

Redland City

Health Care and Social Assistance Industry Sector Plan 2018 -2023

July 2018

Contents

1. Introduction	2
2. Objective of the Plan	4
3. Health Care and Social Assistance Economic Profile and Industry Trends	6
3.1 Economic Profile	6
3.2 Industry Trends	8
3.2.1 Key Economic Drivers	9
3.2.2 Changes in health care and allied health delivery models	9
3.2.3 Digital technology	10
3.2.4 Ageing Population	11
3.3 Industry Issues and Gaps	12
3.4 Redland City Opportunities	13
3.4.1 Enhance health care and social assistance infrastructure	13
3.4.2 Enable health care and social assistance industry sector	15
4. Implementation Plan 2018-2023	17
4.1 Plan Summary.....	17
4.2 Implementation Plan for Redlands.....	19
References	24
Appendix 1 – Summary of State and Federal Plans and Strategies	25

1. INTRODUCTION

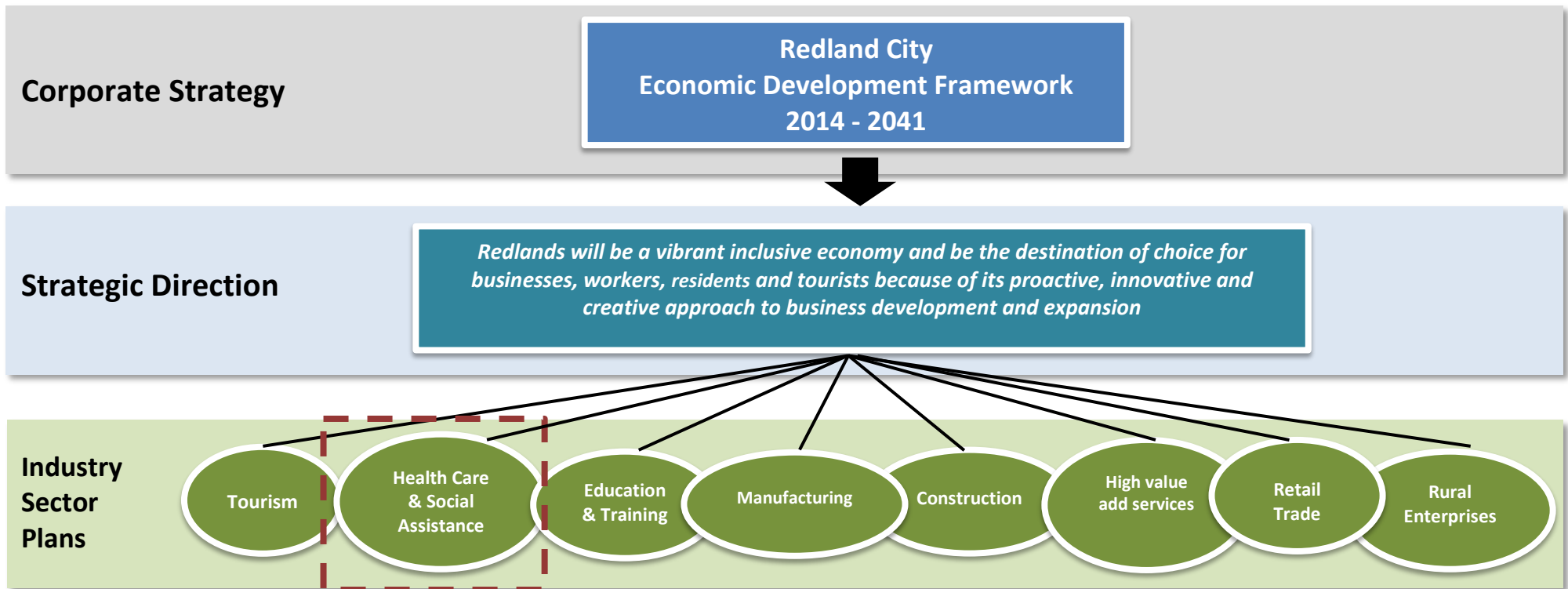
Redland City Council (Council) has developed a **Health Care and Social Assistance Industry Sector Plan** (the Plan) for the period 2018 – 2023 to support the objectives of the **Redland City Economic Development Framework 2014-2041 (EDF)**.

The **EDF** provides a clear direction for business growth and job generation to guide sustainable economic development in the City. Council's focus is the development of key industry sectors – health care and social assistance, education and training, tourism, manufacturing, construction, retail trade, high value-add services and rural enterprises – to deliver sustainable economic growth through strong partnerships with the business community (**see Figure 1 Industry sector plan alignment**). Each sector will require a specific action plan detailing the initiatives and activities that will be undertaken in order to achieve key growth objectives as well as the level of investment required. A Tourism Industry Sector Plan is currently being implemented. Through implementation of the EDF, Council is committed to increasing economic growth and local employment opportunities, as well as ensuring that improved economic capacity is linked to improved lifestyle outcomes for residents and improved community well-being.

The health care and social assistance industry contributes strongly to the Redlands economy and has a large and growing workforce with significant potential for industry investment and expansion. Coupled with the challenges of an ageing population and the opportunities presented by new technology, planning for the future of the industry and the community is a priority for Council.

The Plan recognises the current strength of the industry in the Redlands economy and its potential for growth. It also recognises the role of other levels of government, industry, health and technology experts and Council's responsibility, leading to more investment in the sector and wider economic benefits such as increased local employment. This Plan sets out actions to realise these benefits, and the resources and investment required. The Plan will be used to drive activity, monitor progress and report on outcomes.

Figure 1 Industry sector plan alignment



2. OBJECTIVE OF THE PLAN

The objective of the Plan is to contribute to achieving key growth measures identified in the EDF by addressing the challenges and harnessing the emerging opportunities in the health care and social assistance services sector through a number of actions, as set out in **Figure 2 Implementing the Framework**.

The key growth measures providing the broad economic objectives for the Redlands to 2041 are:

- Population Target - 206,000 by 2041 at an annualised average growth rate of 1.2 per cent
- Number of jobs - 30,000 jobs to be created in the City by 2041
- Gross Regional Product (GRP) Growth - an economy worth \$6.8 billion by 2041
- Tourism Growth - to represent 2% of the Redland City economy

The Plan acknowledges the importance of collaboration with the health care and social assistance sector. Specifically it will:

- Drive initiatives that attract strategic investment opportunities in the sector;
- Enhance business capacity through workshops and training opportunities;
- Continue to develop and maintain strong partnerships with the business community and other levels of government;
- Support training and educational opportunities for the current and future health care and social assistance workforce;
- Enable collaboration within and across industry sectors that will improve efficiencies and supply chain links;
- Enhance international linkages through existing Redland's sister and friendship city relationships;
- Advocate for funding for health care infrastructure and services in the City; and
- Improve residents' access to better local health, aged care and home care services.

Figure 2 Implementing the Framework

This draws on actions identified in the Health Care and Social Assistance Industry Sector Plan 2018-2023

**ECONOMIC
DEVELOPMENT
FRAMEWORK
2014-2041**

**HEALTH CARE AND
SOCIAL ASSISTANCE
INDUSTRY SECTOR PLAN
2018-2023**



3. HEALTH CARE AND SOCIAL ASSISTANCE ECONOMIC PROFILE AND INDUSTRY TRENDS

3.1 Economic Profile

The Health Care and Social Assistance industry sector includes businesses and organisations that are engaged in the provision of human health care and social assistance. The industry has two sub-sectors: Health Care services which include hospitals and other allied health services; and Social Assistance and Residential Care Services which includes aged care residential, child care and other social assistance services (*see Box 1*).

Population

Redland City's estimated resident population (ERP) in 2016 was 151,987 (*see Box 2*). Based on the Census usual resident population (URP), the City had an average annual growth rate of 1.2 per cent over five years and 1.5 per cent over 10 years. Among the suburbs, Mount Cotton experienced the most change between the 2011 and 2016 Census periods with an average annual growth rate of 5.9 per cent followed by Thornlands (2.9 %) and Redland Bay (2.8%).

Age distribution

The median age of persons in Redland City in 2016 was 42 which was higher than Brisbane and the rest of Queensland. About 38% of the City's total population in 2016 were in the 25-54 age cohort, with 18% being 65 years and over.

The largest change between 2011 and 2016 across the age groups, was the 65 years and over with an additional 6,133 persons. This was followed by 55-64 years with an increase of 1,920 persons. The 10-19 and 35-44 years old age cohort experienced a decline (-556 and -717 persons respectively) between the Census periods.

Population projections

The population of Redland City in 2036 is forecast to be 184,683 based on medium series projections prepared by the Office of Economic and Statistical Research (or Queensland Treasury). This indicates an average annual growth rate of 1.1% over a 20 year period from 2016 to 2036.

Box 1 Industry subsectors

Industry Subsectors (3 and 4 digit level ANZSIC classifications)

- Medical and other health services
 - GP Medical services
 - Specialist medical services
 - Dental
 - Optometry
 - Pathology and diagnostic imaging
- Hospitals

- Social Assistance services
 - Adult day care centres
 - Aged care assistance services
 - Disability assistance services
 - Welfare counselling services
 - Youth welfare
 - Child care services

- Residential care services
 - Aged care residential services (e.g. nursing homes)
 - Community mental health hostels
 - Crisis care accommodation

Population projections indicate that the number of people 65 years and over will almost double from 25,309 persons in 2016 to 44,882 in 2036 (see Box 3). This represents a 77% increase. By 2036 at least one in four Redland City residents will be 65 years and over.

Socio-Economic Indexes for Areas (SEIFA) Index of Relative Socio Economic Disadvantage (IRSD)

The Index of relative socio economic disadvantage (IRSD) was developed by the Australian Bureau of Statistics (ABS) to measure an area's level of socio-economic disadvantage based on a range of Census variables. The index was based on characteristics that reflect disadvantage such as low income, low educational attainment and high unemployment. A higher number indicates a lower level of disadvantage.

In 2016, Redland City's IRSD was 1027 which indicates a low level of disadvantage. However the City experienced pockets of disadvantage. The island communities in particular were significantly disadvantaged in comparison to the remainder of the City. Southern Moreton Bay Islands (SMBI) recorded a score of 813. Coochiemudlo (920) and North Stradbroke Island (934) also scored lower in their SEIFA indices.

Economic output and value add

The health care and social assistance industry experienced sustained growth for the past five years and is the largest contributor to employment at the local, state and national level. The strong performance of the sector is fuelled by demographic shifts, particularly the growth in ageing population. The industry was the fourth largest in terms of output (or revenue generated by businesses and organisations) generating \$764.4 million (December 2017) or 6.7% of the City's total output (see Box 3).

The industry was also the third largest in terms of value add contributing \$566.8 million (or 10.4% to total value add).

Workforce

The health care and social assistance sector was the largest employer in Redland City with 6,693 jobs or 15.6% of total employment (ABS 2016). The City had a larger proportion of workers in health care and social assistance in comparison to South East Queensland (13.6%). The number of jobs in the sector grew by 32.2% from 5,061 in 2011 to 6,693 in 2016. The majority of those who worked in the sector were female (83%). A significant proportion of the workforce of the sector were employed as community and

Box 2 Summary of Key Statistics

Redlands Demographic Snapshot



2016 ERP – 151,987
2011 ERP – 143,711
1.2% Average annual growth rate



Median age of 42
(35 in Brisbane and 37 in Qld)



5.5% needing assistance with core activities
(5.0% in SEQ)



5.9% Unemployment rate (December quarter 2017)
(5.9% Unemployment rate in Qld)

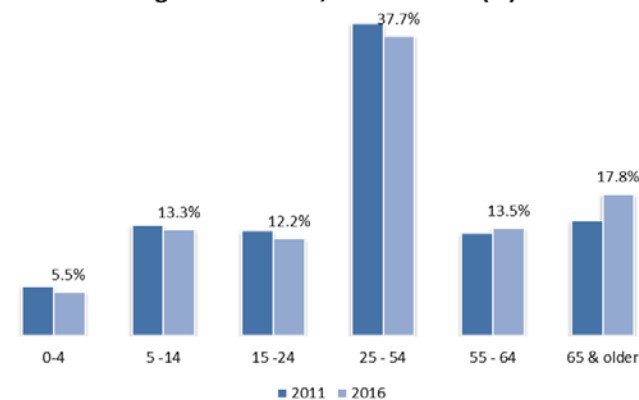


62.6% Total Labour Force Participation (Redlands)

Source: 2016 ABS Census of Population and Housing; Department of Jobs and Small Business

Redlands Age Distribution

Age Distribution, 2011 & 2016 (%)



Source: 2016 ABS Census of Population and Housing

personal service workers (40%) followed by professionals (35%) and clerical and administrative workers (13%).

The industry's workforce also had an older age profile with more than half of the workforce (or 51%) in the 45 and over age group. Health care and social assistance workers were highly educated and highly skilled with 44% having a Bachelor's degree or higher. Almost a quarter (24%) of the workers had Certificate level qualifications.

Wages and salaries

Health care and social assistance had the largest wages and salaries paid to employees who work in the City amounting to \$487.6 million. This accounted for 17% of the total wages and salaries for Redlands.

Businesses

As of February 2018, 1,514 businesses (or 4% of total number of businesses) in the health care and social assistance industry were registered in the Redlands. Of these, 970 were in the Health Care Services subsector and 544 were in the Residential Care and Social Assistance services subsector.

Value of health care and social assistance

As demand for health care increases, due to the forecast population growth and the ageing demographic profile of the City, additional health care services will drive economic growth. This will be brought about by investment in infrastructure (buildings), growth in the associated supply chain as well as direct service provision in hospitals, general practice, allied health, community health and home care services.

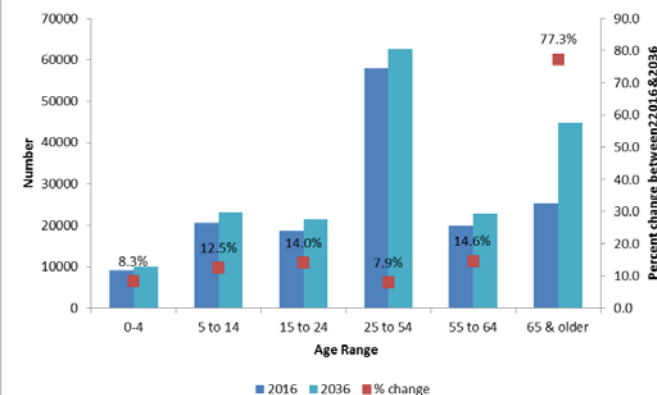
3.2 Industry Trends

The health care and social assistance industry is anticipated to dominate employment growth and will contribute significantly to economic output in the next five years. The sector is driven by an ageing population, public funding structures and population growth. Digital disruption will impact on industries including health care and social assistance and will influence how businesses deliver services with the availability of more advanced technologies. Health care delivery models are likewise changing with more emphasis on a client driven approach and an increasing trend towards home or community care. While these trends can impact on the health care and social assistance industry in the Redlands, the City can also capitalise on the potential opportunities they bring.

Box 3 Summary of Key Statistics

Population Projection

Population projection by age group and percent change, 2016 & 2036



Source: Queensland Treasury. Population projection medium series. 2015 edition

Health Care & Social Assistance Industry Snapshot



\$764.4 M Output or 6.7% of the city's output



Largest employer in Redland City with 6,693 jobs in 2016



Employment in the industry is set to grow at an average annual rate of 2.3%



83% of the industry's workforce in 2016 were female



There were 1,514 registered businesses in the Health Care and Social Assistance Industry Sector in the Redlands as of February 2018

Source: economy.id; REMPLAN economy

3.2.1 Key Economic Drivers

The health care and social assistance industry is largely influenced by demographic factors. The industry's strong performance in terms of employment and output has been attributed mainly to the growth in demand. Older people tend to access health services more, requiring frequent medical check-ups and treatments. Women's increasing labour force participation affects demand for childcare services. Over the next five years, it is anticipated that these factors will create a greater demand for allied health and community services including: aged, childcare and social support services.

The level of State and Federal Government funding for health and community services also affects the industry. Governments provide significant revenue to health services such as hospitals but with increasing pressure to control expenditure in sectors associated with health, governments may implement changes to funding arrangements.

The community services industry subsector that supports people who are experiencing disadvantage is also quite reliant on government funding. These organisations provide social safety nets that address community needs and their activities have significant community benefits. They often operate in counter-cyclical fashion i.e. the demand for welfare services increases when the economy experiences a downturn and when real discretionary income falls. Hence any changes to funding could impact on revenue streams and service provision.

3.2.2 Changes in health care and allied health delivery models

Health services throughout Australia and internationally have implemented various forms of service reconfiguration aimed at achieving better coordination in integrated care. The implementation of these models will allow health care providers to shift the focus of health care away from an episodic care approach toward a person-centred (client-driven), coordinated and tailored integrated health care approach that meets the needs and preferences of the individual, their carers and family.

The roll out of the National Disability Insurance Scheme (NDIS) will alter the way disability support services are provided. The NDIS adopts a market based approach to disability support services that will foster competition and maximise consumer choice. While the impact of the NDIS is still largely unknown, existing providers will need to develop options for transitioning to a competitive market with implementation of the full scheme in the Redlands from July 2018. New suppliers are also expected to emerge from other sectors such as health and aged care and there will be a need to work closely across the different sectors. It is also anticipated that the disability sector's workforce will need to more-than-double in size to satisfy demand under full implementation of NDIS.

Implications for the Redlands

The shift in delivery models can provide the impetus for health, allied health and community services to collaborate and forge partnerships. Community and disability support services need to be market ready in terms of structure, business processes and program delivery. Redlands has a strong network of social, community and aged care services. Council plays a key role in facilitating partnerships in the sector through its ongoing support of the Redlands Interagency Network, Redlands Disability Network and the Aged Care Providers Network. There will be a much stronger focus on home and local community based care in terms of health services. Hospital sites are expected to diversify their functions as they evolve into 'health campuses' delivering a wide range of integrated services including expanded general practice, allied health, support services and social care. The Redlands Health and Wellness Precinct creates an opportunity to integrate service delivery across education, research, health and allied health areas. Delivering on this Precinct is critical for the opportunities in this Plan to be realised and achievement of performance measures (refer Section 4.2). Additionally the ability to deliver on the four growth measures identified in the EDF will be challenging if the Precinct is not fully realised. (Refer Section 3.4 of this Plan for details of this Precinct and the opportunities and the economic benefits for this City that would be realised as a result).

3.2.3 Digital technology

The changing role of the hospital with a stronger focus on the home and local community as the primary health care arena has been enabled by greater access to the internet and improvements to communication technologies.

The increased implementation of tele-health has allowed patients to transform their living rooms into consultation rooms, reducing the need to travel to hospitals, and allowing for the provision of flexible healthcare service in the local area. The benefits are improved patient comfort and health outcomes.

With the trend increasing, information sharing will become even more critical. Digital access to the health system protocols and the patient record across the continuum of care will allow for consistent treatment, reduced error rates, improved patient outcomes and improved staff and patient satisfaction. Improving communication between service providers can help to facilitate coordination of care and allow for shared care plans and decision making strategies. This supports the work of clinicians and builds relationships between disparate service providers working in multi-disciplinary teams.

The rise of smart phones, social media and the use of sensors provide a new suite of tools that empower consumers with more information and control over their health and offer physicians more options for treatment that are flexible and tailored to each patient, including the ability to provide in-home remote monitoring, sensing and assessment outside the confines of a traditional hospital environment. These technologies can serve to increase connectivity between patients and health providers and allow for the flow of health information to be easily accessed by all involved parties.

Key examples of digital technology that is changing the way healthcare is delivered include:

- Smart Phones - App stores already feature thousands of health apps, though their uptake for health and care to date has been variable;
- At-home or portable diagnostics - these include portable x-ray machines, blood-testing kits and other technology that can provide more and more of the diagnostics required to support health care, with profound consequences for the way the health care system is configured;
- Smart or implantable drug delivery mechanisms - sensor technology so small it can be swallowed and combined with drugs in pill form has already been developed. When the pill dissolves in the stomach, the sensor is activated and transmits data to a wearable patch on the outside of the body and on to a smartphone app. This enables patients and their clinicians to see how well they are adhering to their prescription; and
- Digital therapeutics - health or social care interventions delivered either wholly or significantly through a smartphone or a laptop. They effectively embed clinical practice and therapy into a digital form. At a minimum, these interventions combine provision of clinically curated information on a health condition with advice and techniques for dealing with that condition. Many digital therapy platforms also include a way for people to connect with peers and share their experience, or to connect with health professionals remotely.

Implications for the Redlands

Digital technology has significantly transformed our communities and economies. It will become the foundation of integrated health care and is both a key enabler of and a by-product of innovation. Innovations have enhanced the lives of people of all ages and abilities, but none more so than the lives of seniors. New products have provided seniors improved quality of life by allowing them to have fulfilling experiences that otherwise wouldn't have been possible due to limited mobility. With its commitment to innovation, Redlands has an opportunity to facilitate the development and use of cutting edge digital technology to provide better quality of care in the aged care sector. Through the

Advance Queensland's Regional Innovation Program (ARIP) that supports innovation and entrepreneurship, Council can catalyse innovation opportunities in the City by building the innovation ecosystem and creating pathways and a supportive environment where innovators can discuss and collaborate and attract new investment.

The Redlands has an older median age profile than that of Queensland, with this gap set to widen. The trend of an ageing population is an Australia-wide issue not being systematically researched or addressed at a national or state level. There are a large number of research centres for the ageing focused on health, but very few are focused on education and there are none in Queensland.

A Centre of Excellence in Education for the Ageing can be a 'living laboratory' where ideas on how digital technologies can assist individuals and communities with managing their health, social services, disability and aged care challenges are developed, while also facilitating continued education for older adults on innovation and health.

The opportunity aligns closely with the master planning for a Redlands Health and Wellness Precinct and the Queensland Government-funded Maturing the Infrastructure Pipeline Program Early Stage Assessment for a potential Cleveland Innovation Precinct. There is also potential to explore partnership opportunities facilitated through Advance Queensland's Advancing Regional Innovation Program and with tertiary institutions including the University of Queensland and Griffith University's Cooperative Research Centre's 'Smart Ageing' bid and the City4Age program.

In addition, the University of the Third Age (U3A) – a worldwide, volunteer organisation for the continuing education of those in their 'third age' of life – is particularly strong in the Redlands, with approximately 1800 members. The community organisation's valuable expertise could be utilised as a resource in the potential establishment of a Centre of Excellence in Education for the Ageing.

3.2.4 Ageing Population

The Australian ageing population is growing quickly. Within the next 20 years, those over 65 year old will make up over 17 per cent of the total population. Due to improvements in health care, the 85 years and over population is also increasing rapidly and in 20 years' time this group is projected to almost double and make up three per cent of the total population.

More people are living longer and better, well into old age. However, advances in health care can only prolong life for so long. As life expectancy increases, the ways in which people die will change. Heart disease, strokes and cancer continue to be leading causes of death for those aged 65 and over in Australia, however there is also a significant increase in degenerative diseases that impair cognition (dementia and Alzheimer's disease), with these diseases being the second most common cause of death for those aged 85 and over.

Caring for older people is becoming more expensive, with an increasing share of health expenditure directed at those aged 65 and over and with retired persons spending more and more of their household income on healthcare. More funding will also need to be provided for long-term care programs to meet the needs of a larger proportion of the population that will age past 85 and develop Alzheimer's, dementia and other high-care diseases.

Implications for the Redlands

The ageing population increases demands and brings opportunities in two distinct areas:

- Increased education and training to boost both the skills of the local workforce and the number of people available for employment in the aged care sector; and
- Continuing education for the ageing via 'lifelong learning' programs which research has shown offer increased economic, social and health benefits.

An ageing population brings more pressure on allied health and community services and an increasing demand for a trained aged care workforce. With its top performing secondary education sector, its robust network of service providers and its linkages with vocational education providers, Redland City is in a strong position to facilitate training and education opportunities for the aged care workforce.

Council is leading work in the area of innovation and entrepreneurship for the aged as well as collaborating with local service providers around programs that support people with dementia.

3.3 Industry Issues and Gaps

To facilitate the success of the Plan, there are some identified issues and gaps.

Health, aged and social assistance services and infrastructure	Industry workforce
<ul style="list-style-type: none"> ▪ Local hospitals only have capability to care for low to moderate risk patients. Patients with more complex needs are transferred to larger hospitals ▪ Limited capacity to meet increasing demand for health services due to the size of hospital facilities ▪ Limited capacity to provide emergency, medical, survival, neonatal, mental health and sub and non-acute services ▪ Limited opportunities to incorporate teaching and research ▪ Limited public transport options to the hospital precinct ▪ Single road access to the hospital sites and significant undersupply of car parking ▪ Limited availability of general practice clinics that are open late evening and on weekends ▪ Consolidation of services due to impact of customer driven care ▪ Service gaps in high health needs areas particularly in the City's island communities ▪ Limited supported accommodation, transitional care and respite care 	<ul style="list-style-type: none"> ▪ Shortage of general practitioners ▪ Shortage of private medical specialists including anaesthetists, cardiologist, general surgeons, ophthalmologists and medical oncologists ▪ Casualisation of workforce ▪ Workforce deficits in allied health services (physiotherapists, podiatrists, occupational therapists) ▪ Increased demand for training and education of workforce to meet future needs

It is important to note that addressing these issues and gaps will require working in partnership with the Redlands Health Care and Social Assistance industry sector, business, community and the State and Federal Governments.

3.4 Redland City Opportunities

The following provides an overview of the Health Care and Social Assistance opportunities identified for the Redlands.

Infrastructure and partnership opportunities	Workforce and business development opportunities
<ul style="list-style-type: none"> ▪ Collaboration between public hospitals and educational institutes ▪ Partnerships between public hospitals and private health service providers to address service gaps and efficiencies ▪ Co-location opportunities with private clinics particularly in the Redlands Health and Wellness Precinct ▪ Explore the development of a Centre of Excellence in Education for the Ageing ▪ Capitalise on the growth of the use of digital technology for health and aged care ▪ Develop an investment attraction strategy for the industry 	<ul style="list-style-type: none"> ▪ Partnership with TAFE and training providers to facilitate aged care and disability sector education to upskill workforce ▪ Organise summits that can be a platform for health care and social assistance industries to engage and network ▪ Support existing networks of aged care and community service organisations to improve access to information and coordination of services ▪ Business support through workshops and training opportunities ▪ Work with international partners to identify and develop opportunities and attract investment

3.4.1 Enhance health care and social assistance infrastructure

Health and Wellness Precinct

Council is working in partnership with Mater Misericordiae Ltd (Mater) and Metro South Hospital and Health Service (MSH) which oversees Redland Hospital to deliver a Health and Wellness Precinct master plan. The precinct, which is centred on Weippin Street in Cleveland will incorporate the planned expansion of the private and public hospitals and identify potential industry clustering opportunities around the hospitals.

As well as identifying and zoning the precinct as a Specialist centre in the Redland City Plan, the area is identified in the *Shaping SEQ South East Queensland Regional Plan 2017* as a knowledge and technology precinct, which contains a core of high level health, education, research or similar facilities and will provide opportunities for complementary and ancillary services to develop in the area over time. The precinct presents a catalyst economic opportunity for the City that can generate employment and growth, as well providing high quality specialist and tertiary health services for Redlands' residents in the long term.

Potential development and operation of an integrated health and education precinct would bring investment and economic activity and deliver significant health benefits for the Redlands. Due to the dynamic nature of the opportunities, estimates of the benefits can be indicative only and a detailed economic analysis has not yet been undertaken. The Health Care and Social Assistance consultants' report to Council, has estimated that economic activity could be in the vicinity of \$350 million. Indicative figures for employment opportunities are estimated at 1,900 during potential construction and up to 3,600 overall.

The following is being investigated to be included as part of the precinct's future development:

- Hospital expansions;
- Expanded medical and specialists' services;

- Technology companies supporting the delivery of new-era health services;
- Supporting infrastructure including traffic access and circulation, car parking, public transportation, information and communication technology (ICT) and open space;
- Education and training facilities; and
- Ancillary services focusing on wellness.

Technology – Innovation opportunities

As outlined in this Plan, information and communication technology (ICT) is changing the way health care is delivered. This in turn creates opportunities for technology companies, including those that are already flourishing in the Redlands and companies that potentially will establish here in the future.

Queensland's *e-health Investment Strategy* recognises that ICT is an enabler of integrated, quality and safe health services. Looking at Queensland in particular, the strategy lists some of the global innovation opportunities for potential future investment, as follows:

- Electronic medical records – patients and clinicians can access appropriate medical information at the point-of-care, throughout the life of the patient and across the continuum of care;
- Portals – these provide the basis of integrated information exchange across the healthcare system and a mechanism to access services, patient information and preventative health information;
- Information interoperability – the secure exchange of information between care settings and providers, improves the health system's ability to work with health service partners and improves the integration of health services across settings;
- Mobile health – remote and mobile monitoring of patients' vital signs can increase patient safety, reduce the risk of adverse medical events and potentially reduce unnecessary hospitalisation;
- Mobile telecommunications technologies – deliver health services in, or as close to home as possible, reducing travel costs for patients and providers, as well as offer access to more equitable distribution of health services; and
- Integrated scheduling and eReferrals – streamline the patient pathway with options for patient input and transfer of patients.

Locally, the *Metro South Service Plan – Draft for Consultation*, has also identified the importance of digital technology as a key enabler to support a range of strategies including the recently implemented Electronic Medical Record system, increased Telehealth capacity, supporting innovation, access to data and exchange of information between Government departments, business and the community.

As part of the move to ICT in health care, Council acknowledges that improving internet access and performance in the Redlands is a critical challenge and is continuing to work with Federal and State Governments, and providers, to rectify this situation.

Centre of Excellence in Education for the Ageing

A Centre of Excellence in Education for the Ageing has the potential to be the confluence of education, training and research in the region, specifically in areas of strength such as aged care. It is important to build on local competitive strengths and harnessing existing community organisations as a potential resource can create significant opportunities not only in terms of educating older people but also facilitating inter-generational mentoring programs. Potential benefits of establishing a Centre of Excellence at a pilot location in Redland City could include:

- Attraction of a higher educated and higher paid workforce;

- The training of older people leading to their greater health and in some cases higher labour force participation, employment and wages;
- An increased number of employees, which will impact economic output;
- A greater sense of community with opportunity for involvement of education providers such as U3A;
- A living lab for ageing research;
- An innovation space that explores new technology that can positively impact on the quality of life of seniors;
- Reduced demand on health sector resources;
- Contribution to the financial return to the Redlands Health and Wellness Precinct or potential Cleveland Innovation Hub or wherever it is placed; and
- Putting Redland City 'on the map' in terms of having a significant and leading edge research centre addressing major ageing and social policy issues.

Investment attraction

Council is working to build an investment attraction strategy for Redland City, which will encourage and enhance current action plans. Council has commissioned a Gap Analysis and Opportunities Assessment study to identify opportunities for key and emerging industry sectors. These have the potential to support business growth and re-capture some of the workforce that is currently leaving Redland City. The findings will inform future investment attraction strategies in key industries, including health care and social assistance.

Planning and Regulatory Framework - Redland City Plan

At the time of this Plan's publication in July 2018, the master plan process for the Health and Wellness Precinct was approaching completion. Council continues to work in close partnership with MSH and Mater to plan for a Health and Wellness Precinct, which will be a major economic driver for Redland City.

The purpose of the master planning process is to identify the optimal development of the site as the City's major health hub, generating high employment opportunities and economic output. The planning framework has been based on the outcomes of industry demand, urban planning, ecological and traffic studies that were conducted as part of the process, and aims to:

- Position the area as the City's pre-eminent health and wellness precinct, where specialist and general health services, health-based education and training and related activities will cluster;
- Deliver a vibrant and sustainable precinct, which is a focus for private and government investment and complements the City's existing network;
- Encourage economic investment and employment generation by co-locating a mix of land uses and activities; and
- Determine the potential type, scale and location of health-related uses and services that can leverage off the hospital expansions and positively contribute to the long term health, community, employment and education needs of the City.

3.4.2 Enable health care and social assistance industry sector

Building business capacity

Council's aim is to improve the competitiveness and capacity of health care and social assistance businesses and organisations. Integral to achieving this aim, is building on the established, networking and communication channels between the industry and Council, to further strengthen working relationships.

To identify specific ways in which Council can assist, it is proposed that Council will:

- Deliver Health Care and Social Assistance industry summits in partnership with the local industry;
- Link and liaise with the health care and social assistance industry to identify business training needs;
- Facilitate and coordinate workshops that improve the competitiveness and capacity of health care and social assistance businesses and organisations;
- Provide timely information on business grants and training opportunities; and
- Assist new businesses by providing advice and facilitating access to pertinent information and grants.

The purpose of the industry summits will be to:

- Discuss trends, transformative ideas, issues and solutions to industry challenges; and
- Identify health care and social assistance industry experts and leaders who can provide input and engage with the local sector and businesses, leading to research and investment opportunities.

International links

Council continues to build on international relationships which have been established in China, Japan and South Korea, through 'sister city' and 'friendship city' agreements. This has resulted in increased overseas interest, for example, in 2017 a delegation to Kani City, located in Gifu Prefecture, in central Japan led to representatives from the Gifu Medical Science University touring the Redlands and inspecting medical and aged care facilities in early 2018. The university will send a study tour to Redland City in 2019.

Partnering with international institutes in order to tap into the Redlands' expertise in the field of health and aged care, offers a range of benefits such as: workforce attraction and retention, potential reciprocal arrangements, professional development opportunities and the economic and social advantages that accrue from a first-class, international reputation. An environmental scan of international education providers will pave the way for linking with stakeholders and identifying the best approach to capitalise on the growing international education market.

Workforce attraction and development

Council recognises that growing the Redlands' health care and social assistance workforce to meet current and future needs is vital to maintaining and growing the City's liveability. Council will support this by:

- Undertaking a key industry sector validation assessment to understand the workforce profile;
- Liaising with industry to identify workforces needs;
- Facilitating links between industry employers and VET and higher education providers; and
- Working with university, TAFE and the vocational training sector to facilitate the development of training and education programs for the aged care and disability sector workforce.

4. IMPLEMENTATION PLAN 2018-2023

This Implementation Plan contains actions required to realise future opportunities in the Health Care and Social Assistance Industry Sector, contributing to the achievement of the objectives in EDF.

4.1 Plan Summary

Actions will be implemented over the following time frames:

- Short-term – within the next two years (2018–2020)
- Medium-term – within the next three years (2020–2023)
- Long-term – to be undertaken after five or more years (2023 onwards) but may need to commence in the medium-term
- Ongoing – actions will continually be dealt with through the life of the plan.

The resultant work program is captured in **Figure 3 Implementation Plan Summary**. The work program for year 1 including resourcing and budget is already provided for within the financial year 2018/2019 budget. Activity from years 2 to 5 may be subject to future yearly budget bids for resourcing and funding to deliver actions.

Council could play five active roles in engaging the sector and implementing the actions (*see Table 1*):

Table 1 Council roles

Advocate	Attract and retain public, private and non-government investment that expands the economic base and improves service delivery in the City.
Regulate	Implement land use and infrastructure planning and policy development that will support the industry sector.
Partner	Strengthen existing links and networks and to establish constructive working relationships with businesses and government to implement initiatives and to enhance supply chain links.
Facilitate	Enable the growth of emerging businesses by ensuring the provision of timely information, access to business grants, sponsorship and training opportunities.
Lead/Deliver	Take the lead and implement initiatives that will foster an environment that is conducive to business growth and expansion.

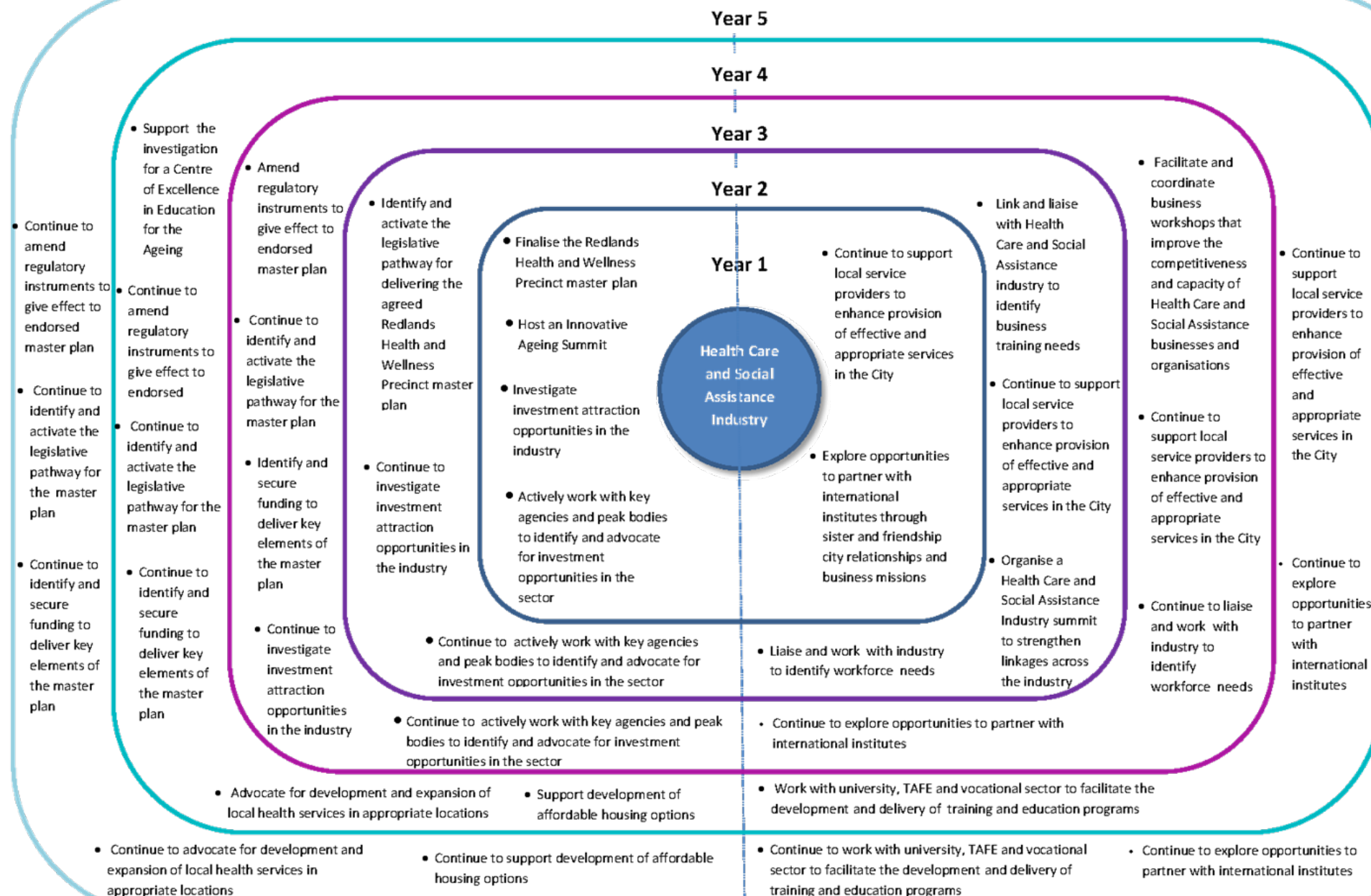
Figure 3 Implementation Plan Summary



Enhance infrastructure



Enable industry sector



4.2 Implementation Plan for Redlands

1. Enhance health care and social assistance infrastructure

Outcome: Development of infrastructure that supports business and employment growth in the Health Care and Social Assistance industry

Objective	Actions	Governance		Performance Measure	Resources	Timeframe
		Council's Role	Key Stakeholders			
Deliver the Redlands Health and Wellness Precinct Master Plan	<ul style="list-style-type: none"> Finalise the Redlands Health and Wellness Precinct master plan and present to Council for future direction 	<ul style="list-style-type: none"> Facilitate 	<ul style="list-style-type: none"> Metro South Hospital and Health Service (MSH) Mater Misericordiae Ltd (Mater) State Government 	Council decision on Master plan including future direction	Yr 1 activity funded through 2018/2019 budget	Short (Year 1)
	<ul style="list-style-type: none"> Identify and activate the legislative pathway for delivering the agreed Redlands Health and Wellness Precinct master plan 	<ul style="list-style-type: none"> Advocate/Facilitate 	<ul style="list-style-type: none"> MSH Mater State Government 	Delivery pathway for Redlands Health and Wellness Precinct master plan confirmed	Funding to implement master plan subject to future budget bid	Medium to long
	<ul style="list-style-type: none"> Amend regulatory instruments to give effect to endorsed master plan 	<ul style="list-style-type: none"> Lead/Facilitate 	<ul style="list-style-type: none"> MSH Mater State Government 	Relevant regulatory instruments amended	Funding to implement master plan subject to future budget bid	Medium to long
	<ul style="list-style-type: none"> Identify and secure funding to deliver key elements of the master plan 	<ul style="list-style-type: none"> Advocate/Facilitate 	<ul style="list-style-type: none"> State and Federal Governments Industry stakeholders 	Funding stream identified and funds committed to implementing elements of the master plan	Funding to implement master plan subject to future budget bid and external funding streams	Medium to long
Increase innovation opportunities in health and aged care	<ul style="list-style-type: none"> Host an Innovative Ageing Summit to facilitate links with industry and identify opportunities for innovation 	<ul style="list-style-type: none"> Facilitate 	<ul style="list-style-type: none"> Aged Care Providers Network Hospitals Industry leaders State and Federal 	Innovative Ageing Summit delivered and subsequent innovation	Budget captured under the Advance Queensland's Regional	Short (Year 1)

Objective	Actions	Governance		Performance Measure	Resources	Timeframe
		Council's Role	Key Stakeholders			
			<ul style="list-style-type: none"> Governments Chambers of commerce Education providers Researchers Start-ups 	opportunities and partnerships identified	Innovation Program (ARIP) funding	
	<ul style="list-style-type: none"> Support the investigation for a Centre of Excellence in Education for the Ageing (refer to the Education and Training Industry Sector Plan 2018-2023) 	<ul style="list-style-type: none"> Partner 	<ul style="list-style-type: none"> Education providers Health and aged care industry sectors Tertiary institutions Community organisations 	Detailed report outlining model, timeframes and partners for a Centre of Excellence in Education for the Ageing completed	Budget to be identified in the Education and Training Industry Sector Plan 2018-2023	Medium to Long
Attract investment in Health Care and Social Assistance industry	<ul style="list-style-type: none"> Investigate investment attraction and expansion opportunities in the Health Care and Social Assistance industry 	<ul style="list-style-type: none"> Deliver 	<ul style="list-style-type: none"> Industry stakeholders State and Federal Governments 	Health care and social assistance industry investment attraction plan developed and implemented*	Activity funded in 2018/2019; *elements of implementation may be subject to future budget bids	Short (Year 1) to Medium
	<ul style="list-style-type: none"> Actively work with key agencies and peak bodies to identify and advocate for investment opportunities in the sector both locally and internationally 	<ul style="list-style-type: none"> Advocate/ Partner 	<ul style="list-style-type: none"> South East Queensland Council of Mayors Logan and Redlands Regional Development Australia Committee State and Federal Governments Brisbane South Primary Health Network International partner cities 	Investment opportunities identified	Activity funded in 2018/2019	Short to Medium

Objective	Actions	Governance		Performance Measure	Resources	Timeframe
		Council's Role	Key Stakeholders			
	<ul style="list-style-type: none"> Advocate for development and expansion of local health services (including general practitioners and specialist services) in appropriate locations to address current per capita under-supply 	<ul style="list-style-type: none"> Advocate / Facilitate 	<ul style="list-style-type: none"> State and Federal Governments Brisbane South Primary Health Network 	Number of new and expanded local health services; improved per capita supply of general practitioners and specialist services in the City	Activity funded through investment attraction strategy and master plan implementation	Medium to Long
Monitor the implementation of the City Plan to ensure the Strategic outcomes of Liveable Communities and Housing and Economic Development are met	<ul style="list-style-type: none"> Support development of affordable housing options to attract sector workforce 	<ul style="list-style-type: none"> Regulate/ Advocate/ Facilitate 	<ul style="list-style-type: none"> State and Federal Governments Housing providers 	Housing options identified for sector workforce in accessible locations	Activity funded in annual budgets	Medium to Long

2 Enable health care and social assistance industry sector

Outcome: Improve productivity of health care and social assistance industry sector businesses and workforce

Objective	Actions	Governance		Performance Measure	Resources	Timeframe
		Council's Role	Key stakeholders			
Improve competitiveness and build capacity of Health Care and Social Assistance businesses and organisations	<ul style="list-style-type: none"> Link and liaise with Health Care and Social Assistance industry to identify business training needs 	Deliver	<ul style="list-style-type: none"> Community Services Aged Care Residential Services Allied Health services Chambers of commerce 	A detailed report identifying training needs that will inform planning for future business workshops	Budget bid request in FY 2019/2020 (indicative cost \$30,000)	Short
	<ul style="list-style-type: none"> Facilitate and coordinate business workshops that improve the competitiveness and capacity of Health Care and Social Assistance businesses and organisations 	Facilitate	<ul style="list-style-type: none"> Community Services Aged Care Residential Services Allied Health services Chambers of commerce Industry stakeholders 	Number of participants satisfied with workshops	Subject to budget bid in FY 2020/2021 (indicative cost \$15,000)	Medium
	<ul style="list-style-type: none"> Continue to support local service providers through existing networks to enhance provision of effective and appropriate services in the City 	Facilitate	<ul style="list-style-type: none"> Health care and social assistance organisations Redlands Interagency Network Redlands Disability Network Primary Health Network 	Local service providers survey confirmed effectiveness of Council support	Year 1 activity funded in 2018/2019 budget as BAU	Current and ongoing
Deliver Health Care and Social Assistance sector summit to strengthen linkages across the industry including government agencies, businesses and organisations	<ul style="list-style-type: none"> Organise a Health Care and Social Assistance Industry summit to discuss future trends, transformative ideas, issues and solutions to industry challenges 	Deliver	<ul style="list-style-type: none"> Hospitals Community Services Aged Care Residential Services Allied Health services Chambers of commerce Redlands Economic Development Advisory Board State and Federal Governments 	Health Care and Social Assistance Industry Summit delivered	Subject to budget bid in FY 2019/2020 (indicative cost \$30,000)	Short to medium

Objective	Actions	Governance		Performance Measure	Resources	Timeframe
		Council's Role	Key stakeholders			
Grow Health Care and Social Assistance workforce to meet current and future needs	<ul style="list-style-type: none"> Liaise and work with industry to identify workforce training and education needs 	Facilitate	<ul style="list-style-type: none"> Tertiary institutions TAFE and VET providers Aged care providers network 	A detailed report identifying workforce needs, training opportunities, and education offerings	Budget bid request in FY 2019/2020 (indicative cost \$30,000)	Short to medium
	<ul style="list-style-type: none"> Work with university, TAFE and vocational sector to facilitate the development and delivery of training and education programs for the aged care, social services and disability sector workforce to address identified needs 	Facilitate	<ul style="list-style-type: none"> Tertiary institutions TAFE and VET providers Aged care providers network 	Industry survey to determine if education offerings are meeting industry workforce needs	Subject to budget bid in FY 2022/2023 (indicative cost \$15,000)	Long
Partner with international institutes that tap into Redland expertise in the field of health and aged care	<ul style="list-style-type: none"> Explore opportunities to partner with international institutes by leveraging health and aged care expertise through sister and friendship city relationships and business missions 	Facilitate	<ul style="list-style-type: none"> International partner cities Chambers of commerce Hospitals and other allied health services Aged Care sector Industry stakeholders 	Partnership opportunities identified and developed	Activity funded through 2018/2019 budget Activity will be funded through future annual budget bids	Short to long

REFERENCES

Australian Bureau of Statistics (2016). Census of Population and Housing, 2016. Cat. No. 2001.0

Carramar (2017). Health Care and Social Assistance Strategy and Action Plan Report. Commissioned by Redland City Council.

IBISWorld (2018). Aged Care Residential Services in Australia Industry Report. September 2017.

IBISWorld (2018). Community Services in Australia Industry Report. March 2017.

IBISWorld (2018). Health Care Services in Australia. December 2016.

Redland City Council. Corporate Plan 2018 – 2023. Accessed at https://www.redland.qld.gov.au/info/20226/council_plans/423/corporate_plan

Redland City Economic Development Framework 2014 -2041. Accessed at https://www.redland.qld.gov.au/info/20180/economic_development_-_framework_and_opportunities/252/economic_development_framework

APPENDIX 1 – SUMMARY OF STATE AND FEDERAL PLANS AND STRATEGIES

South East Queensland

Shaping SEQ: Making the most of our future: a vision to guide growth in South East Queensland. It brings together all levels of government to plan for a population increase in SEQ expected to be almost two million people over the next 25 years. *Shaping SEQ* is the foundation upon which the future will be built and guides the State Infrastructure Plan and council planning schemes. The plan was based on recommendations from the South East Queensland Regional Planning Committee which was made up of State Government departments and SEQ Local Government Mayors, including the Mayor of Redland City, Councillor Karen Williams. (Note: In August 2017, *Shaping SEQ* replaced the *South East Regional Plan 2009-2031*.) [Shaping SEQ: Making the most of our future](#)

Brisbane South Primary Health Network – Strategic Plan 2017 onwards: this Primary Health Network (PHN) takes in the Redland City Council area, parts of Brisbane City, all of Logan City and parts of the Scenic Rim. The Federal Government established PHNs in 2015 to: increase the efficiency of medical services for patients, particularly those at risk of poor health outcomes; improve coordination of care to ensure patients receive the right care, in the right place, at the right time. [Brisbane South PHN - Strategic Plan 2017 onwards](#)

Brisbane South Primary Health Network – 2018 Needs Assessment: focuses on a “people” and “places” approach in assisting people in the region. It has a particular focus on those in the most vulnerable groups in geographic locations or “hotspots” which have higher needs, emerging concerns or challenges due to local circumstances. [Brisbane South PHN - 2018 Needs-Assessment](#)

Queensland

The Queensland Plan: a plan created by Queenslanders for Queensland that provides a 30-year roadmap for the state’s growth and prosperity. Health is one of the nine foundations on which the plan is based. [The Queensland Plan](#)

My health, Queensland’s future: Advancing health 2026: Healthcare is being transformed by innovation. By 2026, healthcare will look very different than it does today. This Queensland Health plan will further drive investment in new ideas, research and technology. *Advancing health 2026* was developed to guide Queensland government investment in health over the longer term and to reorient the system to be flexible and innovative in taking advantage of new technologies, while improving health outcomes for the population at large. [My health, Queensland's future: Advancing health 2026](#)

Metro South Health Strategic Plan 2015-2019 (2017 update): the plan provides the leadership to keep up with the rapid rate of change and the growing demands for innovation, in order to deliver best-practice patient care. Metro South Health takes in the Redlands and is an organisation employing more than 14,000 staff, with an annual budget of \$2.3 billion. [Metro South Strategic Plan \(2017 update\)](#)

Metro South Health Service Plan 2017-2022 provides a strategic perspective on health service delivery across all Metro South services. The plan identifies four key service directions, and 39 priority strategies, to guide service development and address the health priorities of the Metro South community to 2022. [Metro South Health Service Plan 2017-2022](#)

eHealth Investment Strategy: information and communications technology (ICT) is an increasing enabler of integrated, quality health services. This strategy ensures that ICT investment form part of a cohesive plan between Hospital and Health Services (HHSs) and the department. It identifies ICT requirements over the next 20 years to ensure the state's health system can continue to provide essential services to Queenslanders. [eHealth Investment Strategy](#)

Every Queensland Succeeding - Disability Service Plan 2017-2020: pledges the Department of Education's support for Queenslanders with a disability. The plan states that the department is committed to collaborating with students, staff, community and partners, to identify how best to support all Queenslanders – regardless of their background, postcode, personal circumstances or ability - to succeed. [Every Queensland Succeeding - Disability Service Plan](#)

Federal Government

National Disability Insurance Scheme (NDIS): will provide about 460,000 Australians under the age of 65, who have with a permanent and significant disability, with the reasonable and necessary supports they need to live an ordinary life. As an insurance scheme, the NDIS takes a lifetime approach, investing in people with disability early to improve their outcomes later in life. The National Disability Insurance Agency (NDIA) is the independent Commonwealth government agency responsible for implementing the NDIS. The scheme became available in Redland City from 1 July 2018. [About the NDIS](#)

Commonwealth Home Support Programme (CHSP): funded by the Australian Government, the programme provides a range of entry-level aged care services for older people who need assistance to keep living independently at home and in their community. The aim is to help older people live as independently as possible and safely at home. [Your Guide to Commonwealth Home Support Program Services](#)

Australia's Health Landscape Infographic: depicts the four tiers of health care in Australia in the form of an infographic. It includes the factors that contribute to health; opportunities such as technology and challenges such as chronic disease; supporting regulations and infrastructure; and health system funding (\$2.3 trillion to 2027.) [Australia's Health Landscape Infographic](#)

National Health and Medical Industry Growth Plan: this \$1.3 billion plan focuses on the medical technology, biotechnology and pharmaceutical sector. It contains a profile of the current sector, the growth plan and future outlook (including forecast changes to both economic and health wealth.) [National Health and Medical Industry Growth Plan](#)

Aged Care Legislated Review 2017: considered the impact and effectiveness of a number of aged care reforms that have been implemented since 2012 and makes recommendations for future reform to the aged care system. [Legislated Review of Aged Care 2017](#)

Review of National Aged Care Quality Regulatory Processes: the review identified that despite reforms to improve the quality of residential aged care, current regulatory mechanisms do not consistently provide the assurance of safety and quality care, that the community expects. The review was presented to the Federal Government in October 2017. [Review of National Aged Care Quality](#)