

Project Title:

“TIME TO CARE. Supporting formal and informal caregiving as a related network”

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Executive Summary

This research project focuses on caregiving in favour of frail elderly people living at home. Caregiving plays and will increasingly play a crucial role in keeping older people in their homes and helping ageing in place. Encouraging the elderly to live at home is a major policy goal for all European Countries. Ageing in place is beneficial to both the elderly and society: the former maintain their independence and can continue living near their relatives benefiting from their company; in the meantime, society does not have to sustain the burden of increasing health care costs due to the admissions' raise in nursing homes.

This project investigates the impact that different care arrangements, skills, contexts resources have on the quality of life of carers and the quality of assistance provided. We explore different roles of caring: “formal” and “informal” and their overlooked interplay. In fact, today caregiving is mainly provided by two actors:

- Informal carers, mostly relatives, along with friends and neighbours;
- Formal carers, that is paid workers, employed by the families themselves, often given by migrant women.

Existing information is somehow separated regarding these two actors. We consider linking them as a key element for future social policies. Other forms of home caregiving, namely public home care services, will be taken into account but are not the focus of this project. Our focus is on Italy, and the Lombardy region in particular.

The peculiarity of this project is double: (a) to study home caregiving as a network made of different actors, formal and informal; and (b) to explore the role of care workers, which is a typical Italian phenomenon but quite under-researched one.

Both actors, family carers and care workers (we call them “badanti”, that is a person looking after someone else), go through important changes: the number of elderly increases at a faster pace of care workers, which are rarely trained, and experience many limitations. Furthermore, family carers have increasing work-life balance difficulties, and their number is destined to decrease. This opens many questions regarding how an ageing in place will be supported, in a country in which home care services reach less than 4% of total older population.

It is urgent to build a new strategy, capable to sustain these two actors, to raise the quality of care, to help the so called “sandwich generation” in coping with its difficulties, to reach the lonely seniors and those without family ties, which will increase in time, also engaging local community resources.

This project is planned to last two years and is proposed by a partnership which includes:

- **ARS** - Associazione per la Ricerca Sociale (Association for Social Research);
- **ACLI Lombardia** (Italian Christian Workers' Associations - Lombardy Section);
- **University of Pavia**.

The project's main activities are structured in 4 Work Packages, as shown in the following table. These include: two “twin surveys” on family carers and on care workers, a qualitative study on projects active at a local community level, and a comparison between Lombardy, Italy and Europe.

Dissemination of project activities, as detailed in the Dissemination Plan, includes a new project web site, two main conferences, a book to be published at the end of the project, publications of articles in scientific journals.

Work Package	CONTENTS	Partner Responsible
WP1	Survey on a sample of 500 family carers of elderly with limited autonomy, representative of the informal caregiving phenomenon in Lombardy.	ARS
WP2	Case study of 6 projects, public and private, sustaining home caregiving, connecting families with care workers, raising the quality of care and supporting lonely seniors.	ACLI Lombardy
WP3	Survey on a sample of 250 care workers, representative of the different existing profiles.	ARS
WP4	Caregiving: a comparison between Lombardy, Italy and Europe, using the SHARE data base	University of Pavia

The key themes (keywords) of the project are: carers, caregiving, ageing in place, community action.

Scientific background

Who are the carers? Carers are those persons who take care, assist, help a person. In this project we target home carers, that is those who assist an elderly person in his home. There are two types of carers: informal and formal¹. Informal carers are typically people who care for an elderly friend or loved one at no cost to the person receiving the care. Informal care can take many forms and can be given by all sorts of people in the life of the one receiving the care. In this project we focus on *family* carers, which are by far the most relevant. Then we have formal carers, that is paid professionals either working in public or private organisations or employed directly by families. We will focus on this latter case, concentrating on what we call in Italy “badanti”: care workers, for the large majority (90%) migrant care workers, working at home either in a live-in solution or in a day care one.

Care workers play a crucial role towards an aging population, especially in those cases, as Italy, where home care services, both social and health ones, are very limited in the coverage they provide, less than 4% of target population, the over 65. By recruiting a “badante” families overcome the limitations of the public home care system.

Literature on carers and caregiving has become vast in the last twenty years. Formal and informal caregivers meet different needs of the elderly and in general tend to be complementary (Litwak 1985; Bass et al. 1996; van Houtven and Norton 2009) even although some authors (Lyons and Zarit 1999; Bonsang 2009) find that informal caregiving is a substitute for formal care. Mainly close relatives (e.g. children to parents and vice versa: Kemper 1992) provide informal caregiving. Adults often provide their elderly parents with a series of services (shopping, dressing, toileting, meal preparation, etc.) that the elderly are no longer able to provide for themselves.

There is both a psychological and economic side to informal caregiving. Donelan et al. (2002) point out that “research on informal caregiving has highlighted the intense emotional and physical burden on some caregivers” (p. 222) and others point to the fact that the caregiving experience is a complex phenomenon. It impacts on all aspects of the caregiver’s life, including his or her physical, emotional and psychological health (Deeken et al. 2003). Carers bear not only the physical burden of the care provided, but are also affectively linked to the recipient. This fact may bring psychological distress, although some studies find positive effects of caregiving on the individual wellbeing in terms of, for example, a sense of satisfaction (Ingersoll-Dayton et al. 2001; Lee et al.

¹ There is a long literature on what should we mean by formal and informal carers: see for example Schneider et al. (2015).

2001). Informal caregiving also represents economic costs to society in the form of negative externalities which may be translated into monetary terms.

The literature has generally found a gender bias in informal caregiving: women (and daughters in particular) are likely to care for elderly relatives (parents) more than men (Dentinger and Clarkberg 2002). A stream of literature also focuses on the so called “sandwich generation”: people who care for their older parents and for children who still live at home. For the baby boomers this is a recurring condition.

In most countries, the provision of care to parents and children is culturally considered a responsibility more of women than of men (Abel 1986; Pocock 2005). Empirical studies show that the traditional division of roles is often confirmed. A factor which is likely to mediate the impact of caregiving is the social and cultural environment. In general, studies that focus on Europe show that intergenerational ties are typically closer in the Mediterranean than in the Nordic countries (Hank 2007; Bolin et al. 2008), as well as in the more southern compared to the more northern parts of a Mediterranean country such as Italy (Pagani and Marenzi 2008).

Informal care faces a series of challenges in Italy, one being represented by the decreasing old-age support ratio, which is today second only to Japan (United Nations 2012). This is also due to formal care staff shortages which is occurring in the last few years (Colombo and Muir, 2015). Another challenge comes from the increasing participation in the labour market of Italian women, especially in mature age, who traditionally provide the bulk of informal care: their participation rate has more than doubled in the last decade (with a further jump in the last few years, despite the economic crisis), although it still remains far lower than that of most European countries (Saraceno, 2010).

These changes do not seem however to have affected the “familistic” attitude towards elder care that characterises most Italians. Already before the crisis, a very large majority of Italians thought that it would be a good thing if adults in working age would look after their frail older parents, or pay for the care of their own parents, if these are not able to do it themselves (European Commission 2007). These attitudes are very likely to be still there, however, as Italy reports in Europe the highest share of population providing informal care to a dependent relative or friend (Censis 2014).

Care workers

In Italy, like in other EU Southern countries, care workers have been directly employed by households as individuals providing care at home. This care market is shaped by widespread informal or undeclared agreements between individual care providers and care recipients. And is mostly composed by migrant population. In other countries, like France and the UK, the involvement of migrant care workers has taken place mainly in the formal sector (i.e. health and social care services, and in particular residential care homes or home care providers), both as a response to chronic difficulties in the recruitment and retain of native born workers in the care sector, and as a cost-saving strategy pursued through contracting out and externalization of publicly-funded care services to private, for profit providers (Colombo and Muir, 2015).

Employment of foreign-born persons by industry (health and activities for households as employers) among some EU countries: % of total foreign-born employment, 2015

	Health (%)	Activities for households as employers (%)
Italy	4,8	19,9
Spain	5,1	13,3
France	14,5	2,8
Germany	11,3	1,1
Austria	9,6	0,5
United Kingdom	14,7	0,3
Sweden	19,7	0,0

Source: OECD (<http://dx.doi.org/10.1787/888933396335>).

In Italy are the families which directly employ care workers (90% of which are migrant) as a more easy, fast and cheap way to get the assistance needed. But care workers encounter a number of critical issues in their job, mainly due to a deregulated market, a quite under researched topic.

Italy is a paradigmatic example of a “residual model” in welfare states regimes, where limited in-kind services (even reduced by austerity policies during the last years) are strongly supplemented by the key role played by family carers (mainly women) and intergenerational solidarity in supporting dependent older people.

The main national care allowance, the so called “*Indennità di accompagnamento*”, was introduced in 1980 and has expanded incrementally providing a partial compensation to the care costs sustained by Italian families. Given the absence of specific requirements and controls on the use of these resources, in recent years this allowance has strongly contributed to the growing involvement of care workers directly employed by Italian families, mainly through irregular working relations (van Hooren 2014). The recent estimates are impressive: there are around 860,000 care workers directly employed by the families, the majority of whom - about 60% - being without a regular contract (Pasquinelli, 2015 and www.qualificare.info). As the following table shows, their declared number has remained basically steady since 2012, after a period of relevant growth.

Number of registered care workers, per year

	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>	<i>2015</i>	<i>2016</i>
Italy	291.069	307.936	363.257	367.843	369.350	379.326	379.046
Lombardy	47.171	47.622	55.606	55.248	55.198	56.615	57.367

Source: our elaborations on INPS data.

This market-based solution of a big care deficit problem continues to be appreciated by Italian families for its economic convenience as well as for the intensive hourly coverage guaranteed by these workers. Research has also shown that the migrant-live-in solution has been generally accepted as coherent with a dominant cultural orientation in favour of “ageing in place” solutions, adverse to the move of frail older people in nursing homes (Da Roit and Weicht, 2013; Barbabella et. al 2015).

In the case of Italy, therefore, a context of institutional inertia, limited provision of in-kind services, and dominance of a structural nation-wide long term care cash-based unconditional measure (Pavolini et al. 2017), have jointly contributed to make care workers a sort of low-waged functional equivalent to care provided through professional services or informal caregiving, in particular for older people with high dependency (Pasquinelli, 2015; Ranci and Pavolini, 2013, 2015; Shutes and Chiatti 2012).

This market is more an extension and a re-definition of the traditional family-based care system predominant in the country than an outcome of intentional public policy. No legal or quality requirements have been introduced in this market as consequence of the dominance of informal agreements and lack of restrictive regulation in the care system and in the labour market. Their special quality of functional workers was progressively accepted even though their harsh working and living conditions were not recognized in the public debate. Especially in a live-in framework. They became “invisible workers”, with a very weak social and civil status, with no access to rights that are normally recognized to Italian workers (one day of holiday in a week, 1-2 weeks holiday in a year, unemployment protection, limitation in the working hours, etc.). Their social “deserving” role is accepted and legitimized under the condition that their work is defined within a private agreement with their employers.

In sum, both family carers and care workers experience weaknesses, difficulties and critical issues which tend to shape their fragility, often framed in a context of isolation and lack of supports. They usually meet in a lonely environment, with no supports, advice, ongoing help from any welfare agency in the matching process. Furthermore, as we shall see, the rising loneliness of the elderly is opening a new generation of seniors in need of supports but with no or very weak family ties. These can afford a care worker, but with limited capabilities in serving as employers.

Policies to support informal care are best guided by considering the carer as a co-producer in providing adequate support. “A key policy concern is whether the supply of informal care will keep pace with the growing care demand for long term care. In terms of policy priorities, the ‘carer as a co-producer logic’ calls for measures that support informal caregivers in delivering adequate care and that contribute to the stability of informal caregiving networks” (Schneider et al., 2015, p. 234).

This project originates from all these premises.

Preliminary data and project rationale

In Lombardy there is an estimate of 334,000 seniors with functional limitations assisted at home, as shown in the table below. We can estimate the number of dependent elderly in 2030 applying to Lombardy the ISTAT estimates. The result indicates the presence of 432.000 elderly with problems of dependency in 2030, an increase of about 98.000 in just fifteen years.

People aged 65 and over with functional limitations. Estimates for 2030

	2014	2030	Var. 2014-2030
<i>Italy</i>	2.036.000	2.634.000	+598.000
<i>Lombardy</i>	334.000	432.000	+98.000

Source: elaborations on ISTAT, Indagine Multiscopo “Condizioni di salute e ricorso ai servizi sanitari”, 2015; ISTAT, Population at 1.1.2015 and ISTAT, Previsions of population at 2030.

At the same time, for the years to come demographic estimates draw a reduction of potential caregivers, with a gap between the number of people potentially in need of care and the carers. Today of 100 potential caregivers weigh about 20 octogenarians, in 2030 the latter will rise to 24.5 and in 2040 will arrive at 30 (Brenna, Di Novi, 2016). The downsizing of informal care resources in the families is greatly connected with:

- reduced birth rates;
- increase in divorces and separations;
- increase of female employment rates, especially in Lombardy (58.6% versus 48.3% at national level, according to ISTAT, “*Statistics of labor and employment*, 2016”);
- retirement age extension, which reduces carers’ time availability for caregiving.

For all these reasons, public policies are called upon to take action not only in favour of the dependent elderly, but also to address previous steps: supporting a healthy ageing in place, at home, preventing the loss of self-reliance and individual autonomy.

Furthermore, ageing is related to a growing problem of loneliness. In the Lombardy Region about an elderly out of three (32.2%) lives alone. This is an element of fragility. The diminishing of family relationships, often accompanied by a gradual disappearance of friendship and neighbourliness, may hinder an active lifestyle in terms of social relations that may gradually lead to psycho-physical consequences. The outlook is an increase of lonely-seniors, with limited care resources: less caregiver to rely on. That is what the European Commission calls the “dwindling supply of potential carers” (European Commission, 2014).

People aged 65 and over, by type of living arrangement (in %)

	Lombardy	Italy
Living alone	32,2	29,6
Living in couple with others	41,8	40,8
Living in couple with one or more sons	10,6	12,7
Single with one or more sons	11,8	13,6
Other	3,7	3,4
Total	100,0	100,0

Source: our elaborations on EU SILC 2012 Survey data, 2015.

In such a context, international literature (for example Ranci and Pavolini, 2013) agrees in pointing out that the major goal of welfare policies in favour of the ageing in place must be to support people at critical steps of their lives, e.g. widowhood, retirement, self-decline. Policies that "keep families together" are needed, addressing social, cultural, technological, leisure issues. We need to know which care arrangements become possible and how they impact on the quality of life of both formal and informal carers.

In particular, in recent years innovative projects have been implemented in the framework of a "sharing welfare" and collaborative model, based on such experiences as the cooperation of neighbours, peer-to-peer help, and co-employment. Many of these schemes are still under evaluation, but they seem interesting in terms of innovation, community engagement, and cost effectiveness (Pasquinelli, 2017).

Home care services, provided by public authorities, reach in Italy just about 3% of older people (NNA, 2017). In particular, in Lombardy welfare services for the elderly are traditionally dominated by nursing homes (RSA) whose costs for households are less and less sustainable. Healthy ageing is thus delegated to the ability of families in self-organizing, within the so called "do-it-yourself-welfare" (Pasquinelli, 2015).

Theoretical framework

With these premises, our project is based on the following steps and hypotheses.

Starting point: Family carers and care workers are the main pillars sustaining the independence decline of many seniors. These actors face different and multiple weaknesses, but both of them will be increasingly needed. Some of such critical issues are specific (e.g. working conditions), some others are common (e.g. skills detained, work-life balance). We need to build new knowledge on these issues and the related criticalities, in order to overcome them and build a stronger network to support caregiving. We need to investigate how different care arrangements, skills, personal and context resources impact on the quality of life and the quality of assistance provided. Our knowledge must be improved.

Hypotheses: Both family carers and care workers can better cope with the frail elderly if:

1. they have satisfactory life quality (living conditions, work-life balance, social relations, low stress degree);
2. they have the right skills and competences (with particular attention to dementia conditions);
3. they access local community resources;
4. they access social, health, and mobility services;
5. they are familiar with digital technologies and ICT;
6. they are positive toward shared care arrangements (with neighbours, peer group support, etc.);
7. they access supports in case of a breakdown of health conditions.

Consequence: We want to test such seven assumptions to discover different caring styles, strengths and weaknesses in the caregiving system, and possible policy support priorities. To reach this goal we need to increase our understanding both on the formal and informal side. Linking these two sides can provide new evidence on their complementarity and the roles of care work in the fading of family ties.

Based on this theoretical framework, this project has three main goals:

1. **To investigate how family carers and care workers cope with an ageing population**, with what resources, supports, and consequences on their quality of life and on the assistance provided.

2. **To understand how different types of carers relate to, and complement, each other,** in a time of increasing work-life balance difficulties, and when the number of family carers is facing a decrease. In the years to come there will be a growing number of lonely and dependent seniors. Care workers may so shift from a complement role to a substitute one with respect to family ties: this project will help understand how this shift can be supported.
3. **To identify a strategy to support family carers and care workers as a related network.** Both actors are facing rapid challenges, in a country where seniors' number increase more than 250,000 a year and where social welfare services reach no more than 4% of elderly population in their homes. We need a sound strategy to avoid a social collapse, a framework to support the main two actors of caregiving in order to strengthen their functions.

Preliminary data of this proposal, in terms of already existing information on which we will work, are:

- Official statistics, Italian and European: ISTAT (*Indagine Multiscopo*), Ministry of Health, Database Archimedes, INPS, Eurostat, SHARE Database, HSN Observatory;
- National Reports such as "*Network Non Autosufficienza*" (the last Report has been published in 2017: NNA, 2017) and the "*Rapporto sulla vita nelle età avanzate*" (Fifth edition);
- Previous work done by the research team members: the "*Primo Rapporto sul lavoro di cura in Lombardia*" directed by the Principal Investigator, who has also founded the web site www.qualificare.info, which the national web site on projects and policies regarding private care work in Italy; the international SHARE database analyses carried out in previous years by University of Pavia partner team.

Relevance to the call

This project is relevant to the call because carers are the main resource for an ageing and increasingly dependent population, in Italy as well as in Europe. Caregiving, especially if provided at home, needs time, different actors, new skills and supports, new arrangements that need to be explored.

The findings expected will make a novel contribution to existing knowledge because the points of view we adopt are not routinely considered in generic assessment of caring activity. In fact this project:

- Focuses on the two main actors providing caregiving: formal and informal;
- Focuses on each of these two specific conditions along with mutual criticalities and needs;
- Analyses the interest and disposal toward new forms of care arrangements, in the context of a growing collaborative and sharing welfare system;
- Plans to set a new strategy to support caregiving in the years to come.

The research team covers multidisciplinary skills: sociological, economic, statistical, gerontologist ones. In addition, we believe that project's relevance is expressed by three factors.

1. **Completeness.** The project is not sector specific, but looks at ageing connecting different points of view, from the caregiving point of view. What the project will achieve fills important gaps of knowledge in terms of:
 - a. an analysis of different groups of caregivers, and related conditions, through two "twin surveys" on family carers and care workers: this has never been made before (WP 1 and 3);
 - b. an analysis of places and projects that support caregiving in the communities (WP2);
 - c. a comparison between Italy and Europe (WP4).
2. **The involvement of the third sector.** The partnership includes a large third sector organisation (ACLI Lombardia), which has a wide grass root structure, which will play important roles in WP1,

WP2 and WP3 through its knowledge and direct experience in the field, helping to improve the operational capabilities of the project to reach its goals and disseminate its findings.

3. **Stakeholder Involvement.** The project approach is that of "Responsible Research and Innovation" (RRI), actively involving relevant stakeholders.

We have endorsement letters (attached) sustaining this project from:

- The European Federation for Family Employment and Home Care;
- ACLI COLF - that is one of the main Italian network advocating care workers and their living conditions;
- INCA CGIL - that is the main "Patronato", along with ACLI, dealing with elderly people, and assisting them under many points of view, namely in the application for national care allowances;
- Confcooperative, which is the major umbrella organisation with hundreds of members, in particular social cooperatives, deeply involved in services for the ageing and ageing in place.

This will result in an active role in the definition of specific issues to be addressed. Through periodical meetings (indicatively every 4 months) we will build such stakeholder dialogue with representatives from such relevant parties in order to develop an integrated agenda. Given the asymmetries between stakeholders, the dialogue will be carefully prepared to give each one a 'say'. Aspects that will help create an impartial and meaningful process will be: ensuring equal numbers of representatives; selecting participants with open minds; using nontechnical language; reserving time for conversation; assisting stakeholders before the meetings; and obtaining consensus on appropriate times and locations for the dialogue meetings.

We also want to explain why we focus on Lombardy (with Lombardy/Italy/Europe comparisons). We focus on Lombardy for two main reasons:

1. Firstly, the effort we plan, with two "twin surveys", carried out with adequate methodology and in-depth analysis, is possible in a specific area like a Region, rather than Nationally, though it could be repeated in other areas, in the future.
2. Secondly, in this region the ageing process seems to accelerate, and at the same time is the region with one of the highest employment rates (66.2% versus a 57.4% in Italy) and the highest female employment rates (58.6% versus 48.3%, according to ISTAT, "*Statistics of labor and employment, 2016*"). This generates major problems of reconciliation for caregivers, mostly women, which are in between work commitments and their own family commitments, the so-called "sandwich generation".

Experimental plan

This project will develop in 4 Work Packages (WP). The following table summarizes them.

Work Package	CONTENTS	Partner Responsible
WP1	Survey on a sample of 500 family carers of elderly with limited autonomy, representative of the whole phenomenon of informal caregiving in Lombardy.	ARS
WP2	Explorative, case study of 6 projects, public or private, sustaining home caregiving, connecting families with care workers, raising the quality of care, and supporting lonely seniors.	ACLI Lombardy
WP3	Survey on a sample of 250 care workers, representing different existing profiles.	ARS
WP4	Caregiving: a comparison between Lombardy, Italy and Europe, using the SHARE data base.	University of Pavia

Work package 1

The first Work package will consist in the first of the “twin surveys” that we plan to carry out. This first WP will be based on a sample of family carers in Lombardy.

We will carry out interviews on a sample of 500 families in Lombardy that have a frail elderly member living in it. Different topics will be addressed. The best way to present them is through the following table, which links this with the survey on care workers (WP3):

Main topics addressed in the “Twin Surveys”

Family carer (WP 1)	Topic	Care worker (WP 3)
Age, gender, degree of kinship, family structure (presence of sons, age), position in labour market. Employment and affordability of a care worker.	1. Who is the carer	Age, gender, if migrant country of origin, way in which the match with the family has occurred
Age, health conditions, including dementia, assistance required.	2. The elderly assisted	Age, health conditions, including dementia, assistance required.
Types of help provided, frequency, help from siblings. Presence of a complementing care worker employed.	3. Activities carried out	Care arrangement (live-in/daily work), number of worked hours, declared and un declared, tasks carried out, break periods, frequency.
Self-perceived living conditions, work-life balance, social relations, caring stress.	4. Quality of life²	Working conditions (e.g. live-in or daily assistance). Self-perceived living conditions, work-life balance, social relations, caring stress.
Perceived adequacy of own care skills, including digital ones. Availability to let the care worker train.	5. Skills and training	Perceived adequacy of own care skills, including digital ones. Availability in being trained.
Contacts and fruition of helps from local community, including mobility, leisure activities, support networks.	6. Access to resources of the local community	Presence and availability of extra domestic assistance, access to local community activities, including mobility and local supporting networks.
Which social and health services are used, for which ones there is interest in use.	7. Access to public services	Which social and health services are used, for which ones there is interest in use.
Use/interest in home automation, new technology, remote help devices and ICT.	8. Use of new technologies and ICT	Use/interest in home automation, new technology, remote help devices and ICT.
Interest toward shared care arrangements (e. g. with neighbourhoods).	9. Availability toward shared care arrangements	Willingness to work even for others (e.g. neighbours) in a shared, and co-employment set.

We will use a semi-structured questionnaire, asking the family carer information on the left column.

What is the advantage to carry out two “twin surveys”? Basically, it is to discover coherences and incoherencies between the actors. Two examples. If we discover that many care workers are not enough trained to deal with dementia conditions, but their employers are not available in letting

² We plan to use selected items from the “Manual for the Adult Carer Quality of Life Questionnaire” (AC-QoL). See: Elwick et al. (2010).

them go to training classes, this is an obstacle that needs solution. Again, if home automation and use of ICT are needed, but care worker is not available in using them, this represent another criticality. And we could go on and on. The final goal is to promote a better quality of assistance for the elderly, satisfactory for both the family and the care worker. And to build a system capable in dealing with the needs and criticalities reported.

The sample will be selected from the lists of users of two different “Patronati”. “Patronati” are the agencies in Italy where a person with disabilities and impairments can apply for care allowances. We will use the lists of two major agencies in terms of number of clients served: ACLI Lombardia (partner of this project) and INCA Cgil (see letter of endorsement). Having two of them will reduce the bias risk of having only one type of clients (though being users of these Patronati does not imply any membership and is quite a random choice from the citizen’s point of view).

ACLI Lombardy Patronato lists contain more than 60,000 people who have applied for national disability allowances, and in particular the so called “*Indennità di accompagnamento*”, the main one in favour of dependent seniors. It is the second largest database available, as Patronato of INCA Cgil has a list of over 80,000 users. The use of data extraction of two different (and the most widespread) Patronati will ensure a satisfactory degree of representation, overcoming any possible bias risk.

The survey analyses the caregiver which provides support to a family elderly with limited autonomy, living together or nearby. We consider enough representative a sample of 500 people, being 334,000 the total dependent older people and considering the sampling technique. The extraction of the sample will be made on the basis of a sampling design built with the technique of stratified sample in two levels, coupled with a random extraction. In this way it is possible to ensure the statistical representativeness of the universe of reference safeguarding any non-homogeneity in the various areas of Lombardy. The sample will be built in two levels, respecting:

- a. the distribution of the number of elderly in each province of Lombardy;
- b. the age distribution of frail elderlies, as detected by ISTAT (National institute of statistics) in the Lombardy Region, according to three groups: 65-74; 75-84; 85 and plus years old.

The sample thus built is able to ensure a probability of 92% that the sampling error will be less than 4%. This in practical terms provides an adequate data accuracy for the purpose of this Social Survey, with a representativeness for different areas of Lombardy, urban and extra urban.

Telephone interviews will be conducted with CATI methodology (Computer Aided Telephone Interviewing). They will be based on a semi-structured questionnaire conducted by the company Sylla of Bologna, a company associated ESOMAR, the world organization of research institutions. ARS will be the body “Responsible for processing the collected personal data”, according to Law 675/1996. Once carried out, interviews telephone numbers will be deleted immediately. The answers to the various interviews will be uploaded to a special DB, Excel, SPSS processed and treated only as an aggregate. There will be no way to trace the answers for each record to the contacted person.

Particular attention will be paid to the protection of privacy and anonymity. Over 1,000 records will be drawn from the two Patronati data base, to cope with possible denials and to achieve 500 completed interviews. These records will be made anonymous through an appropriate identification code. Prior to the interviews, the survey will be presented to all potential interviewees through a letter of Patronati, who will present the purpose of the investigation. This letter will ask an explicit informed consent to release the requested information.

This WP1 will be carried out by ARS in collaboration with ACLI Lombardia. The result of this work package will be given by a deliverable, a document of about 40 pages containing the survey findings and the consequences in terms of policy recommendations.

Work package 2

Between the first and the second of the twin surveys, with WP 2 we move to a qualitative analysis, that will be conducted by ACLI Lombardia in collaboration with ARS. This is an explorative study intended to complement the two surveys, in order to understand “good practices” sustaining caregiving, their strengths and weaknesses, and conditions of possible growth. This case study will

enrich our findings and contribute to reach our third project goal, that is to identify a new strategy to support carers and care workers as a related network.

We will focus on a set of 6 local “good practices”, public or private (third sector) projects that:

- a. Support caregiving in favour of the frail seniors, engaging community members;
- b. Support isolated seniors with no or weak family ties (e.g. running little errands, mobility services, employment of a care worker);
- c. Support shared settings of help (e.g. peer-group supports and co-employment arrangements).

We will select 2 cases for each of these three types of activity, operating in Lombardy. A preliminary gathering of available information and “mapping” of active projects will be carried out, at a grass roots level, using different channels and contacts which include partners’ and supporting actors (see endorsement letters) information, in addition to information gathered from our website www.lombardiasociale.it.

The main selection criteria will be represented by the ability of organised activities to reach the goals they pursue in terms of good quality of supports. These cases may be located in volunteer groups, neighbourhood support services, collaborative and peer to peer help activities, community and temporary shelter facilities. We will use specific case-study tools (Byrne, Ragin, 2009). Namely we will use three instruments: (a) face to face interviews; (b) focus groups; (c) participatory observation of activities carried out. We plan to differently use these tools with:

- Project executives;
- Organisation staff;
- Project users.

Each case’s goals, its history and activities, what has been achieved, what difficulties and critical factors have been encountered will be explored in depth. We will examine the strengths and weaknesses that characterize these experiences, related opportunities and threats (SWOT analysis).

We will evidence which “lessons” can be drawn in terms of four dimensions of analysis:

- Degree of innovation in organizational, professional and governance terms;
- Impact generated in terms of ageing in place;
- Sustainability, including the economic one, over time;
- Degree of development and replicability in different communities.

This WP2 will be carried out by ACLI Lombardia in collaboration with ARS. We will use different sources of information (including those available from the project’s stakeholders, as said earlier) to map, contact and select experiences considered of interest. The result of this WP will be given by a deliverable, a document of about 30 pages containing a description of the selected cases, evidence collected in both detailed and comprehensive ways, and identified consequences in terms of policy recommendations.

Work package 3

The second of the twin surveys will be focused on care workers. There is a prudential estimate of about 860.000 care workers in Italy and of about 160.000 in Lombardy, the majority of whom without a declared, regular contract. Their presence, activities, characteristics are much under-researched topics.

The sample. We will build a sample of 250 care workers in Lombardy. As explained further on, in this case we need to carry out face-to-face interviews, and this explains the reduced number of cases if compared to WP1. Particular attention will be addressed to the construction of the sample, which we want to be as representative as possible of the whole phenomenon. Such sample will be balanced considering the following proportions, deriving from available evidence (Pasquinelli, Rusmini, 2013):

- Declared (about 40%) and undeclared workers;

- Migrant (90%) and Italian workers;
- Women (90%) and men;
- Live-in workers (about 60%) and daily workers.

To successfully obtain a sample respecting such proportions we will use two main sources:

1. Territorial agencies of ACLI Colf, that is the branch of ACLI assisting care workers: this is one of the main Italian agency offering assistance and consulting activities to domestic workers;
2. Territorial agencies of Caritas Italiana, which have a vast network of parish centres dealing with families and care workers, which will enable us to access the vast un-declared market.

We will focus on three areas: Milan, Varese and Bergamo. These represent different contexts in the region, as they are quite different in terms of urbanisation and consequent degree of family ties, which traditionally decrease and are more scattered in metropolitan areas.

Face-to-face interviews. The issues to investigate are summarised in the table in WP1. From a methodological point of view, we will use a semi-structured questionnaire, which will be delivered by trained interviewers. Face-to-face, direct interviews are needed in this case, as migrant care workers may have some reticence in giving out the information requested, as previous research has showed (Pasquinelli, Rusmini, 2013). Direct interviews can overcome, at least partially, this possible limitation. The interviewers will be selected by the research team and will be trained in both submitting the questionnaire and managing privacy issues.

Particular attention will be dedicated to the protection of privacy and anonymity. ARS will be the body “Responsible for processing the collected personal data”, according to Law 675/1996. Once carried out, interviews contact numbers will be deleted immediately. The answers to the various interviews will be uploaded to a special DB and will be processed and treated only as an aggregate. There will be no way to trace the answers for each record to the contacted person.

The result of this Work package will be given by a deliverable, a document of about 30 pages containing the survey findings, all connections with WP1 and their consequences in terms of policy recommendations.

Work package 4

A comparison between Lombardy, Italy, and the rest of Europe will enrich our understanding and help us reach our research goals. WP4 compares the caregiver role and wellbeing between Lombardy, Italy and Europe and the potential effect that constant provision of informal care may have on caregivers quality of life.

The ageing of the population and the greater longevity of individuals, which have characterized European countries in the last decades, will lead to increasing numbers of older people in need of long-term care. This need is partly met by formal care, either at home or in purpose-built structures. Frequently, however, eldercare is provided by informal caregivers who devote part of their time to assist their needy relative. This is especially the case in the Southern European countries, commonly referred to as “strong family-ties countries” in contrast to the “weak family-ties countries” of Northern Europe.

Starting from this premise, we will investigate how the cultural and socio-economic differences between Northern and Southern Europe may influence the life-quality of parental caregivers. We will test whether this relationship differs across European countries according to a North-South gradient. Indeed, while there is strong emphasis on family all throughout the continent, there is also substantial evidence of cultural differences between Northern and Southern Europe, which motivates such a focus. In our analysis, we will split the sample by gender: in spite of the changing gender attitudes and the rapid entry of women into the labour force over the past decades, women continue to play a major role in running the household and giving care to family members, as the previous literature on the traditional roles of women in Europe suggests. Women are therefore more exposed than men to the stress generated by informal caregiving. Furthermore, as the literature shows, men react differently than women to stressful experiences, and provide informal care in forms that are different from women (Di Novi et al, 2015; Brenna and Di Novi, 2016).

We will use data from SHARE (Survey of Health, Ageing and Retirement in Europe) for Wave 1 (2004), Wave 2 (2006/2007), Wave 4 (2011) , Wave 5 (2013) and Wave 6 (2016). This is a panel dataset of interviewees born 1960 or earlier and their partners covering Austria, Germany, Sweden, Netherlands, Spain, Italy, France, Denmark, Greece, Switzerland, Belgium. SHARE is a large representative micro data set providing detailed information on health, a variety of other socio-economic characteristics, family relationship and the region of residence (Nuts-2) of more than 30,000 over fifty in Europe. Thanks to the information on the residence we will be able to compare Lombardy with the rest of Italy and with Northern Europe.

In order to evaluate the potential effect that the provision of care may have on caregivers quality of life (QoL) we will use a functional indicator of wellbeing, the CASP-12. The CASP-12 questionnaire represents a psychometrically validated short version of the original 19-item version (CASP-19). It is a self-reported index built on a 12 item questionnaire organized in four-point Likert ascending scales. CASP-12 captures four dimensions of QoL: control (C), autonomy (A), self-realisation (S) and pleasure (P). The first letter of each domain and its 12 items create the acronym CASP-12. It provides an easily interpretable score ranging from 12 to 48, with higher scores indicating better QoL.

In order to account for potential endogeneity due to self-selection in the relationship between the provision of informal care and the informal caregivers' quality of life, we match each informal caregiver with a non-caregiver on each characteristic known to be associated with a caregiver's condition and quality of life (Caliendo and Kopeinig, 2005). In our analysis, we perform this matching by using propensity score, as formalized by Rosenbaum and Rubin (1983). The quality of life of matched individuals is then compared to estimate the average effect of being an informal caregiver.

Given the cultural differences between Northern and Southern Europe, we expect a large and significant impact of the North-South gradient on caregivers' self-reported CASP. In addition, we also expect to detect a gender effect, i.e. impacts of different magnitude between men and women, for a given level of caregiving.

WP4 findings will be put in relation with findings of WP 1, so to reach a compared picture of informal caregiving in Lombardy, along with the Northern-Southern Europe gradient. The result of this Work package will be given by a deliverable, a document of about 30 pages containing the comparative findings, all connections with WP1 and their consequences in terms of policy recommendations.

Dissemination³

Dissemination will begin from the inception of the project. In terms of **online tools** it includes:

- A new **web site**, specially dedicated to this project;
- Use of partners' web sites;
- Use of the national site www.welforum.it as a major communication vehicle, along with the project's web site (see the Dissemination Plan);
- A new section dedicated to the project within the www.welforum.it bi-monthly newsletter.

In the final steps of the project, through a dialogue between the project partners and its stakeholders (see attached letters of endorsement), with a RRI ("Responsible Research and Innovation") approach, we will produce a final document of about 20 pages in which we will highlight:

- Policy recommendations both for public policies and third sector organisations committed in activities in favour of caregiving, with regard to the research hypotheses.
- Contents of a new policy strategy to support family carers and care workers as a related network. It will propose a concrete model of an age friendly social welfare system, building on what already exists and going beyond existing limitations.

In terms of **off line tools**, dissemination will include:

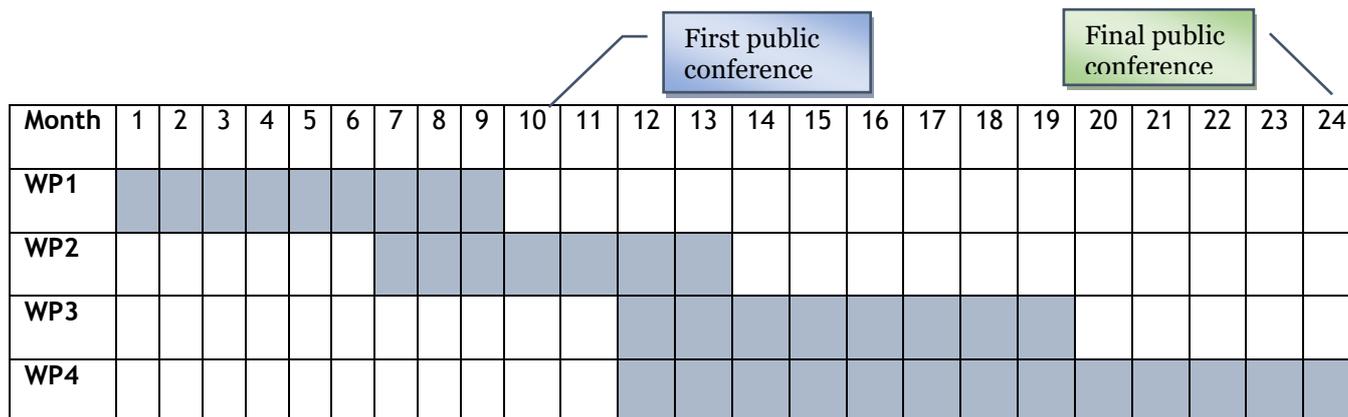
- a. A first, non academic conference at the end of WP1 and focused on the mainstreaming of its findings. Major public and third sectors organisation involved with elderly social welfare services will be invited to dialogue with main findings of WP 1;

³ For more detailed information, see the Dissemination plan.

- b. The publication of a book with the publisher Maggioli, collecting all project findings (we also plan to make it available on the web);
- c. A final public conference dedicated to the findings of all WP and in which we will involve main regional and national stakeholders involved with social welfare services for the elderly.

Targeted audience of public conferences. The conferences will be directed not only to an academic audience, but also and foremost to policy makers, public and third sector executives, social and health services’ practitioners. The Gantt that follows provides a tentative timetable of each WP and indicates when these conferences will take place, as outlined in the Dissemination plan.

Gantt of the project



Project originality

The findings expected will make a novel contribution to existing knowledge because the points of view we adopt are not routinely considered in generic assessment of caring activity. In fact this project:

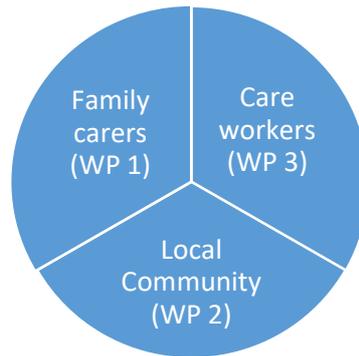
- Makes the first “double sided” effort to analyse the role of family carers and home care workers, with two twin surveys;
- Uses a systematic approach to understand how family and care workers can be better supported, with mutual benefits, considering the different roles and implications;
- Focuses on some-under-researched topic regarding caregiving, namely: the orientation, interest and availability toward shared care arrangements (e.g. with neighbours, peer-support, co-employment), and the use of technology and ICT by family carers and care workers.

Furthermore, this project proposes a comprehensive approach on caregiving, never carried to this date. It also plans one of the largest researches on informal caregiving in Italy.

We believe that the originality of this project can be summarized in its “holistic” approach.

This project deals with the issue of caring from different points of view. We want to put in relation these different points (as shown in the following figure): findings in each WP will influence and enrich other WP contents and findings. We believe that in doing so, overcoming the traditional way of dealing with them in separated ways, we can develop our knowledge on changes and on what can best be pursued. In the final months of the project we will build a framework that will enhance the evidence collected in all WP and their relations, so to recommend new policy priorities.

The following figure shows the complementarity of WP1, WP2 and WP3. WP4 will enrich our findings in comparative terms with Europe, using the SHARE database.



What is the advantage to carry out two “twin surveys”? Basically, it is to discover how formal and informal care complement each other, and the degree of correspondence between them. The final goal is to foster a better quality of assistance for the elderly. A specific consideration will then be given to those increasing situations in which seniors are alone, with weak or lacking family ties, and in which care workers’ role may shift from complement to substitute. What priorities need to be addressed in this case? This research will help in answering this crucial question.

Impact

This project will have an impact on the understanding of the caring process. It will bring new and fresh information on the specificity of Italy and Lombardy, with insights which can be of value at an international level.

It will offer elements on how to support frail elderly people, going beyond what we already know and specifically identify how the welfare system can be improved to sustain a healthy ageing in place. What we already know (Gori et al, 2015; Pasquinelli, 2015) is useful and important, but we need to advance our knowledge.

The study will have impacts at three levels.

1. **Scientific level:** the project will provide new evidence on caregiving. All WP will provide insights on the changing factors which can support ageing in place and we want to provide new insights in caregiving literature, based on the combined consideration of the point of view of different actors.

The dissemination plan provides details on how the evidence gathered will be reported and its potential be expressed and socialized. Preliminary findings of the project will be proposed for presentation at the “Transforming care conference”, to be held in Copenhagen in 2019; at the International Policy Network Conference on Long Term Care to be held at the London School of Economics in September 2020, and at annual conferences of the Italian Society of Health Economics.

A final book will be published, and least three papers deriving from this project will be submitted for publication in scientific journals: “European Journal of Population”, “Journal of European Social Policy”, “*Politiche Sociali*” and “*Prospettive Sociali e Sanitarie*”.

2. **Public policies:** we aim at identifying new policy priorities and help build a new agenda to support care for the elderly. Findings are also intended to help implementing regional Lombardy law number 15/2015. This law (called “*Interventi a favore del lavoro di assistenza e cura svolto dagli assistenti familiari*”) promotes caregiving in favour of the elderly, and care workers in particular, with a number of specific actions which still have to be implemented. As it plans a social monitoring analysis, this project suits very well to this purpose and may be of great usefulness.

Furthermore, at a national level, the findings of this project will provide useful information for the new national Fund for caregivers, which was enacted in November 2017 with an initial investment of 20 million euro per year for the 2018-2020 period.

3. **Third sector organisations:** for both partners (ACLI) and endorsing bodies of this project, we will produce useful evidence, which will permit to enrich their activity, from two points of view:
- In terms of relationship with public bodies and policies. Third sector organisations may find in this project new insights on which to build new priorities, advocacy new issues. Evidence from the project may help in opening new perspectives;
 - In terms of the care market, where the citizen is willing to pay for quality care services. The survey on care workers will offer many insights on what kind of services they are more most interested in.

The impact this project will generate is supported by the **letters of endorsement** (attached) signed by:

- The European Federation for Family Employment and Home Care;
- ACLI COLF - that is one of the main Italian network advocating care workers and their living conditions;
- INCA CGIL - that is the main "Patronato", along with ACLI, dealing with elderly people, and assisting them under many points of view, namely in the application for national care allowances;
- Confcooperative, which is the major umbrella organisation with hundreds of members, in particular social cooperatives, deeply involved in services for the ageing and ageing in place.

Young researchers

The project will give the opportunity to train six young researchers, as follows.

ARS will employ 3 junior researchers specifically for this project. One (Glenda Cinotti) is already working with ARS and will collaborate in WP1 and WP3. ARS will then employ 2 new interns, which will work on WP1 and WP3. They will be selected among students of University of Pavia and University of Milano Bicocca. Two more temporary collaborators will be employed for both work packages, with particular reference to WP1. They will be selected among post degree and post Phd young researchers.

These young researchers will improve their skills as they will be trained in:

- Field work organisation and coordination;
- Data elaboration and analysis;
- Data interpretation and report writing and editing;
- Dissemination activities.

University of Pavia will train one post degree young researcher, within WP4. Furthermore, ongoing evidence emerging from the project will be used by the University of Pavia team in the following teaching programs:

- The Master Program (Laurea Magistralis) in Economics, Finance and International Integration (MEFI);
- The Public Economy class within the major Degree in Economics and Health Economics;
- The DREAMT (Dottorato in Economia Applicata, Management), in a class on Health Economics.

ACLI Lombardia will employ two young researchers to carry out and support research activities planned in WP2. These young researchers will be trained in a joint effort among ARS and ACLI staff project.

For all project partners, our career policies are oriented to give effective opportunity of employability to young researchers, and to progressively internalise their skills. To this respect, we consider this project as an important opportunity to strengthen, with new competences, our applied research units. Young researchers will participate in the major internal meetings of the project with all partners and will have responsibilities in field research, data analysis, writing of reports.

As an overall, we consider this project will generate concrete opportunities for an important number of young researchers, all aged under 35 years old.

Research organisations and lab facilities

ARS - Associazione per la Ricerca Sociale

Association for Social Research (ARS), founded in 2001, is a nonprofit association with the goal to broaden our knowledge of social interest issues not adequately addressed by the academic and applied research. The object of the Association is to promote the culture, in training, in publishing, scientific research of particular social interest. The Association works independently or in collaboration with universities and research institutes of recognized professional organisations. ARS has been involved in - and has promoted - several projects on ageing of population. For a full list see: <http://www.infoars.it/lavori.html>

ACLI Lombardia

ACLI Lombardia, the regional body of ACLI (Italian Christian Workers' Associations), is a civil society organization mainly active in the field of civil and social rights' promotion, educational and welfare policies, active citizenship and volunteering.

Operating through thematic associations and specific services, ACLI Lombardia's activities involve families, youngsters, elders and disadvantaged groups such as migrants, unemployed people, drop outs, citizens who find themselves in social and economic difficulties. In Lombardy ACLI in 2017 has had more than 69.000 people associated in 500 local associations. Regarding elder people and their competences and needs, ACLI Lombardia promotes:

- activities and initiatives that see this group of population as co-actors and targets: the local associations engage more than 51.000 citizens with 65 years or more and about 9.500 people from 45 to 65 (potential and actual caregivers);
- activities to support elders' pension and social rights: our specific association ("F.A.P.") counts more than 9.200 associates in 2016;
- services to support elders' people in the acknowledgment of their civic and welfare rights and in finding answers to their social needs. Our "Patronato", that is counseling and supporting service for fiscal and social care needs is the first in Lombardia, as it serves 1/4 of the total users of such counseling services in Lombardy. This will give a big base of representativeness to WP 1 of this project.

University of Pavia

The University of Pavia is one of the oldest universities in Europe. Today Pavia is a Research University, offering a wide variety of disciplinary and interdisciplinary teaching organized in nine faculties.

The Department of Economics and Management offers a wide range of courses in Italian and in English, as well as the opportunity to participate in experiences abroad through apprenticeships and double degrees with noted foreign universities. The educational project is characterized by a solid anchoring to a system of knowledge and skills that derive both from the disciplines of basic economic and business areas, both by the essential contributions of the interdisciplinary areas of legal and quantitative, historical and sociological, computer science and linguistics, the integration of these different disciplines gives students the opportunity to assess and develop their specific skills.

Research team

The research team will be directed and coordinated by ARS.

The project's effective organisation will be guaranteed by a Coordination Group including all partners, directed by ARS, which will assure coordination between all parts of the project, dialogue between all WP, harmonization in research approach and coordination in research findings. The Coordination Group will meet periodically and upon necessity, at least once every two months. Bilateral meetings between partners will also take place, especially for the WP in which two of them are included.

Multidisciplinary skills: the Research team include five different disciplines: sociology, gerontology, economy, statistics and psychology:

Sociologists	Sergio Pasquinelli (Principal Investigator- ARS) Giselda Rusmini (ARS) Giuseppe Imbrogno (ACLI Lombardy)
Gerontologist	Fabrizio Giunco (ARS)
Statistician	Claudia Tarantola (Univeristy of Pavia)
Economists	Cinzia Di Novi (Univeristy of Pavia) Elenka Brenna (Univeristy of Pavia) Daniela Mesini (ARS)
Psychologist	Ugo De Ambrogio (ARS)

Personal Data			
<i>Surname</i>	<i>Name</i>	<i>Organization and Position</i>	<i>Date of birth</i>
Pasquinelli	Sergio	ARS - Associazione per la Ricerca Sociale - Director of Research	6th September 1960
Education and training			
<p><i>Degree in Sociology, Università degli Studi di Milano, 1985.</i></p> <p><i>Senior Research Fellow, Johns Hopkins University, Institute for Policy Studies, Baltimore, USA, 1993-94</i></p>			
Research and Professional experience			
<p><i>2005-2010: Professor of Social Policy, University Ca' Foscari of Venice.</i></p> <p><i>Project leader, with tasks on research, training and promotion within personal social services.</i></p> <p><i>Founder and director of the web site www.qualificare.info , national online site on LTC - lont term care policies, formal and informal caregiving.</i></p> <p><i>Director of research at ARS, with direction responsibilities on research and consulting projects regarding the elderlies.</i></p> <p><i>“Consigliere direttivo” of ARS - Associazione per la Ricerca Sociale, Milano.</i></p> <p><i>Deputy Director of the national “Observatory on Italian social policies” promoted by ARS: www.welforum.it</i></p> <p><i>Deputy director of the scientific journal “Prospettive Sociali e Sanitarie”.</i></p>			
Scientific Publications and Congresses or other Oral Communications			
<p><i>Total publications: 8 books and over 50 articles.</i></p> <p><i>Citations: 130</i></p> <p><i>H index: 6</i></p> <ul style="list-style-type: none"> ➤ <i>Primo Rapporto sul lavoro di cura in Lombardia, (a cura di), Maggioli Editore, 2015.</i> ➤ <i>Badare non basta. Il lavoro di cura: attori, progetti, politiche (a cura di), Roma, Ediesse, 2013.</i> ➤ <i>The Potential of ICT in supporting Immigrants in Domiciliary Care in Italy</i>, European Commission Joint Research Centre, Institute for Prospective Technological Studies, Report 2010. ➤ <i>Buoni e voucher sociali in Lombardia</i>, (a cura di), Milano, Franco Angeli, 2006. ➤ <i>Privatization in Four European Countries. Comparative Studies in Government-Third Sector Relationships</i>, (with R. Kramer, H. Lorentzen e W. Melief), New York, M. E. Sharpe, 1993. <p><i>Last communication at International Congress: “Collaborative welfare practices: evidence beyond</i></p>			

the storytelling”, paper presented at the “Transforming Care” Conference, Polytechnic of Milan, 27 June 2017.

Grants

In the last 3 years, I have directed research projects supported by Grants from: European Union, Ministry of Interiors, Regione Lombardia, Regione Liguria, Regione Toscana, Regione Abruzzo, Regione Puglia, Provincia di Bolzano, Fondazione Cariplo, Fondazione Cassa di Risparmio di Cuneo, Isfol, Confcooperative, among others.

Role in the project

<i>Role</i>	<i>Total Effort (person/months)</i>
<i>Principal Investigator</i>	<i>24 months</i>

Personal Data

<i>Surname</i>	<i>Name</i>	<i>Organization and Position</i>	<i>Date of birth</i>
<i>Rusmini</i>	<i>Giselda Lucia</i>	<i>ARS - Associazione per la Ricerca Sociale Senior Researcher</i>	<i>8th January 1972</i>

Education and training

Academic studies:

2009 - 1st level Master's degree in Social Planning, Politecnico di Milano (Italy)

2001 - Four year degree in Sociology, University of Trento (Italy)

Other postgraduate studies:

2002 - Advanced training course “Interviewing techniques”, University of Milan-Bicocca (Italy)

Research and Professional experience

January 2005 - Today

Istituto per la Ricerca Sociale – Social Researcher

Collaboration in research and consulting, especially in the elderly and long-term care sectors. Among the many projects on which I worked, I report:

- *“Primo Rapporto sul lavoro di cura in Lombardia” (2014-2015)
The study focuses on the provision of care for frail elderly people in Lombardy and on its changes. It analyses regional interventions, public services, family caregiving and informal care work.*
- *“Over to Over” (Cross-border Cooperation Program Italy-France Maritime 2007-2013)
Project aimed to strengthen policies in support of families with dependent older people in Tuscany, through the development of real estate assets.*
- *European Project Equal II phase “Qualifying informal care work” (2005-2007)
Project aimed at creating an organic knowledge on informal caregiving in Lombardy, and test a service model aimed at promoting skills and the emergence of irregular care work, performed mainly by immigrant women.*

February 2015 – Today

Network Non Autosufficienza (N.N.A.) – Social Researcher

Collaboration in the coordination and drafting of the volumes aimed to provide a framework of knowledge about the status of policies and interventions for frail elderly people in Italy, and propose courses of action to improve them (www.maggioli.it/rna).

Scientific Publications and Congresses or other Oral Communications

<ul style="list-style-type: none"> • Pasquinelli S., Rusmini G. (2016), Il lavoro di cura in Lombardia, in <i>Economia & Lavoro, The Long-Term Care</i>, settembre-dicembre, n. 3, pp. 97-114. • Gori C., Rusmini G. (2015), <i>La rete dei servizi sotto pressione</i>, in N.N.A., a cura di, L'assistenza agli anziani non autosufficienti in Italia. Quinto Rapporto, Rimini, Maggioli, pp. 57-86. • Gori C., Rusmini G. (2015), <i>Politiche regionali: tendenze in atto al Centro-nord</i>, in N.N.A., a cura di, L'assistenza agli anziani non autosufficienti in Italia. Quinto Rapporto, Rimini, Maggioli, pp. 147-184. • Gori C., Ghetti V., Rusmini G., Tidoli R. (2014), Il welfare sociale in Italia. Realtà e prospettive, Roma, Carocci (2^a ristampa 2015). • Pasquinelli S., Rusmini G., a cura di (2013), Badare non basta. Il lavoro di cura: attori, progetti, politiche, Roma, Ediesse. 	
Grants	
Whether it is the case, indicate title, duration and amount of the grants achieved and those still running.	
Role in the project	
<i>Role</i>	<i>Total Effort (person/months)</i>
Senior Researcher in WP1 and WP3	8

Personal Data			
<i>Surname</i>	<i>Name</i>	<i>Organization and Position</i>	<i>Date of birth</i>
Imbrogno	Giuseppe	ACLI - Social planner and project manager	7 th May 1976
Education and training			
<p>ASVAPP - Association for the development of public policies' analysis and evaluation Field Of Study Implementation analysis, impact evaluation in public policies 2017</p> <p>AICCON Research Institute on Cooperation and Social Economy at University of Bologna Field Of Study Civic economy, hybrid organizations, social impact 2016</p> <p>Studio APS Field Of Study Organizational analysis and development 2009</p> <p>SDA Bocconi Master's degree, Non profit organisations' management 2000-1</p> <p>Philipps-Universität Marburg Scholarship, Philosophy 1998 - 2000</p> <p>Università degli Studi di Milano Degree, Philosophy 1995 - 2000</p>			
Research and Professional experience			
<p>Since the beginning of my professional career I've been curious and interested in social processes' and organizations' development. Although I've been working both in the profit and non-profit sector, the latter has become in the years my main field of knowledge and expertise.</p> <p>Today I'm senior program manager and responsible for the development of innovative welfare services and activities for the regional body of ACLI, one of the main non-profit organizations in Italy. Since my first collaboration with ACLI Lombardia, the organization has more than doubled its projects, personnel and annual budget. My main areas of interest and expertise are: social planning, project management and budgeting; social change and impact assessment and evaluation; first and second welfare, social and educational policies; national and EU funding, public-private financing;</p>			

organizational analysis and consulting, business planning, business modeling, service design.	
Scientific Publications and Congresses or other Oral Communications	
Indicate the total number of publications and h-index. Please list a selection of the peer-reviewed publications more relevant to the project (maximum 5 indexed publications).	
Grants	
Whether it is the case, indicate title, duration and amount of the grants achieved and those still running.	
Role in the project	
<i>Role</i>	<i>Total Effort (person/months)</i>
Responsible in WP2	5

Personal Data			
<i>Surname</i>	<i>Name</i>	<i>Organization and Position</i>	<i>Date of birth</i>
Fabrizio	Giunco	Clinical director, Palazzolo Geriatric Institute, Don Carlo Gnocchi Foundation, Milano	29th August 1957
Education and training			
<ul style="list-style-type: none"> • 1982: Degree in Medicine and Surgery; Final grade: 110/110 <i>cum laude</i> (top grade); University of Pavia, Italy • 1988: Post-degree advanced course in Gastroenterology and Digestive Endoscopy (Residency post-graduate program, 4 years). Final grade 28/28 (top grade), University of Milan, Italy • 1996: Qualification in medical education and training in general practice, European School of General Practice, Firenze, Italia • From 10/06/1998 to 15-09-2000: Post-graduate master course in Medical Research (two years), Mario Negri Institute for Pharmacological Research, Milan, Italy • From 10-01-2006 to 10-01-2009: Post-graduate master course in clinical counselling (three years), REF association, Via Morimondo 15, Milan, Italy. Certified by Italian Society of Counselling. 			
Research and latest Professional experience			
<ul style="list-style-type: none"> - From 2013 → Clinical director, head of inpatients, outpatients and home care integrated services for frail and disabled elderly. Head of specialized outpatients services for mild-cognitive impairment and dementia patients, Palazzolo Geriatric Institute, Don Carlo Gnocchi Foundation, Via Don Luigi Palazzolo 21, Milano, Italy - From 2004 → Member of the Ethics Committee, Don Carlo Gnocchi Foundation, Piazzale Morandi, 6 20162 Milano, Italy - From 2017 → Professor in post graduate Master's degree course "Palliative care and pain therapy", University of Trieste, Piazzale Europa, Trieste (TS) - From 2016 → Member of permanent working group for health and social services regulation, Lombardy regional government, Welfare directorate, Piazza Città di Lombardia 1, 20124 Milano - From 2015 → Digital Environment for Cognitive Inclusion (DECI) project, UE, Horizon 2020, PHC 20-2014: Advancing active and health aging with ICT; ICT solutions for independent living with cognitive impairment - From 02/2013 to 31/12/2013: Member of the scientific board of the project: "Pilot application of the InterRai suite in 4.000 residents of Nursing Homes in Lombardy" (Italian Society of Geriatrics and Gerontology), Italian Society of Geriatrics and Gerontology and Family and Social Solidarity Directorate of Regional Government of Lombardia - From 1/1/2012 to 31/12/2013: Scientific director of the project: "Independent and Assisted 			

<p>Living for the Elderly”. Cariplo Foundation and Social Housing Foundation, Milan</p> <ul style="list-style-type: none"> - From 1-1-2012 → Member of the Scientific Committee of the Palliative Care Research Center. Head of the Working Group: “End-of-life care in neurological diseases and dementia” , University of Milan, Via Festa del Perdono, 7, 20122 Milan, Italy - From 1-1-2010 → Member of the working group “Lombardia Sociale” (Head Cristiano Gori), Lombardia Sociale (www.lombardiasociale.it) e Istituto per la Ricerca Sociale (ARS), Milan 	
Latest Scientific Publications	
<ul style="list-style-type: none"> • Giunco F. In McCormack E. Assessing the Socioeconomic impact of Alzheimer’s Disease in western Europe and Canada. The Economist Intelligence Unit, 26 April 2017. https://www.eiuperspectives.economist.com/healthcare/assessing-socioeconomic-impact-alzheimers-disease-western-europe-and-canada/white-paper/assessing-socioeconomic-impact-alzheimers-disease-western-europe-and-canada. © The Economist Intelligence Unit Limited 2017 • Jenny T. van der Steen, Paola Di Giulio, Fabrizio Giunco, Massimo Monti, Simona Gentile, Daniele Villani, Silvia Finetti, Francesca Pettenati, Lorena Charrier, Franco Toscani, on behalf of the End of Life Observatory-Pro prospective Study on DEmentia Patients Care (EoLO-PSODEC) Research Group. Pneumonia in Nursing Home Patients With Advanced Dementia: Decisions, Intravenous Rehydration Therapy, and Discomfort. Am J Hosp Palliat Care, 2017 Jan 1:1049909117709002. doi: 10.1177/1049909117709002. [Epub ahead of print]. PMID: 28532225 • Sattin D, Schnakers C, Pagani M, Arenare F, Devalle G, Giunco F, Guizzetti G, Lanfranchi M, Giovannetti AM, Covelli V, Bersano A, Nigri A, Minati L, Rossi Sebastiano D, Parati E, Bruzzone M, Franceschetti S, Leonardi M. Evidence of altered pressure pain thresholds in persons with disorders of consciousness as measured by the Nociception Coma Scale-Italian version. Neuropsychol Rehabil. 2017 Feb 28:1-16. doi: 10.1080/09602011.2017.1290532. [Epub ahead of print] • Giunco F. Abitare nella vecchiaia. Spiritualità e Qualità di Vita 2016, anno 1, n. 2 • Toscani F. Van Der Steen J. Finetti S. Giunco F. Pettenati F. Villani D. Monti M. Gentile S. Charrier L. Di Giulio P. Critical Decisions for older people with advanced dementia: a prospective study in long-term institutions and district home-care. End of Life Observatory-Pro prospective Study on Dementia Patients Care (EoLO-PSoDEC) Research Group. JAMDA 2015. Accettato per la pubblicazione: http://dx.doi.org/10.1016/j.jamda.2015.02.012. 	
Latest Grants	
National research projects:	
<ul style="list-style-type: none"> - Digital Environment for Cognitive Inclusion (DECI) project. UE, Horizon 2020, PHC 20-2014: Advancing active and health aging with ICT; ICT solutions for independent living with cognitive impairment. Head of Don Carlo Gnocchi Foundation activities in DECI Consortium. The study analyzes the role of home technology in improving quality of life and social inclusion of dementia patients living in the community. DECI consortium involves eight partners: Politecnico di Milano (Coordinator center); Consoft Sistemi SPA (Italy); Don Carlo Gnocchi Foundation (Italy); Centre for Healthcare Improvement, Chalmers University of Technology (Sweden); Skaraborg Hospital Group, Vastra Gotalandsrgionen (Sweden); Servicio Madrilenio de Salud, Hospital Universitario de Getafe, Servicio de Geriatria (Spain); Maccabi Healthcare services (Israel); Roessing Research and Development, Research Institute for Rehabilitation Technology and Telemedicine (The Netherlands). - “Pilot application of the InterRai suite in 4.000 elderly living in Nursing Homes in Lombardy”. Italian Society of Geriatrics and Gerontology in partnership with local government of Regione Lombardia. Clinical director Gianbattista Guerrini. Fabrizio Giunco was in the scientific board. Milano, 2014 - “Efficacy of pain therapy in Alzheimer disease and other types of dementia at the end of the life”. “Lino Maestroni” Foundation, Scientific director Franco Toscani. Fabrizio Giunco is in the scientific board. Cremona, 2013 - “Independent living and assisted living for the elderly” A survey on independent and assisted living facilities in Lombardia. With a grant of Cariplo Foundation and in partnership with Social Housing Foundation, Milan. Scientific Director, Fabrizio Giunco. Milano 2014 	
Role in the project	
Role	Total Effort (person/months)
Scientific consultant and Senior researcher in WP1 and WP3	3

Personal Data			
<i>Surname</i>	<i>Name</i>	<i>Organization and Position</i>	<i>Date of birth</i>
Tarantola	Claudia	Associate Professor of Statistics, Department of Economics and Management, University of Pavia	2nd March 1970
Education and training			
<ul style="list-style-type: none"> - 1995: Degree in Political Economy, Summa cum Laude, University Bocconi, Milan, Italy. Dissertation title “Graphical models for multivariate statistics”; advisors Professor. Guido Consonni and Professor Paolo Giudici. - 1998: Visiting student at the Department of Mathematics of University of Bristol, UK. She worked under the supervision of Professor. Peter J. Green on Bayesian computational methods for discrete graphical models. - 1999: PhD in Methodological Statistics, University of Trento. Thesis title “Bayesian model determination for discrete graphical models”; advisors Professor Guido Consonni and Professor Paolo Giudici. - 1998- 1999: Post-doctoral fellows under the European Union project TMR (Training and Mobility of Researchers) entitled “Statistical and Computational Methods for the Analysis of Spatial Data”. Project coordinator Professor. Petros Dellaportas. 			
Research and Professional experience			
TEACHING EXPERIENCES			
<ul style="list-style-type: none"> • From Academic year 2015/2016. “Statistics” (9 ECTS), group A-K. • Academic year 2012/2013. Lecturer of the first module of the course of Statistics for PhD Program in Economics and Management (DREAM) of the Department of Economic and Management. • From Academic year 2008/2009 “Social Statistics” (6 ECTS). • Academic year 2011/2012. first module of Statistics (3 ECTS) for the course of Statistics (group L-Z) • From Academic year 2006/2007 until Academic year 2009/2010: “Data analysis” (group A-K) (5 ECTS). • From Academic year 2001/2002 until Academic year 2008/2009: “Statistics for social application” (4 ECTS). • Academic year 2005/2006: Tutorials for the course of “Data analysis” (group L-Z). • Academic year 2004/2005: Professor of “Social Statistics” for the Master course in “Medical Diagnostic Techniques” and the master course in “Assistance Techniques” by the faculty of Medicine (3 ECTS). • From Academic year 2002/2003 until Academic year 2002/2003: Professor on contract at Bocconi University of Milan for the semestral course of Statistics. (8 ECTS). • Academic years 1999/2000 and 2000/2001: professor of Statistics for the Master course in “Banking and Finance Development”, organised by the “Giordano dell’Amore” foundation of Milano (in English) 			
Scientific Publications and Congresses or other Oral Communications			
<p><u>Citation Index</u></p> <p>Citations 148</p> <p>H index 7</p> <p><u>Peer-reviewed publications</u></p> <ul style="list-style-type: none"> • Bassetti, F., De Giuli, M.E. , Nicolino, E. and Tarantola, C. (2018) Multivariate Dependence Analysis via Tree Copula Models: an Application to Energy Market ; European Journal of Operational Research, in press, doi: 10.1016/j.ejor.2018.02.037 , in press 			

<ul style="list-style-type: none"> • Agresti, A., and Tarantola, C. (2018) Simple Ways to Interpret Effects in Modeling Ordinal Categorical Data, <i>Statistica Neerlandica</i>, DOI:10.1111/stan.12130, in press • Kateri, M. Gottard, A. e Tarantola, C. (2017) Generalized Quasi Symmetry Models for ordinal Contingency Tables, <i>Australian & New Zealand Journal of Statistics</i>, 59, 239-253 • Tarantola, C., Ntzoufras, I, and Lupparelli, M. (2013) Comment: Graphical marginal log-linear models- a Bayesian perspective, <i>Sociological methodology</i>, 43 (1), 109-113. • Dalla Valle, L., De Giuli, M.E., Tarantola, C., and Manelli, C. (2016), Default Probability Estimation via Pair Copula Constructions, <i>European Journal of Operational Research</i>, 249, 298-311, ISSN: 0377-2217. 	
Grants	
<u>National research projects</u>	
<ul style="list-style-type: none"> - 2014-2016. Coordinator of the research project “Multivariate Statistical Analysis for Extreme Value Risk Management in Energy Markets”, financed by ENEL S.P.A. - . 2007-2009. Member of the PRIN-COFIN grant “Graphical models with latent classes for panel data: methodological development and applications in the field of instruction and health”, national coordinator Prof. G. Consonni. - 2005-2007. Member of the PRIN-COFIN grant “Marginal models for categorical variables with application to causality”, national coordinator Prof. G. Consonni. - 2003-2005. Member of the PRIN-COFIN grant “Bayesian networks and causal inference: methods and applications”, national coordinator Prof. G. Consonni. 	
Role in the project	
Role	Total Effort (person/months)
Researcher in WP4	6

Personal Data			
Surname	Name	Organization and Position	Date of birth
Di Novi	Cinzia	Assistant Professor, Department of Economics and Management, University of Pavia	18th July 1979
Education and training			
<ul style="list-style-type: none"> - 2008 Ph.D in Economics, University of Turin. Ph.D. Supervisors: Prof. Ugo Colombino and Prof. Gilberto Turati. Dissertation title: “On the Determinants of Human Health: An Economic Perspective”. - 2004 Master in Economics, CORIPE Piemonte (University of Turin, Italy). - 2003 Bachelor in Political Sciences, University of Eastern Piedmont, Italy. Final mark 110/110 cum laude, print worthy. Dissertation title: “Regolazione dei Prezzi o delle Quantità: il Modello di Weitzman e Alcuni Sviluppi”, Supervisor: Prof. Mario Ferrero. 			
Research and Professional experience			
TEACHING EXPERIENCES			
<ul style="list-style-type: none"> - 2017-2018 Health Economics, University of Pavia; - 2017 Master “Advance Pharmaco & Health Economics” (APHEC), University of Genoa, lectures on health econometrics; - 2017 Health Economics, Policy and Management, PhD in Applied Economics and Management (AEM), University of Pavia and Bergamo; - 2016-2017 Public Economics, University of Pavia; - 2016-2017 Master in Economics, Organization and Management of Healthcare Purchasing, University of Pavia, lectures on health economics and population aging; - 2016 Welfare Economics, Ca’ Foscari University of Venice; - 2012-2016 Economics of Art and Culture, Ca’ Foscari University of Venice; 			

- 2014-2016 Master in Health Economics and Politics at Consortium for Research and Continuing Education in Economics - CORIPE, University of Turin, lectures on health economics, health production, health insurance and pharmaceutical industry;
- 2015 Lectures on pharmaceutical industry, AbbVie pharmaceutical company (Milan and Rome) in collaboration with University of Milano- Bicocca;
- 2013-2015 Master in Health Economics and Management, Ca' Foscari University of Venice, lectures on pharmaceutical industry, health insurance, and population aging;
- 2014-2015 Master in Market Access in Life Science, University of Milano- Bicocca, lectures on pharmaceutical economics;
- 2014 Master in Public Administration, Ca' Foscari University of Venice, lectures on health economics, health econometrics;
- 2013- 2014 Lectures on pharmaceutical industry, Bristol-Myers and Merck pharmaceutical company (Milan and Rome);
- 2012 Master in Health Science, Patients Academy project, promoted by Pfizer pharmaceutical company and Catholic University of Sacred Heart (Rome), lecture on Healthcare Systems;
- 2012 Public Finance, Ca' Foscari University of Venice;
- 2011 Health Economics, Catholic University of Sacred Heart, Milan;
- 2008-2011 Public Economics, University of Turin;
- 2007-2008 Advanced Macroeconomics (Growth Theory), University of Eastern Piedmont, Alessandria.

Scientific Publications and Congresses or other Oral Communications

Citation Index

Citations 147

H index 6

Peer-reviewed publications more relevant to the project

- Carrieri, C. Di Novi, C. E. Orso (2017) "Home Sweet Home? Public Financing and Inequalities in the use of Home Care Services in Europe", *Fiscal Studies*, 38: 445-468
- E. Brenna, C. Di Novi, (2016) "Is caring for elderly parents detrimental for women's mental health? The influence of the European North-South gradient", *Review of Economics of the Household*, 14: 745-778.
- C. Di Novi, R. Jacobs, M. Migheli, (2015) "The quality of life of female informal caregivers: from Scandinavia to the Mediterranean Sea," *European Journal of Population*, 31: 1-27.
- C. Di Novi, A. Marenzi (2013), "Chi si occuperà degli anziani nel «Vecchio» Continente: il profilo dell'informal caregiver secondo il gradiente Nord-Sud", in D. Rizzi - F. Zantomio (a cura di) *Analisi e strumenti di politica sociale*, Edizioni Ca' Foscari - Collana Politiche Sociali Studi e ricerche, pp. 220-246 (ISBN 978-88-97735-46-5).
- E. Brenna, C. Di Novi (2013), "L'influenza dell'informal care sulla salute psichica delle donne over-50: evidenze basate sulla scala di depressione EURO-D", in D. Rizzi - F. Zantomio (a cura di) *Analisi e strumenti di politica sociale*, Edizioni Ca' Foscari - Collana Politiche Sociali Studi e ricerche, pp. 247-268 (ISBN 978-88-97735-46-5).

Grants

- 2015 Grants for the participation to the meeting of the European Public Choice Society, Groningen, Netherlands € 1000 duration 5 days;
- 2013 FarmaFactoring Foundation Financial Support for the project "Explaining Inequalities in Health and Healthcare Access: the Role of Regional Differences in Healthcare Services and Expenditure" € 10000 duration 1 year;
- 2011 FarmaFactoring Foundation Financial Support for the project "The Impact of the North-South Gradient on the Informal Caregivers Mental and Physical Health in Italy" € 17000 duration 1 year;.
- 2011 Alan Williams Fellowship, Centre for Health Economics, University of York, project title "Insecure, sick and unhappy? Well-being consequences of temporary employment contracts", pounds 5000 duration 6 months.

Role in the project	
<i>Role</i>	<i>Total Effort (person/months)</i>
Researcher in WP4	8

Personal Data			
<i>Surname</i>	<i>Name</i>	<i>Organization and Position</i>	<i>Date of birth</i>
Brenna	Elenka	Teaching professor and Senior researcher, Department of Economics and Finance Università Cattolica del Sacro Cuore	8th of August, 1966

Education and training
<p>1993: Degree in Economics, Università Cattolica del Sacro Cuore, Milan.</p> <p>1996: M.Sc. in Health Economics, University of York, UK, supported by a scholarship from the Ministry of the Interior. Thesis subject: "The use of ARIMA models in the economic evaluation of health technologies".</p> <p>2000: Research Ph.D. in Economics, University of Trento, Department of Economics. Thesis subject: "The health costs for acute pesticide intoxication; an empirical analysis".</p> <p>Main Training Activities</p> <p>2017: University of York (UK): Methods in Economic Evaluation for HTA - Regression Course - 22nd - 24th March 2017</p> <p>2014: 14-17 July: Summer School in Health Econometrics, Università degli Studi di Bergamo.</p> <p>2006: 16-20 March, Econometrics laboratory in Airolo, Switzerland, within the International Doctoral Courses in Health Economics and Policy, University of Lugano</p>

Research and Professional experience
<p>Current Position</p> <ul style="list-style-type: none"> Lecturer in Microeconomics and Health Economics - Department of Economics and Finance - Università Cattolica del Sacro Cuore, Milano. Senior researcher in Health Economics, Welfare Economics and Public Economics. Consultancy for public (Ministry, European Union, Regions, Public Administration), and private (Research Centres, Pharmaceutical Industries), Organizations. <p>Teaching Experience</p> <ul style="list-style-type: none"> 2002- 2018: Course of Health Economics Università Cattolica of Milan, Department of Economics and Finance 2013-2017 : Microeconomics, Università Cattolica of Milan, Department of Economics 2017-2018: Health Economics, University of Milan, Faculty of Medicine 2011: Microeconomics, University of Milan, Faculty of Medicine 2006- 2008: Advanced Health Economics Università Cattolica of Rome, Faculty of Economics. 2002 -2006, University of Verona: Health Economics 2016, one day Course of Health Care Systems and Italian NHS for Adecco 2015 two days courses of Health Technology assessment for ABBVIE. 2015 Rome; one day course of Pharmaco-economics for BMS 2013: one day course on Health care financing and expenditure Master in Public Finance, Ministero dell'Economia e delle Finanze, Scuola Superiore dell'Economia e delle Finanze, Roma. From 2013 to 2015: Università Torvergata, Roma: lectures of Health Economics, Master Economia e Gestione in Sanità. <p>Coordination and collaboration in Research projects, organization of workshop and seminars, in the last 3 years:</p> <ul style="list-style-type: none"> 2017, senior researcher within the European Project: COST Action 15111 European Network on Myalgic Encephalomyelitis/Chronic Fatigue Syndrome (EUROMENE), Working

Group 3 (socioeconomics).

- 2016, 27 May: international workshop HALM “Household Economics in an Ageing Society” Università Cattolica SC, Milan, coordination and organization.
- 2015: senior researcher within the international research team: HALM - Healthy Ageing and the Labor Market <http://progetti.unicatt.it/progetti-ateneo-halm-home>.
- 2014 - “The financing and expenditure for the elderly in the Lombardy region”, senior researcher, project committed by Istituto Ricerca Sociale, Milano

Memberships

- Member of HESG (Health Economists Study Group) UK since 1995
- Member of AIES (Italian Association of Health Economics) since 1995. Member of the **executive Committee** since 2015.
- Member of International Health Economic Association (iHEA)
- Accredited as a journalist by the Lombardy Journalist Association.

Scientific Publications and Congresses or other Oral Communications

H index: 4

Total citations: 87

Total number of publication in indexed review: 43

Books' chapters and recent working papers: 8

5 publications more relevant to the project:

- Brenna E., Gitto L. (2017) Long-term care and elderly care in Europe: are they good synonyms? Rivista Internazionale di Scienze Sociali, 3/2017.
- Brenna E, Gitto L. (2017) To what extent is long-term care representative of elderly care? A case study of elderly care financing in Lombardy, Italy. Int J Health Policy Manag. 2017;6(x):x-x. doi:10.15171/ijhpm.2017.22
- Brenna E. (2015), Il finanziamento e la spesa, in (a cura di) Pasquinelli S., Primo rapporto sul lavoro di cura in Lombardia, p. 109-133, Maggioli editore, ISBN 978-88916-1160-4 <http://www.maggioli.it/lombardiachecura/>
- 2015- Brenna E. Di Novi C.: Is caring for older parents detrimental to women's mental health? The role of the European North-South gradient, Review of Economics of the Household, May 2015- DOI 10.1007/s11150-015-9296-7- Print ISSN1569-5239, Online ISSN 1573-7152
- E. Brenna, C. Di Novi (2013), “L'influenza dell'informal care sulla salute psichica delle donne over-50: evidenze basate sulla scala di depressione EURO-D”, in D. Rizzi - F. Zantomio (a cura di) Analisi e strumenti di politica sociale, Edizioni Ca' Foscari - Collana Politiche Sociali Studi e ricerche, pp. 247-268 (ISBN 978-88-97735-46-5).

PRESENTATION AT CONFERENCES AND SEMINARS (LAST YEAR):

- **London**, 26- 27 October 2017 The Fourth Annual Conference and Awards Ceremony for The European Society For Person Centered Healthcare, Westminster Cathedral Hall London, *The care and cost of ME/CFS: the Euromene project*, jointly with Lara Gitto
- Pavia, 5-6-October 2017, XXII National Conference AIES, Healthcare tax credits: *Financial help to taxpayers or support to higher income and better educated patients? Evidence from Italy*
- Pavia, 5-6-October 2017 (jointly with Lara Gitto) *Chronic Fatigue Syndrome(CFS/ME): a case study within the European project COST ACTION EUROMENE*
- Catania, 21-22 September 2017, XXIX Annual SIEP Conference - *Healthcare tax credits: financial help to taxpayers or support to higher income and better educated patients? Evidence from Italy*
- Pavia, 25th May 2017, *Healthcare tax credits: financial help to taxpayers or support to higher income and better educated patients? Evidence from Italy*. Internal seminar,
- **London**, 16th - 19th February 2017: 2017 International Health Policy Conference, London School of Economics, poster presentation jointly with L. Gitto, “Long-term care in Europe and elderly care: are they good synonyms?”
- **Berlin**, 26th 27th January 2017, COST ACTION Euromene Meeting, oral presentation: The economic burden of Chronic Fatigue Syndrome/Myalgic Encephalomyelitis (CFS/ME): a comprehensive summary of the existing evidence, jointly with L. Gitto

Grants	
<ul style="list-style-type: none"> - 2017: Grants for the participation to the European COST meeting (Euromene) held in Berlin, on the social cost of Chronic fatigue syndrome - 1995: annual grant from the Ministry of the Interior financing an MSc in health Economics by the University of York, UK 	
Role in the project	
Role	Total Effort (person/months)
Responsible of WP4	12

Personal Data			
Surname	Name	Organization and Position	Date of birth
Mesini	Daniela	ARS - Associazione per la Ricerca Sociale- Senior Researcher	20th May 1970
Education and training			
<p>Quantitative and qualitative methods on evaluation research, Progetto Valutazione di Torino, 2000-2001</p> <p>Master in Non Profit Organizations Economy, Università degli Studi di Trento, 1997</p> <p>Degree in Economics, Università Cattolica del Sacro Cuore di Milano, 1995.</p>			
Research and Professional experience			
<p>Economist, expert in evaluation methods and practice in the field of health and social policies. In the past fifteen years I have coordinated several projects at different institutional level on social exclusion, the elderly, long term care</p> <p>Director of research in the Social Inclusion Policies Division at ARS</p> <p>Editor of the web site www.qualificare.info , national newsletter on long term care</p> <p>Editor of the scientific journal "Prospettive Sociali e Sanitarie"</p> <p>Deputy Director of the new national "Observatory on Italian social policies" promoted by ARS: www.welforum.it</p>			
Scientific Publications and Congresses or other Oral Communications			
<ul style="list-style-type: none"> ➤ (C. Crepaldi, D. Mesini et al), Families in the economic crisis: changes in policy measures in the EU, Eurofound 2015 published on http://www.eurofound.europa.eu/publications/report/2016/social-policies/families-in-the-economic-crisis-changes-in-policy-measures-in-the-eu ➤ (D. Mesini e G. Rusmini), Emersione e qualificazione del lavoro privato di cura (Emergence and Qualification in the Private Care Sector), in Pasquinelli S. (a cura di), "Nuovi strumenti di sostegno alle famiglie. Assegni di cura e voucher sociali", Carocci Faber, Roma, 2007. ➤ D. Mesini, La spesa per l'assistenza continuativa in Italia (Expenditures for Continuative Care in Italy), in C. Gori (a cura di), "La riforma dell'assistenza ai non autosufficienti. Ipotesi e proposte", Il Mulino, Bologna, 2006. ➤ D. Mesini, Qualificare il lavoro privato di cura in Lombardia (Qualifying Private Care Employment in Lombardy), in Prospettive Sociali e Sanitarie, n. 14, 2006 			
Grants			

In the last 3 years: Grants from Regione Lombardia, Regione Toscana, Fondazione Cariplo, Fondazione Carispezia, Compagnia di San Paolo, and others.

Role in the project	
<i>Role</i>	<i>Total Effort (person/months)</i>
<i>Responsible of WP 1</i>	<i>9 months</i>

Personal Data			
<i>Surname</i>	<i>Name</i>	<i>Organization and Position</i>	<i>Date of birth</i>
<i>De Ambrogio</i>	<i>Ugo</i>	<i>ARS - Associazione per la Ricerca Sociale</i>	<i>17 April 1961</i>
Education and training			
<p>Degree in Political Science, University of Milan, 1986. TSTA (Teaching and Supervising Transactional Analyst). Transactional analyst didactic and supervisor in the organisational field (Degree obtained in San Francisco, 2014).</p>			
Research and Professional experience			
<p><i>Professor of Social Services at Università Bicocca, Milan, since 2014.</i> <i>Past President of Istituto per la Ricerca Sociale, Milano.</i> <i>Collaborator of ARS - Associazione per la Ricerca Sociale</i> <i>Works as researcher and expert trainer. Directs research, consultancy and training activities in the field of social policies, in particular about project processes, evaluation analysis, social and health services, volunteering, youth policies, elderly policies, social professionalities.</i> <i>Editor of the scientific journal "Prospettive Sociali e Sanitarie"</i></p>			
Scientific Publications and Congresses or other Oral Communications			
<ul style="list-style-type: none"> • <i>Valutare gli interventi e le politiche sociali</i> (a cura di), Carocci Faber, Roma 2003. • <i>La Lombardia prova a cambiare strada sui piani di zona</i> (con V. Ghetti e K. Avanzini); in "Prospettive Sociali e Sanitarie" n. 2, 2012. • <i>La programmazione sociale nelle grandi città</i> (con S. Pasquinelli) in "Prospettive Sociali e Sanitarie" n. 9, 2012. • <i>Crisi e innovazione nel lavoro degli operatori</i>, in "Prospettive Sociali e Sanitarie" n. 1, 2016. • With C. Guidetti, <i>La coprogettazione. La partnership tra pubblico e terzo settore</i>, Roma, Carocci, 2016. 			
Grants			
<i>In the last 3 years: Grants from Regione Lombardia, Regione Toscana, Fondazione Cariplo, Fondazione Carispezia, Compagnia di San Paolo, and others.</i>			
Role in the project			
<i>Role</i>	<i>Total Effort (person/months)</i>		
<i>Senior researcher in WP 1 and WP 2</i>	<i>2 months</i>		

Personnel to be recruited and consultants

All 6 young researchers planned to be involved (see the section "Young researchers") will be recruited for this project. In the selection we will highly consider the specific tasks required for the WP in which each of them is planned to be involved and the specific operation they will demonstrate to be able and willing to undertake.

Furthermore, prof. Elenka Brenna, having a strong experience and commitment in ageing studies, will be recruited for 1 year by the University of Pavia.

All personnel to be recruited will have to demonstrate ability to work in team, to interact in the working environment, to verify step by step the progress of their own work and of the evidence collected.

Bibliography

- Abel, E. K. (1986), *Adult daughters and care for the elderly*, "Feminist Studies", 12(3), 479-497.
- Barbabella, F., Di Rosa, M., Melchiorre, M. G., & Lamura, G. (2015), *The employment of migrant workers in Italy's elder care: opportunities and challenges*. In Ute K. Torres S. (ed), *Ageing in Contexts of Migration*, Routledge, London, pp. 159-171.
- Bass, D. M., Noelker, L. S., & Rechlin, L. R. (1996), *The moderating influence of service use on negative caregiving consequences*, in "Journal of Gerontology", 51(3), S121-S131.
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