

EURORAI Seminar in BYDGOSZCZ on the Audit of Social Welfare

The French case: auditing social welfare in support of elderly dependents

This presentation reports on the survey and audits conducted by the Court of Audit and 13 French regional audit chambers into the policy of national and local public aids for elderly dependents. The audit work was undertaken jointly and in the spirit of cooperation and resulted notably in the publication of a national report in November 2005. Following a further survey and audits involving the Court and seven regional audit chambers, the annual public report of the Court of February 2009 addresses how some of the recommendations made in the 2005 report have been followed up.

The gradual ageing of the French population and the resulting increase in physical and mental dependence constitute a serious phenomenon that has been confirmed by all demographic projections. French society, like most Western societies, is going to be severely affected by this situation in the long term; sooner or later, it will affect all families in one way or another. It is a medical, social and financial challenge that has largely been underestimated and that only a carefully prepared and constructed policy can help to meet.

Since the second half of the 1990s, national and local authorities have begun to take up these challenges and have brought in three important reforms. The first aims to respond to the growing needs of elderly dependents and their families by initiating a universal system of benefits, the personal care allowance (*allocation personnalisée d'autonomie*, APA). The second is designed to develop medical intervention in nursing homes and to modernise them. The third, more recent, is aimed at increasing the sources of funding allocated to the care of dependents and the disabled by inaugurating a day of awareness and creating the Independent-Living Support Fund (*Caisse nationale de solidarité pour l'autonomie* - CNSA), the scope of which covers the whole area of a loss of independence.

Two of the Court's chambers and thirteen regional audit chambers (CRCs) undertook coordinated work on this issue during 2004. The public authorities and the relevant officials were briefed on the summary of this work during the first half of 2005.

At the national level, the Court's work focused on guiding the implementation of the policy by the authorities concerned. It also examined the application of the rating reform and mechanisms for allocating health insurance funds to nursing homes for the elderly. In terms of home-care facilities, it sought to measure the overall results obtained since the APA was brought in; it also focused its investigations on the social action of pension funds.

At the local level, two series of investigations were conducted.

The CRCs conducted audits in 27 metropolitan departments in order to assess, across a wide sample, the conditions under which the departmental authorities (which have become major players in the area of support to elderly dependents) were preparing to

respond to their new tasks. Numerous regional chambers audited public bodies catering for the elderly or managing the social and medico-social services involved in nursing homes, in care or in home-care support.

The research into and analysis of the interesting and innovative experiences and practices being implemented in some French departments on the one hand and the examination of systems established in neighbouring countries on the other enabled a comparative dimension to be included in the survey.

The first section of the report offers an assessment of responses already being made in terms of the provision of home-care services and the capacity to take elderly people into institutional care. Significant differences were observed between the authorities' stated objectives and the actual results achieved, and even more so between these and the real needs. This section also includes an evaluation of the decisions taken since the mid-1990s to humanise, modernise and medicalise care systems and increase their effectiveness. On the basis of this assessment and evaluation, the report indicates the efforts that will be needed to intensify and improve the provision of services to elderly dependents.

The second part of the report highlights the complexity of current funding systems, which make it difficult to accurately measure the efforts made nationally in terms of responding to a loss of independence on the part of the elderly. It gives a summary of all these efforts, something never before attempted, and highlights the difficulties in funding the policies being implemented and the objectives recently announced. It also focuses on the problems involved in distributing costs between the different funding sources. Growth in costs over the coming years will only serve to magnify this issue. Recommending that current funding be clarified and consolidated, the report emphasises that specific choices will need to be made between the different options being envisaged.

Finally, the third section considers problems of organisation, coordination and monitoring, at a time when the complex situation of many institutional and professional players is changing to keep pace with an increased focus on decentralisation and the creation of the CNSA. It emphasises that coordination and simplicity are needed in order to take better account of the needs of elderly dependents, particularly in terms of the continuity of their care.

In conclusion, collaboration between France's network of audit offices with judicial status enabled:

- audits into the expenditure of local authorities to be conducted by the regional audit chambers, and audits into central state departments and national agencies involved in this area to be performed by the Court of Audit;
- national public reports to be produced, evaluating the public policy in all its dimensions.