- Response to the Productivity Commission's Early Childhood Development Workforce issues paper, January 2011
- Response to the Productivity Commission draft report *Caring for older adults*, March 2011
- Submission to Commonwealth Review of School Funding, March 2011
- *Maximising the positive economic, social and cultural impacts of migration*, submission to the Inquiry into Multiculturalism in Australia, April 2011
- Joint response to *Reforming flood insurance: clearing the waters* discussion paper, by the Brotherhood of St Laurence, Choice, Consumer Action Law Centre, Financial Counselling Australia, Footscray Community Legal Centre, Insurance Law Service at Consumer Credit Legal Centre NSW & National Legal Aid, May 2011
- Submission to the Department of Treasury and Finance Review of the Advanced Metering Infrastructure Program, June 2011
- Submission to the Essential Services Commission Vocational Education and Training Fee and Funding Review, June 2011
- Response to the Australian Communications and Media Authority's draft public inquiry report *Reconnecting the Customer*, July 2011
- Submission to the Natural Disaster Insurance Review: improving access to insurance for low-income Australians, July 2011
- Response to the Productivity Commission's Early Childhood Development Workforce draft report, August 2011
- Submission re Whole of Government Victorian Alcohol and Drug Strategy, September 2011

Policy submissions can be accessed on our website.

Brotherhood Comment is published three times a year by the Research and Policy Centre of the Brotherhood of St Laurence.

The Brotherhood of St Laurence works not just to alleviate but to prevent poverty, focusing on people at the greatest risk at key life transitions. It is a national voice on matters of disadvantage, understanding that poverty's remedy lies in integrating social and economic policy so as to strengthen the capacities of individuals and communities. Its research, service development and delivery, and advocacy aim to address unmet needs and translate the learning into new policies, programs and practices for implementation by governments and others.

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From the General Manager

To be researching social policy at the Brotherhood of St Laurence today is to experience a massive conundrum. National social policy debate can be very frustrating. So often it does fit the popular stereotype of superficial party posturing for the 24-hour media cycle and lacks any sense of grand narrative. On the other hand, we find in contemporary Australian social policy research communities a breadth and depth of inquiry and dialogue not seen for nearly two decades. In our front page report from the tax forum Nicola Ballenden points to the policy gains that can be had when the process allows for open and robust dialogue between the interested parties.

The new substratum of progressive social policy thinking in Australia was abundantly evident to us at the Brotherhood and University of Melbourne's roundtable, 'Inclusive growth in Australia', held in October. Participants came from several universities, the Business Council of Australia, the Australian Council of Trade Unions, the Australian Council of Social Service, the Commonwealth Public Service and the Productivity Commission. It proved an exhilarating exploration of the ways in which we need to better connect economic policies for boosting productivity and participation with social policies to make growth more inclusive, if we are to make the most of the historic opportunity being created by the mineral boom. The presentations are available from our website.

Also on display at the roundtable was our breakthrough project in monitoring disadvantage: the collaborative BSL-Melbourne Institute Social Exclusion Monitor (SEM). After trialling with diverse user groups, the Social Exclusion Monitor has been added as a new section to the Brotherhood's website. This innovative material,

which combines graphs and data tables with headline statistics and personal stories, explains how we measured exclusion, describes who experiences exclusion, and shows the depth and persistence of exclusion over the past decade. Already SEM evidence has been used to powerful effect in comparing and contrasting populations of the income-poor and the socially excluded.

Dissemination of the research findings from the Social Exclusion Monitor has also included the publication online of the first *Social Exclusion Monitor Bulletin*. The bulletin will cover the key trends as new data from the national HILDA panel study dataset is analysed.

A hot issue

Over recent years the Brotherhood has invested heavily engaged in the hotly contested issues surrounding climate change. In this issue Damian Sullivan writes about the work we are planning for policy beyond the carbon price itself. He highlights the latest developments in responding to climate change, energy efficiency and the related but complex issue of rising energy prices, with a focus on minimising the impact on disadvantaged households.

Across the life course

A lot of the exciting social policy innovation is associated with adapting to the changed or 'stretched' life course. In this issue, Janet Taylor's retrospective piece reflects on the longitudinal Life Chances Study and Sharon Bond considers policy responses to the complex barriers which prevent some young people from engaging successfully with education; while the interaction between alcohol and drug use and other forms of disadvantage in the lives of some young people is the focus of Joseph Borlagdan's article. Finally Simon Biggs reminds us of the value in

building better understanding between generations in his discussion of a recent collaborative project between the Brotherhood of St Laurence, the National Ageing Research Institute and YouthWorx, with support from the Lord Mayor's Foundation, involving interviews of youth and older adults.

Major projects

Two major projects have reached important milestones in recent months. The report from the national evaluation of the Home Interaction Program for Parents and Youngsters (HIPPY) undertaken by Monash University with support from Tony Barnett, Fatou Diallo Roost and Juliet McEachran of the RPC, has recently been submitted to the Department of Education, Employment and Workplace Relations.

Research partnerships

We are pleased to be hosting Dr Iris Levin as the postdoctoral fellow working on *The Relocation Tool Kit*, an Australian Research Council-funded study led by Dr Kathy Arthurson and Dr Anna Ziersch at Flinders University in South Australia. The Brotherhood is an industry partner in this project about strategies to minimise negative impacts of public tenants having to relocate during the refurbishment or redevelopment of social housing.

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Rising energy prices Causes and opportunities

As the Australian Government's Clean Energy package becomes law, the Brotherhood's Equity in Response to Climate Change team is renewing our focus on energy affordability and adequate support for energy efficiency in low-income households. An important task is to disentangle the factors driving up energy prices and identify some of the opportunities to ensure energy remains affordable for all.

The nature of the problem

In recent months, rising energy prices and the cost of living have remained a flashpoint for media concern. Retail energy prices are projected to increase by around 100 per cent from 2008 levels by 2015 (Simshauser, Nelson & Doan 2010). While some continue to blame the carbon price, a closer look shows the main drivers of rising energy prices lie elsewhere. The carbon price will certainly lead to some increase in electricity prices; however, its effect is small relative to other factors, most notably increasing infrastructure costs. Further, unlike other components of energy prices, the carbon price will be accompanied by a comprehensive household assistance package (see *Brotherhood Comment* August 2011).

The media attention has obscured the reality that for many households while energy prices are rising, incomes are also rising and the share of weekly expenditure on energy remains low. However, as Sims (2010) notes, rising energy prices are a more significant issue for low-income households who spend a higher proportion of their weekly income on energy than wealthier households. Economists from energy company AGL have pointed out that unless the rising costs are addressed an increasing number of households will struggle to pay their energy bills (Simshauser, Nelson & Doan 2010).

Rising energy bills do not exist in isolation—households have to manage their energy bills along with their weekly food, rent or mortgage and other bills. It is not surprising, then, that private renters are overrepresented among households facing hardship in paying their energy bills. The pressure on household budgets is compounded by energy billing cycles, with quarterly bills often difficult to manage, particularly for the winter quarter. Fortnightly payment systems, notably Centrepay, provide a useful and increasingly popular budget management tool for low-income households.

Recipients of Newstart Allowance and similar benefits are one group highly vulnerable to rising energy prices, as they receive a lower weekly payment—\$244 per week for a single person—than the pension and, unlike pensioners, do not receive the Commonwealth utilities supplement. Further as Newstart is pegged to the CPI, when energy prices increase (as they have) above the rate of CPI, these households fall behind. Fixing the issues for Newstart recipients goes beyond providing them with the utilities supplement. As identified during the recent tax forum there is a clear need to raise the level of Newstart and to modify the indexation to be in line with the indexation of the pension. Other vulnerable groups include households with particularly high energy consumption, new arrivals to Australia who are unfamiliar with our energy market and low-income working families who are not eligible for some energy concessions.

Primary drivers of rising energy prices

The Australian Energy Market Commission (AEMC 2010) recently estimated that close to 50 per cent of electricity price increases across Australia in the

next three years will be driven by investment in distribution and transmission infrastructure. This largely reflects growing demand for electricity, particularly on a small number of high energy usage days (for example, during heatwaves), and the need to replace ageing infrastructure. Among the states, Victoria remains something of an anomaly, with increasing retail costs driving over 61 per cent of price increases and smart meters driving a further 21 per cent (AEMC 2010). Leaving aside the somewhat obscure cause of the Victorian price increases, expenditure on energy infrastructure across Australia to service new areas and upgrade out-of-date poles and wires is not contentious. However the extent of the price increases is increasingly being contested.

The system for setting distribution prices needs to be reviewed. To this end, the Australian Energy Regulator (AER) has recently submitted a proposal to the AEMC, to change the rules for determining energy distribution price increases. The AER argues that the existing rules promote overcapitalisation of infrastructure, favouring the energy distributors over consumers. If successful, the case will provide an opportunity to swing the balance back towards energy consumers. If the AEMC decides in October to act on the AER proposal, the Brotherhood of St Laurence and other interested parties will have an opportunity to make submissions to the AEMC.

The increasing peak electricity demand also needs to be addressed. Much of our electricity infrastructure expenditure occurs to service a small number of days with high peak demand each year. These days of peak demand require all our energy generation and distribution capacity. Multiple measures will be needed to reduce or offset peak

Recipients of Newstart Allowance and similar benefits are one group highly vulnerable to rising energy prices.

demand and therefore reduce the price increases. One important approach is a National Energy Savings Initiative—an obligation for energy retailers to reduce the carbon emissions of the households they service. Similar schemes which operate successfully in Victoria, New South Wales and South Australia, along with the United Kingdom and many European countries, have reduced both overall energy consumption and peak demand. The Brotherhood has been a vocal advocate of an Australian NESI with appropriate measures to ensure low-income households are able to share in the benefits. To date the Commonwealth Government has only announced a timeline for a decision on an NESI.

Household level opportunities to limit energy costs

Along with the systemic challenges, there are opportunities for individual households to reduce their exposure to rising energy prices.

Much of the Brotherhood's work has focused on helping individual households with energy efficiency. Residential energy efficiency provides an important buffer for individual households to limit the rising energy costs, by enabling them to get greater amenity from the energy they use for heating, cooling, washing, etc. The NSW Home Power Saver Program, for example, estimates households can save over \$200 per annum from a simple audit and retrofit, provided free to low-income households. Such programs provide essential support for basic energy efficiency measures. However, many low-income households are also locked into reliance on highly inefficient, capital-intensive items, such as electric storage hot water services, electric heaters and old refrigerators.

The Commonwealth's forthcoming \$100 million Low Income Energy Efficiency Program (LIEEP) will provide a useful opportunity to trial 15 to 20 innovative methods to increase energy efficiency. While valuable, LIEEP will only connect with a small number of the low-income households who need assistance. Larger Commonwealth-funded programs supported by state and local governments and community organisations will be needed. If implemented, an NESI will provide some incentive; however further support will be needed for many low-income and disadvantaged households.

A complementary approach is to assist households to pay their bills by granting an energy bill concession. The Victorian Government recently extended the 17.5% winter energy bill rebate to a full-year rebate—welcome news for pensioners and other concession card holders. Other states have also increased their household energy concessions. As prices rise, it will be interesting to see the budgetary impact of these arrangements, particularly in Victoria where the government's liability is uncapped. Importantly some low-income working people are likely to miss out on this concession because they are ineligible for a concession card.

The competitive retail energy market also provides opportunities for households to reduce their energy bills, along with some important risks. High energy consumption households who switch to the best retail energy market offer may save between \$350 and \$550 per year, depending on their area (St Vincent de Paul 2010). Unfortunately, for many households it is difficult to know which contract is most suitable for their needs. Limited energy literacy across the community, combined with a lack of transparency in energy

bills and aggressive marketing practices, compounds the problem.

Navigating Energy Markets, a pilot program conducted by the Brotherhood of St Laurence in the City of Yarra, trained existing community sector workers to understand energy markets and energy affordability in order to improve the outcomes for their clients. The pilot showed a high level of need and the potential to better integrate within existing community service providers an understanding of energy cost savings possible for low-income consumers. The Brotherhood is using this experience in consultations with the Department of Families, Housing, Community Services and Indigenous Affairs which is developing a \$30 million Home Energy and Financial Sustainability program to address the linkage between financial sustainability, financial literacy and energy.

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The Brotherhood has been a vocal advocate of an Australian National Energy Savings Initiative with appropriate measures to ensure low-income households are able to share in the benefits.

The Relocation Tool Kit project Policies to enhance residents' health, wellbeing and social inclusion

As in other developed countries, large public housing estates in Australia were mainly built in the period following the Second World War. Since then, underinvestment and limited funding for new housing have led to the deterioration of housing stock. The need to manage housing with decreased funding has motivated state housing authorities to participate in urban regeneration projects. This usually means trading off stock numbers for fewer housing units of improved quality (Arthurson 2001; Baker 2008). In Victoria, 12 estates are currently undergoing redevelopment to improve their physical assets and neighbourhood environment (Office of Housing 2011). Such projects often involve the forced relocation of tenants to other public housing estates. The impacts of this process are not well identified in Australia and the topic is under-researched, despite its importance for achieving successful relocation (Baker 2008).

The Relocation Tool Kit project is following public housing tenants relocated due to redevelopment of the Carlton Housing Estate. It aims to conceptualise the impact of relocation and to evaluate the relative importance of key factors that change during the process. These factors might include changes to quality of housing, employment and social networks (social capital, family, friends), neighbourhood environments (reputation, social mix, access to services, crime) and the management model utilised during relocation (resident involvement, community consultation processes).

The Brotherhood of St Laurence has undertaken research on public housing issues since the 1940s. Early research focused on homelessness, housing standards and the role of public housing in the redevelopment of inner-urban areas. In the 1960s it shifted to exploring the problems

engendered by public housing authorities' high-rise building policies. Recent research has continued into housing affordability, the interaction of housing and other aspects of inclusion or exclusion in Australian society, and innovative projects focused on public housing tenants (BSL 2009, p.6). The current study, led by Dr Kathy Arthurson and Dr Anna Ziersch from the Southgate Institute for Health, Society and Equity at Flinders University, is a partnership with the Brotherhood of St Laurence and VicHealth. The Relocation Tool Kit project is funded by an Australian Research Council Linkage grant and VicHealth, and is managed by Dr Iris Levin, a post-doctoral research fellow based in the Research and Policy Centre at the Brotherhood.

The study will produce a tool kit that will assist policy makers and practitioners involved in tenant relocation to maximise the potential for positive impacts in terms of health, employment and educational opportunities for some of the most disadvantaged population groups in Australian society.

The rationale for the study

Tenant relocation policies have potential impacts on social, economic and health inequities for disadvantaged groups. Three key aspects identified in the literature are the quality of housing, local support networks and access to local services.

Relocation provides an opportunity to improve the *quality of housing*, which can improve mental health and general health outcomes (Kearns et al. 2006). However, the US literature suggests that if relocation is not done well moving home can cause grief; and affordability and security can be compromised, leading to greater hardship for already

disadvantaged population groups (Popkin et al. 2004).

It is thought that the process of relocation may also disrupt or improve access to *local support networks*, along with the employment resources gained through these networks. Socioeconomically disadvantaged groups appear more reliant than others on these networks for maintenance of their health and wellbeing (Ziersch 2005). Where supportive networks exist, there is some evidence that moving groups of residents together can substantially reduce the loss of these social networks and overall dissatisfaction with relocation (Arthurson 2002). Conversely, some research suggests that the establishment of new bridging or more diverse networks is also beneficial as it may provide access to resources not previously available, such as information about employment opportunities (Briggs 1998; Ziersch & Arthurson 2005).

While accessing *local services* seems more important for public housing tenants, given their limited financial resources and low levels of car ownership, only a few studies have investigated whether in fact relocation alters service accessibility (Fuller 1995). Internationally, some studies have found that services are often more expensive after relocation, and sometimes unavailable (Atkinson & Kintrea 2004). In some situations, levels of health care declined as it was more difficult to access doctors and hospitals (Ambrose 2000).

The research project adds to this body of knowledge by broadening the conceptualisation of relocation processes beyond these three principal factors. It also explores other factors including socioeconomic mix and neighbourhood reputation.

The tool kit will assist policy makers and practitioners involved in tenant relocation to maximise the potential for positive impacts in terms of health, employment and educational opportunities.

Increasing socioeconomic mix, for example, has become a popular strategy in the United States, and recently in Australia, to address place-based disadvantage. Its benefits in enhancing social inclusion, however, are largely unsubstantiated. In some housing estates strong cohesive communities existed prior to regeneration and thus the need for social mix has been questioned (Arthurson 2002, 2010). In addition, there have been few studies on the experiences of residents once they have moved back to the new mixed housing developments. One study of a new mixed-income development in Chicago reports that overall satisfaction among all income groups is quite high but there are barriers to interaction, such as physical design, stigma and assumptions based on housing, class and status (Joseph 2008).

Context and methods

The Carlton Housing Estate has been selected as the research focus. According to a baseline survey undertaken by the Office of Housing in 2006, the buildings in the Carlton Estate have not been upgraded since their construction apart from undergoing periodic maintenance. The redevelopment was prompted by the poor condition of the housing stock, mismatch of existing units with current and future client needs, inefficient use of the open spaces and ground-level parking, safety and security concerns, the area's bad reputation, and the need to address these issues while minimising government capital expenditure (Office of Housing 2009). Relocation of the tenants was completed in 2006, followed by the demolition of the 'walk-ups' (four and five-storey apartment blocks in the estate). Tenants have been moved to different locations around metropolitan Melbourne, with some staying in the estate's high-rise buildings. Redevelopment of the site

started in 2009 and the three new precincts will contain 246 public units and some 300 private units. The whole redevelopment includes new public parks, gardens and local services (Office of Housing 2011). The focus of this research is the first precinct, located between Lygon and Rathdowne streets, which includes 84 new public housing units and 90 private units.

The data collection component includes interviews with tenants, other stakeholders and policy makers; a focus group with surrounding residents; and a roundtable with policy makers to develop the Relocation Tool Kit. At this stage we have completed the literature review. Interviews will start before the end of the year with both tenants who have already returned to the new buildings in the redeveloped estate and tenants who have chosen not to return. The project started in April this year and is due to be completed at the end of 2013.

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Life Chances turns 21 Reflections on a longitudinal study

Beginnings

In the late 1980s child poverty in Australia was a key public concern, with Prime Minister Hawke promising that 'No child need live in poverty by 1990'. The Brotherhood at the time was undertaking a Child Poverty Policy Review and was also leading the national 'Promise the Children: Action Against Poverty' campaign in association with the Councils of Social Services. Research that followed what happened to children growing up in the 1990s was seen as timely to increase the understanding of child and family poverty over time. The Brotherhood's Life Chances study was developed during 1989 and was commenced in 1990 by Tim Gilley and colleagues.

The longitudinal study turns 21 this year together with its subjects. It started as a study of all children born in selected months in 1990 in two adjoining inner Melbourne suburbs, selected for the diversity of their residents. Families were contacted through the Maternal and Child Health Service which is notified of all local births. The families who agreed to take part ranged from recent refugees living in high-rise public housing to high-income professional couples living in renovated terrace houses.

The study collected both quantitative and qualitative data, exploring the factors which influenced the children's life chances. It began with detailed interviews of the mothers when the babies were about six months old. Later stages included fathers, teachers and the children themselves, with the young people's own views becoming more prominent as they grew up.

The study commenced with 167 babies. The families, including many who moved away from the inner suburbs, have been interviewed

at nine stages. The study is still in contact with some 140 families.

Family income

One focus has been the causes and effects of low family income. Throughout the study, the families on low incomes have included a higher proportion of parents with less than tertiary education, of those born overseas with limited English, of sole parents, of unemployed parents and of families with large numbers of children. These characteristics, especially in combination, have made it difficult for families to increase their income significantly. For example, over the first 12 years the percentage of low-income families decreased only slightly, from 30 per cent to 27 per cent. In contrast there was a considerable increase in the percentage of high-income families over those years, as those on middle incomes improved their position.

Some children lived on low incomes for relatively short periods, but others endured prolonged financial hardship. Three-quarters of the children who were living in families on low incomes at six months of age were still living in low-income families when they were 11 and 12-year-olds.

Stresses and social exclusion

The study highlighted the differences in the lives of the children in low-income families from those in more affluent families. When the children were six months old, the mothers on low incomes were significantly more likely than other mothers to report stressful life events such as their own major health problem, serious disagreements with their partners and serious financial problems. They were also more likely to say that they had problems managing their child, but less likely to receive help with their child from grandparents or friends.

Most of these differences persisted and were associated with social exclusion. Not only did the low-income families on average face greater stresses than other families, but also they continued to do so with less informal social supports and less use of services. As access to early childhood care became a focus of policy concern, the study found low-income families were less likely to use paid child care than other families at all stages. As three-year-olds, the children in low-income families were less likely to use local libraries or attend playgroups. At six and eleven, they were less likely than many of their more affluent peers to participate in out-of-school activities such as sport, music or dance. They were also more likely to miss out on activities at school, because of the cost of excursions, camps and swimming lessons, in spite of receiving the Education Maintenance Allowance. As 11 and 12-year-olds they were less likely to have computer or internet access at home, at a time when these were becoming a necessity rather than a luxury. At 18 those still studying were struggling to afford textbooks.

School engagement

From age 11, the young people themselves told us about their experiences of both school and home. With the increasing emphasis on school retention to Year 12 and diminishing full-time job opportunities for those without qualifications, school engagement became an important topic to explore. On average the young people were much less engaged with school at age 16 than at 11. Also at age 16 those from low-income families were less engaged with school than those from high-income families. Asked what they thought would improve school for them, young people who had grown up in low-income families replied: teachers having better control; more assistance for those having

Three-quarters of the children who were living in families on low incomes at six months of age were still living in low-income families when they were 11 and 12-year-olds.

difficulties with school work; assistance in planning their futures; and teachers who would listen.

Transition from school

At 17, while most of the young people were continuing to Year 12, we explored in detail the stories of eight young people who had left school between the ages of 14 and 16, primarily because of negative experiences. Their stories highlighted the importance of both improving the school experience for those at school and providing well-articulated support and positive opportunities for those who have left.

At 18, many had completed Year 12. As found in larger studies (for example Marks, McMillan & Hillman 2001), on average those from lower-income families did less well in their VCE results than those from high-income families. But the study also revealed some disadvantaged young people who did very well academically.

Outputs

The Life Chances Study has reached a diverse audience. *Life at six* has been used as a university text. Research reports have been published for each stage of the study, with the more recent reports available on the Brotherhood's website. Inspired by the UK *Seven Up* films, in 1994 the *Life Chances* film documenting the lives of seven families was made in partnership with Film Projects and was shown on SBS TV. It has been followed up with the recently released DVD, *Life Chances: turning 13, turning 18*.

Reflections

The diverse experiences of the children and families of the Life Chances Study provide a window into aspects of Australian society that are 'everyday' for some families but difficult to imagine for others, for example not having

internet access or going away on holidays. The study highlights the impact of low income but also the resilience of some families. It illustrates well the 'predictability qualified by complexity' found in other longitudinal studies of children's lives (Bynner 2001).

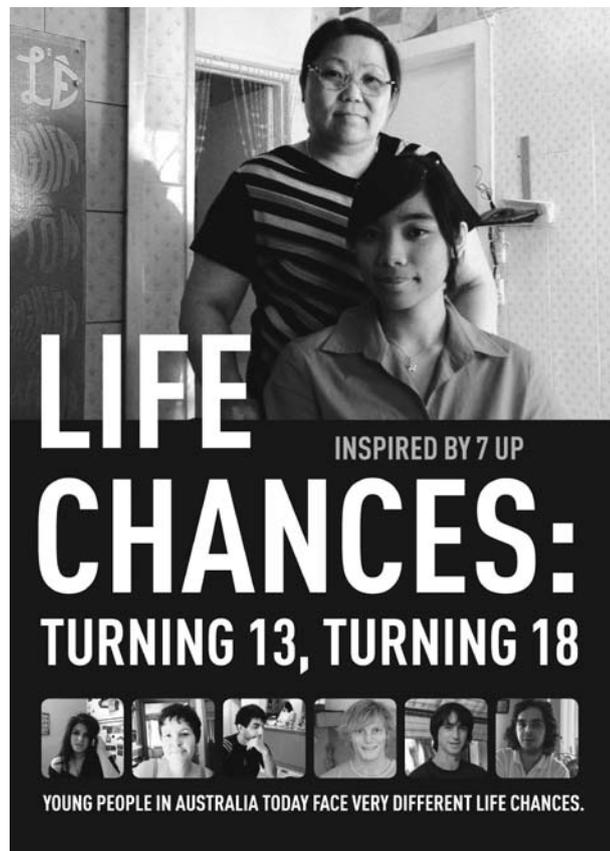
The Life Chances findings have implications for social policy at both federal and state levels. They show the need for ensuring adequate incomes for families with children, particularly appropriate income support and decent wages, as well as for social investment in housing, health and education. For example, welfare-to-work policies need to address not only parents' barriers to employment but also the children's needs for parental time and support. There have been both gains and losses for low-income families from social policy changes over the past twenty years.

The next stage

We are currently planning Stage 10 of the study to explore how the experiences of 21-year-olds can inform current policy discussions. Questions to be examined include: What are the education and employment pathways of the young people? How do these relate to wellbeing? What has been the impact of education costs and income support on the young people's experience and decision making? What has promoted positive pathways for early school leavers? What does the data say about intergenerational disadvantage?

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Overlooked and underemployed The challenge of assisting disadvantaged jobseekers

Not all Australians have benefited equally from the sustained national economic growth of the past decade. The income gains have been concentrated among those with already high incomes; those who have benefited least are the unemployed or those outside the labour market (Azpitarte 2011). While this is partly due to the inadequacy and indexation method of income support payments—especially Newstart Allowance—there are also many Australians who want to work but are unable to find sustainable employment. How best to assist the 620,300 Australians looking for work (August 2011 figures, Australian Bureau of Statistics 2011a)—particularly the 123,600 who face long-term unemployment—is the focus of ongoing research and advocacy at the Brotherhood.

Labour market trends

Despite robust employment growth and decreasing unemployment between 1990 and 2008, long-term unemployment in Australia has grown. During this period, the proportion of unemployed people receiving benefits continuously for over two years rose from 16 to 43 per cent (Davidson 2011). The profile of long-term unemployed participants in employment programs has also become more disadvantaged, with more of these people affected by homelessness, addictions or mental illness and disabilities, and higher numbers of people of mature age and Indigenous background (Davidson 2011).

Australia also has high rates of *underemployment*—people who are working fewer than 35 hours per week but would like to work more. In September 2011, almost 1.5 million Australians were ‘underutilised’ (either unemployed or underemployed) and underemployed workers

outnumbered unemployed people in Australia (ABS 2011b).

The prevalence of underemployment coincides with another significant change—the erosion of the standard employment contract. Jobseekers and the underemployed face an increasingly precarious labour market; and in Australia precarious work is strongly associated with casual employment (Campbell, Whitehouse & Baxter 2009, p. 69). Over one-quarter of all employees are now casual workers, compared with only 15 per cent in 1984 (Burgess, Campbell & May 2008); many are low-paid and clustered in low-skill industries (Campbell, Whitehouse & Baxter 2009). Although women and young workers are more likely to be in casual employment, recent growth has been among prime-aged men. Around 70 per cent of part-time casual workers would prefer more hours (Burgess, Campbell & May 2008).

Long-term unemployment and underemployment are known to have detrimental effects for individuals. Long-term unemployment is associated with declining health and social exclusion (Social Inclusion Board 2010). Underemployment also has adverse effects on income, income support reliance and subjective wellbeing, particularly for workers who find themselves involuntarily employed part-time in casual work (Wilkins 2007).

Further, the challenges of an ageing workforce, and the demand for skilled workers in particular industries, create an imperative to ensure that unemployed and underemployed Australians are provided with the skills necessary to take advantage of future job opportunities (Skills Australia 2011).

Assistance for jobseekers

At present, jobseekers are predominantly serviced by the privatised system of employment services, Job Services Australia. The Brotherhood of St Laurence (2008, 2011) has argued that this system fails to assist the most disadvantaged jobseekers and does little to address substantial levels of underutilisation. Recent reports show that Job Services Australia providers are achieving employment outcomes of around 25 per cent for their most disadvantaged clients. Only one-third (35.7%) of those who gain employment do so with a permanent job; 53.3 per cent have casual, temporary or seasonal work; and the remaining 11 per cent are self-employed (DEEWR 2011).

The Brotherhood provides a range of services (outside the Job Services Australia system) for disadvantaged jobseekers, especially public housing residents, young people, refugees and long-term unemployed individuals. These groups face similar, multiple difficulties in finding employment. Many public housing tenants do not have paid work; and the percentage of households without a working-age adult in employment is increasing, partly due to the narrower targeting of housing to those most in need (Hughes 2006). However, these tenants also face disincentives to employment related to income-based rent and the high effective marginal tax rates due to the combined effect of withdrawn income support payments and increased rent (Wood 2005).

The barriers to employment for disadvantaged young people include lack of entry-level jobs, poverty, homelessness, negative employer attitudes, poor literacy and numeracy, complex health needs and family breakdown (Cull 2011). Young people disengaged from school are likely to earn less and

The profile of long-term unemployed participants in employment programs has also become more disadvantaged.

have less security in employment, with negative consequences for their health and wellbeing (Lamb & Rice 2008). Refugee jobseekers may face specific barriers including lack of recognised skills and qualifications, the effects of trauma and limited social networks (Mestan 2008). Often mainstream employment services struggle to assist refugees and migrants (Mestan 2008; Shutes 2011).

These difficulties faced by particular jobseekers do not exist in isolation. Many jobseekers face intersecting structural and personal difficulties, including factors relating to gender, care obligations, age and disability. What they share is a desire to find work which suits their circumstances and services and training from people who understand their needs and engage with their aspirations.

Research strategy

Working together with the Brotherhood's employment and training services, we have developed a research strategy to investigate what actually works. Davidson (2011) has recently argued that:

researchers need to get inside the black box that sits between program inputs and outcomes in order to understand the dynamic interactions between activity requirements and program participation, and the effects of different sequences of employment assistance ... particularly ... when assessing the assistance for more disadvantaged jobseekers (p. 84).

The Line of Sight research strategy asks four questions: which elements of the Brotherhood's approach to employment and training effectively meet the needs of disadvantaged jobseekers; how does this approach differ from mainstream approaches to employment service delivery; how can this approach be adapted to better suit particular groups;

and what are the opportunities and constraints for doing so? The last question focuses on the impact of intersecting forms of disadvantage and the interaction between the labour market structure, the social security system and individual employment decisions on employment outcomes.

Current projects include an evaluation of a program for young jobseekers in Caroline Springs; an evaluation of social enterprises which take on disadvantaged trainees; a study of the experiences of refugee women in a microenterprise program. Drawing together the experiences of disadvantaged jobseekers, knowledge about the 'black box' of services and understanding of the structures and policies which shape the labour market, we aim to contribute to improved policy, inform strategies for engaging with employers, document our service knowledge and draw attention to the challenges posed by the precarious labour market in creating pathways to steady jobs.

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Many jobseekers face intersecting structural and personal difficulties, including factors relating to gender, care obligations, age and disability.

Understanding and responding to youth disengagement Peninsula Youth Connections evaluation

Concerned about the 16.4 per cent of 15–19 year olds not fully engaged in education or employment (in FYA 2010, Table 3), the federal and state governments introduced the 2009 Compact with Young Australians, which seeks to lift Year 12 or equivalent attainment to 90 per cent by 2015 through a suite of measures and programs, including Youth Connections.

The Brotherhood and Taskforce Community Agency operate Peninsula Youth Connections (PYC) which provides re-engagement activities and intensive case management in the Frankston and Mornington Peninsula region for 13–19 year olds at risk of disengaging from education or training, and seeks to build the capacity of local youth services. Stage 1 of our PYC evaluation included interviews with 24 school and community youth professionals about young people’s unmet needs and barriers to participation in education. Using Peninsula Youth Connections as a case study, the evaluation also reflected on the broader Youth Connections approach.

Multiple, complex and systemic barriers

The evaluation found that multiple and complex factors, including family instability, low income, place-based disadvantage, health and housing needs, made it difficult for some young people to engage in school. As one school professional observed:

If they don’t know where they’re going to live tonight, they’re not going to be engaged in doing history or cooking.

This resonated with Te Riele’s analysis of the ‘parallel complexities’ faced by young people and also the Making a Difference project which illustrated how family breakdown, moving home and school multiple times and material disadvantage can split

student energies, with school ceasing to be a priority (Skattebol 2011).

However the study found that young people’s engagement was also impeded by a number of systemic education barriers:

- the different cultures and learning environments of primary and secondary school
- the perception of schools as authoritarian systems where conformity to rules was a pre-requisite for the opportunity to learn
- lack of system flexibility to provide for students with different needs and caring responsibilities
- insufficient resourcing of wellbeing support for students
- the shortage of effective re-engagement programs
- the negative impact of school ranking systems on willingness to retain or accept the transfer of underperforming students
- non-adherence to exit procedures by some schools, and the lack of alternative programs for students aged under 15
- curriculum-centred approaches and a bias toward academic pathways (e.g. with students not fitting this model feeling they gained nothing from school)
- lack of emphasis on vocational pathways as a legitimate choice.

Removing the barriers

A key strength of Youth Connections as a response to disengagement is its flexible, holistic approach and intensive case management. The research demonstrated the program’s role as an intermediary between multiple service environments (education, employment, health and community services). There is still a need to clarify their respective responsibilities, and

ensure that service boundaries do not prevent young people from receiving the support they need.

The focus of Youth Connections is on addressing young people’s life circumstances that act as barriers to participation (for example, health, housing, self-esteem), supporting young people to fit within educational structures, and negotiating exceptions for individuals with special needs or locating alternative learning options for them. However, systemic barriers also impede engagement. This presents the challenge of how the program, and the government more generally, can address limitations within the education and training system and ultimately commit to a policy of ‘education for all’. While Youth Connections includes regional capacity building activities, and providers can advocate for systemic change, their influence is limited, with state–federal divisions representing a further complicating factor. To truly address disengagement, the government and Youth Connections must influence systemic change, and this will require greater collaboration and integration between services.

The full report (Bond 2011) is on the Brotherhood’s website.

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The study found that young people’s engagement was also impeded by a number of systemic education barriers.

A risky cocktail Alcohol, drugs and other kinds of youth disadvantage

Every week we are confronted with media stories about young people's alcohol and other drug (AOD) use. The most widely used drug is, of course, alcohol. Recent research demonstrates that in Australia:

- per capita consumption of alcohol has increased (Chikritzhs et al. 2011)
- more young people are presenting at hospitals because of acute harms caused by alcohol (Livingston 2008)
- those aged 18–29 years were the most likely to report both using illicit drugs and drinking alcohol at risky levels in the previous 12 months (AIHW 2011).

While increasing attention is directed to AOD-related harms, less emphasis is placed by Australian researchers upon the disproportionate impact of alcohol and other drugs on people experiencing disadvantage.

AOD use and other disadvantage

For young people experiencing disadvantage, AOD use may be only one factor interacting with other forms of social exclusion to negatively affect their health and wellbeing. By unpacking the interrelated factors of AOD use and geographical isolation, trauma, ethnicity or refugee background, homelessness and poor mental health, we are better placed to understand the complex and multidimensional processes that further entrench disadvantage.

The Brotherhood's recent submission to the Victorian Government to inform a whole-of-government AOD strategy (BSL 2011) outlines how AOD consumption may exacerbate social and economic disadvantage. For example, young people in rural, regional and outer-suburban areas which are not well served by transport or alcohol-free community

activities are at particular risk of harmful AOD use. Research suggests that risk factors that may contribute to AOD use are also prominent for young people with a refugee background (Mario-Ring et al. 2005; Reid, Crofts & Beyer 2001). These factors included low neighbourhood attachment and belonging, geographical and cultural isolation, balancing peer and public pressures to assimilate or to conform with parental expectations or national values, and trauma associated with a sense of loss or separation from family members.

The experience of insecure housing and disengagement from school can also pull a young person back into substance use. For example, recent Brotherhood research that included interviews of youth workers and school staff found that for some young people a lack of housing options was accompanied by substance abuse (Bond 2011).

Integrated solutions

The complexity of issues raised by AOD use requires a coordinated approach to policy and services. For example, integrated service hubs that seek to address a range of needs can be effective if they are adequately resourced, effectively coordinated, embedded within the community and, where appropriate, focused on long-term case management.

On the surface, this kind of integrated approach makes sense. However, without a considered policy framework that recognises how multiple dimensions interact to compound disadvantage, there is a risk that issues such as AOD use will continue to be addressed in a narrow and artificially isolated manner. It is essential that greater understanding is sought from the subjective experience of young people as they negotiate the social,

economic and health context that structures their wellbeing.

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Young people in rural, regional and outer-suburban areas which are not well served by transport or alcohol-free community activities are at particular risk of harmful AOD use.

Exploring age and intergenerational identity

There is an increasing and somewhat unfortunate tendency in social policy to view population ageing as a problem which pits younger generations against older ones. The latest *Intergenerational report*, for example, almost exclusively places older adults in the 'problem' box, using the familiar narrative of 'burden' and 'drain' on the rest of society (Treasury 2010). Some social commentators have advocated a renewed aggression in intergenerational discourse, directed primarily against later life. Writers such as David Willetts (2010), now a British Government minister, has criticised the boomer generation for social selfishness—a view which stands in a long line of North American popular literature which uses 'apocalyptic' language to describe the 'threat' of a long life to the rest of us (see Moody (2008) for a review).

This confrontational view is a far cry from the call, at the Second World Assembly on Ageing in Madrid in 2002, 'to strengthen solidarity between generations and intergenerational partnerships, keeping in mind the particular needs of both older and younger ones' (UNO 2002, p.4); and it has prompted the American Association of Retired Persons' submission to the United Nations to emphasise that 'We have been compelled to better promote intergenerational contacts, solidarity, and mutual support systems' (AARP 2009).

However, very little is known about what everyday intergenerational relationships in Australia actually look like. How far are personal relations affected by wider forms of negative debate, for example?

The Brotherhood of St Laurence Retirement and Ageing research team, in conjunction with the National Ageing Research Institute, has devised an innovative research

project which will also produce a lively visual contribution to the discussion, exploring the viewpoints of younger and older citizens and identifying common issues. The data collected will enhance our understanding of intergenerational relations and provide an evidence base for future ways forward. The project, partly sponsored by the Lord Mayor's Charitable Foundation, also involves Youthworx, a Melbourne media training studio that works primarily with young people who have experienced homelessness or educational disadvantage.

Intergenerational interviews

Ten younger adults (aged 18–24) and ten older adults (aged over 70) were interviewed, with five of each being interviewed by an age peer and five by someone from the other age group. The interviews were filmed by Youthworx so that segments could be used to produce a DVD.

Four questions were used to access perceptions of ageing and identity: both younger and older adults were asked about their chronological age, felt age, age as seen by others and desired age.

Questions about age prejudice, based on the work of Bytheway (2005), asked what forms of age prejudice participants have experienced, in what context and who were the other parties involved. Participants were also asked what challenges they see members of the other age group experiencing, whether they see any overlaps or differences between the two age groups and what might be done to improve mutual understanding.

Initial results indicate that perceptions of other generations vary markedly depending upon whether they occur in personal situations, such as grandparenting

or helping situations, or whether they occur in the public sphere, for example through anonymous encounters or the mass media. Personal contact tends to support positive attitudes, whereas more impersonal forms are more negative.

The DVD was screened and research Insights shared at a public forum on 20 October in Melbourne. This project is a pilot which will we hope will be extended in the near future.

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Perceptions of other generations vary markedly depending upon whether they occur in personal situations or in the public sphere.

Planning inclusive, competitive cities

Some people might think that place-based social exclusion has slipped down government policy agendas in Australia. We do not see the same enthusiasm for ‘place management’ and ‘neighborhood renewal’ as at the beginning of this century (Smyth, Reddel & Jones 2006). In fact, the reality is more interesting. Policy communities are quietly engaging with a bigger question: can you plan development so you do not get concentrations of exclusion in the first place?

First-phase place policy focused on factors like limited ‘stocks of social capital’ and ‘community resilience’, with traditional community development responses. The limits of this scale of response then became apparent. In Victoria, for example, the Department for Victorian Communities was merged into the Department of Planning and Community Development: place interventions had to be scaled up to attend to social infrastructure and opportunities for economic participation. The last elections heightened the political imperative of addressing issues of place in outer suburbs and ‘fast-growth corridors’. Hence the place question has become: can you plan to avoid place-based exclusion?

To answer, we need a sense of the history of planning in Australia, to which Robert Freestone’s (2010) *Urban nation, Australia’s planning heritage* offers an excellent guide. The context is the rise of social planning in the 1970s. In response to critiques of the ‘ugliness’ of the postwar suburban sprawl, there was a new recognition of the importance of place, of *where you live*. A fair go was not just a matter of take-home pay, but also of whether your place had access to good-quality child care, schools, hospitals, libraries, aged care and so on. Informed by academics like Hugh Stretton and Patrick Troy,

policies such as the Australian Assistance Plan and agencies like the Department of Urban and Regional Development emerged to develop social planning frameworks to ensure a just allocation of services.

People like Brendan Gleeson (most recently, Gleeson & Steele 2010) show how social planners went the way of all regulators in the neoliberal nineties. Governments got out of the way as markets led development and we went from the ‘just’ to the ‘competitive’ city. Thus began the policy era of global city competition, place marketing, gentrification, master-planned estates and increasing polarisation. For Gleeson this absence of social planning has left Australian cities socially and environmentally ‘toxic’. Whether you agree with him or not, he does highlight the stark difference between policies based on an earlier notion of social justice and the contemporary emphasis on user pays.

Social planning and social policy

As governments look for new development frameworks (see *Our cities our future*, Department of Infrastructure and Transport 2011), social planning research is in full-scale revival. Renewing social justice is the theme of Fainstein’s (2010) *The just city*. Beginning with contemporary concepts of social investment and capability, she asks what are the ‘rights to the city’ that all citizens have. Her answers have a similar three-part framework to that derived by Australians Fincher and Iveson (2008): first, the material infrastructure (e.g. transport, services); second, recognition for diverse population groups; third, democracy and effective participatory governance.

This might sound abstract but to get beyond ‘community renewal’ we must engage with this capacity of social planning to analyse

systematically the enabling resources citizens need if they are to have effective rights to the place. Moreover, in an era of ‘tough love’ welfare politics, it will be vital to be able to audit communities for these effective rights if the continuing emphasis on civic obligation is to have any credibility.

In turn, social planning needs to engage social policy. Disciplinary bases in geography and architecture need to be complemented by an understanding of the complexities of major issues in place, such as long-term unemployment, homelessness and child welfare. Also the new ‘just cities’ frameworks tend to be set against the ‘competitive city’. The Brotherhood’s inclusive growth research agenda argues that tackling ‘bad inequalities’ of infrastructure and human capital are just as important for economic growth as they are for justice and inclusion.

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The place question has become: can you plan to avoid place-based exclusion?

New research publications

The Brotherhood's research reports, including recent titles listed below, can be downloaded from our website at <<http://www.bsl.org.au/Research-reports>>. Printed copies are available where indicated*.

A path to re-engagement: evaluating the first year of a Community VCAL education program for young people*

George Myconos

This evaluation of the inaugural year of the Brotherhood's Community VCAL program, which combines classroom tuition with vocational training and work placements for young people who have experienced barriers to mainstream education, found that, notwithstanding some challenges, the program made a significant difference to the educational opportunities of most of its students.

Sidelined! Workforce participation and non-participation among baby boomers in Australia*

Dina Bowman and Helen Kimberley

Sidelined! provides insight into the contours and experience of mature-age workforce participation in Australia, to complement the quantitative study commissioned by the Brotherhood of St Laurence from NATSEM. This qualitative study highlighted the widespread and damaging nature of involuntary non-participation and under-participation for older people.

Many faces of saving: social dimensions of Saver Plus

Eve Bodsworth

A small qualitative study of Saver Plus, a matched savings program designed by ANZ and the Brotherhood to assist low-income Australians to build assets and improve their financial capability, explored the social and economic context in which the participants attempted to save money and manage their finances. It also shed light on the constraints to saving faced by individuals and families.

Also available is a 20-page combined summary of this study and the RMIT research report *Evaluation of Saver Plus past participants*.

Improving energy efficiency in Moreland: research sample, baseline measures and recruitment for the Warm Home Cool Home program evaluation

Victoria Johnson and Damian Sullivan

This report contains baseline data from a study to identify the social impacts within households of the Warm Home Cool Home program which offers energy audits and retrofits to low-income households in the City of Moreland in Melbourne's northern suburbs.

New research projects

Stepping stones

The Stepping Stones project funded by AXA aims to increase the financial literacy, social inclusion and economic participation of migrant and refugee women, and through training and education develop small businesses. This three-year evaluation will document the issues faced by participants on their journey towards running their own micro-enterprise, including labour market, training and education experiences.

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Making it happen: learning and work for women in public housing

This study supported by the Victorian Women's Trust will inform an innovative, gender-sensitive response to the learning and employment needs of women in public housing. Through research and interviews with tenants and 'front line' staff, the project will identify issues that affect women's access to learning and paid work and develop approaches that will support their economic, social and cultural participation.

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