

1984

# An exploratory study of noninstitutionalized black urban elderly living in age-homogenous apartments in Detroit, Michigan and their informal social support systems

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AN EXPLORATORY STUDY OF NONINSTITUTIONALIZED BLACK URBAN  
ELDERLY LIVING IN AGE-HOMOGENOUS APARTMENTS IN DETROIT,  
MICHIGAN AND THEIR INFORMAL SOCIAL SUPPORT SYSTEMS

*Iowa State University*

Ph.D. 1984

**University  
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An exploratory study of noninstitutionalized black urban elderly  
living in age-homogenous apartments in Detroit, Michigan  
and their informal social support systems

by

Beverly Yvonne Claxton Peoples

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## TABLE OF CONTENTS

	Page
I. INTRODUCTION	1
A. Significance of the Study	7
B. Statement of the Problem	9
C. Purpose of the Study	9
D. Generalizations of the Study	11
E. Organization of the Study	12
F. Summary	13
II. REVIEW OF LITERATURE	14
A. Introduction	14
B. Informal Social Support Systems and Primary Groups	16
1. Concept of primary groups	17
C. The Modified Extended Family	22
D. The Black Family	25
1. Black family and the elderly	29
E. Parents and Their Adult Children	30
1. Residential proximity	31
2. Interaction frequency	33
3. Filial responsibility	36
4. Types of aid adult children provide	40
F. Widowed and Childless Persons	43
G. Support from Distant Relatives	44
H. Support from Non-Kin	45
1. Friends	45
2. Neighbors	48

	Page
I. Age-Homogenous Housing for the Elderly	50
J. Summary	54
III. ANALYTICAL FRAMEWORK	56
A. Theoretical Orientations	56
1. Litwak and Szelenyi	56
2. Sherman	57
3. Cantor	57
4. Overview	58
B. Hypotheses To Be Tested	58
C. Basic Assumptions	63
D. Definitions of Terms	63
E. Limitations of the Study	66
F. Summary	67
IV. METHODOLOGY	69
A. Introduction	69
B. Instrumentation	70
C. Selection of the Sample	72
D. Selection and Training of the Interviewers	73
E. Interview Procedure	74
F. Methods of Analysis	76
V. RESEARCH FINDINGS AND ANALYSIS	79
A. Characteristics of the Sample	79
B. Testing of Hypothesis 1	83
1. Hypothesis 1	83



	Page
C. Testing of Hypothesis 2	87
1. Hypothesis 2	87
D. Testing of Hypothesis 3	93
1. Hypothesis 3	93
E. Testing of Hypothesis 4	97
1. Hypothesis 4	97
F. Testing of Hypothesis 5	99
1. Hypothesis 5	99
G. Testing of Hypothesis 6	103
1. Hypothesis 6	103
H. Testing of Hypothesis 7	107
1. Hypothesis 7	107
I. Testing of Hypothesis 8	108
1. Hypothesis 8	108
VI. DISCUSSION	114
A. Description of Selected Demographic Characteristics of the Sample	114
B. The Availability of Social Relationships Among Sample Members	115
1. Availability and interaction with children	115
2. Availability and interaction with relatives other than children	116
3. Availability and interaction with neighbors	117
4. Availability and interaction with friends	118
C. Hypothesis I	118
D. Hypothesis II	121

	Page
E. Hypothesis III	123
F. Hypothesis IV	124
G. Hypothesis V	125
H. Hypothesis VI	126
I. Hypothesis VII	128
J. Hypothesis VIII	128
K. Summary	130
VII. SUMMARY/CONCLUSIONS AND RECOMMENDATIONS FOR FUTURE STUDY	131
A. Summary/Conclusions	131
B. Recommendations for Future Research	138
VIII. BIBLIOGRAPHY	141
IX. ACKNOWLEDGMENTS	157
X. APPENDIX A. A STUDY OF BLACK SENIOR CITIZENS AND THEIR SOCIAL RELATIONSHIPS	159
XI. APPENDIX B. VERIFICATION OF PERMISSION TO CONDUCT THE INTERVIEWS	174
XII. APPENDIX C. A LETTER REQUESTING PERMISSION TO INTERVIEW INDIVIDUAL TENANTS	176
XIII. APPENDIX D. CONFIDENTIALITY PLEDGE AND CONTRACT	180
XIV. APPENDIX E. INTERVIEWER TRAINING MANUAL	182
XV. APPENDIX F. LETTER OF INTRODUCTION	201
XVI. APPENDIX G. TABLES	203

## LIST OF TABLES

	Page
Table 1. Selected characteristics of respondents	80
Table 2. Reasons respondents moved to the senior citizen's apartments	81
Table 3. Educational level by sex of the respondent	81
Table 4. Respondents' age by marital status	82
Table 5. Sex of the respondent by attained educational level	82
Table 6. Primary groups that help the respondents clean their apartment by sex of respondent	84
Table 7. Primary groups that help respondents clean their apartments by marital status of the respondent	85
Table 8. Primary group assuming responsibility for the respondents while in the hospital by the marital status of the respondent	87
Table 9. Primary groups that accompany the elderly when cashing checks by respondent's marital status	89
Table 10. Primary groups that assist the respondents when sick by respondent's marital status	90
Table 11. Primary groups that talk to the nurses when respondents are in the hospital by respondents' marital status	92
Table 12. Primary groups whom the respondents turn to when they run short of money by respondents' sex	95
Table 13. Primary groups whom the respondents turn to when they run short of money by respondents' marital status	95
Table 14. Primary groups whom the respondents borrow nonmonetary items from by the marital status of the respondent	97
Table 15. Primary groups whom the respondents turn to when they have a sudden or continuing pain by sex of the respondent	98

	Page
Table 16. Pearson correlation matrix	102
Table 17. Primary groups that accompany the respondents to church by marital status	104
Table 18. Primary groups that accompany the respondent to social events by sex of the respondent	104
Table 19. Primary groups that accompany the respondent to social club events by the respondents' marital status	105
Table 20. Primary groups that share free-time activities with the respondent by sex of the respondent	106
Table 21. Primary groups that share free-time activities with the respondent by the respondent's marital status	106
Table 22. Respondents' opinion about where physically dependent senior citizens should live by educational status of the respondent	109
Table 23. Respondents' opinion about where physically independent senior citizens should live by respondents' educational status	110
Table 24. Respondent's choice of neighbors by respondent's educational status	111
Table G1. Primary group assuming responsibility for the respondents while in the hospital by sex of respondent	203
Table G2. Primary groups that accompany the elderly when cashing checks by respondents' sex	203
Table G3. Primary groups that assist the respondents when they are sick in bed by respondents' sex	204
Table G4. Primary groups that talk to the nurses when the respondents are in the hospital by respondents' sex	204
Table G5. Primary groups that the respondent talks to when they are upset by respondent's sex	205
Table G6. Primary groups that the respondents talk to when upset by respondent's marital status	205

	Page
Table G7. Primary groups that assist the respondents fix malfunctioning small items present in their apartment by respondent's sex	206
Table G8. Primary groups that assist the respondents fix malfunctioning small items present in their apartment by respondent's marital status	206
Table G9. Primary groups that assist the respondents store articles by respondent's sex	207
Table G10. Primary groups that assist the respondent store articles by respondent's marital status	207
Table G11. Primary groups that respondents borrow nonmonetary items from by sex of respondent	208
Table G12. Importance of keeping in touch with family by respondent's sex	208
Table G13. Primary groups that accompany the respondents to church by respondent's sex	209
Table G14. Respondent's opinions about the importance of filial responsibility during the illness of their parents by the educational status of the respondent	209
Table G15. Respondents' opinions on adult children giving their parents financial help by respondents' educational status	210
Table G16. Respondents' opinion about sons' and daughters' provision of help to their parents by respondents' educational status	210
Table G17. Frequency of interaction with specific primary groups	211

## I. INTRODUCTION

A common image of elderly people in American society is that they are lonely, isolated, roleless individuals, abandoned by family members, friends, and neighbors. "The idea that the family alone should be primarily responsible for the health and welfare of older persons is a vestigial attitude from an earlier historical period" (Streib, 1972, p. 5). It has been conclusively demonstrated that the concept of abandonment of elderly persons by family, friends and neighbors is a myth (Babchuck, 1978; Litwak, 1960b; Shanas et al., 1968; Sussman, 1965; Weeks and Cuellar, 1981). However, much of what is currently known about social interaction or about old age comes from studies performed on white, middle-class populations. Hirsch (1980) completed a research study that focused on the support that primary groups provide to elderly. Black-white differences were noticed but not reported because the number of responses was too small to support the differences. None of the research cited described the degree of isolation and the interactional needs of noninstitutionalized black elderly living in public, age-homogenous residential settings in the inner city.

A number of studies have confirmed the helping function of the informal social support system in the lives of the elderly (Litwak, 1960b, 1981; Shanas et al., 1968; Wentowski, 1979). Every individual is perceived as having a network of primary groups (relatives, friends, neighbors) that help individuals meet specific needs. Each primary group provides unique support to the individual. The primary groups form an

individual's informal social system and function to meet needs specific to that individual's existence or survival (Litwak, 1981). Some of the help and identified functions that informal support systems provide are those of socialization, companionship, the accomplishment of the tasks of daily living (cooking, feeding, housecleaning, etc.), financial assistance or advice and personal assistance during illness, crises, or emergencies (Anderson, 1977; Litwak, 1981; Stoller and Earl, 1983; Wentowski, 1979). While the existence and importance of informal social support systems is well-documented, knowledge about the cultural dimensions (religion, cultural beliefs, position of the elderly in society, etc.) of the exchanges of support is scarce.

Social interaction is a basic need for all persons, regardless of age group. This is especially important for independent, noninstitutionalized elderly persons interested in maintaining this status (Wentowski, 1979). Retirement and widowhood promote alienation from meaningful family and work roles due to the drop in income and work roles (Wentowski, 1979). Both retirement and widowhood sever social ties, lessen support systems and undercut stability in one's life. Therefore, the development of an informal social support system and the active utilization of the social system's members or primary groups is important for older people. As one progresses towards old age and retirement, the established primary groups an individual once turned to for help in order to maintain independence and a sense of balance may change. Some of the social relationships developed in earlier years remain as an active segment in the older person's informal social support system, and others are replaced by new

members. The informal social support system including the kin network provides instrumental, functional support to the elderly. Only research by Snow and Gordon (1980) contradicts the prevailing view of the importance of a kin network or informal social support network. This study criticized the degree of support that informal social support systems provide.

The availability of a sizeable number of persons in frequent contact with an individual will not necessarily prove beneficial if the nature of these interactions is negative and themselves stressful. In fact, it may be the case that the existence of a single confidant is more important in a variety of ways than being a part of a larger network of superficial friendships (Snow and Gordon, 1980, p. 465).

After retirement or after the children leave home, the elderly person may choose to move to an age-dense or age-homogenous apartment. This type of residential facility fosters or promotes friendship and help patterns among the elderly (Rosow, 1967). "The residential setting of older persons may foster primary group ties, both familial and nonfamilial" (Streib and Beck, 1980). This is significant for both the social and psychological well-being of the individual. Public housing for the elderly was designed to provide poor elderly with safe, conveniently located residential units at rents they can afford and also offer persons opportunities for increased contact with age peers (Warnes, 1982). Age-homogenous residential units are located at varying degrees of proximity from relatives, previous neighbors, friends and other members of the individual's informal social support system. How efficiently does an elderly person's informal social support system adjust to the new environment? More specifically, who do noninstitutionalized black elderly living in



age-homogenous settings turn to for support, aid or help concerning companionship, socialization, tasks of daily living, emergencies, finances or crises?

Shanas and Streib (1965) indicated that the majority of old people live less than a one hour's drive from one of their relatives. The geographic distance between older people and their families has been caused by the geographic mobility of families for reasons such as employment, living conditions and the economy. Shanas (1973) pointed out that when one is determining the closeness of relationships, socio-emotional distance is more important than geographic distance. Yet, geographic distance does limit face-to-face interaction between old people and their families, but it does not limit phoning, writing, or the giving and receiving of financial aid (Heisel, 1973).

Litwak (1981) and Hirsch (1980) examined informal social support systems and the types of help or assistance that primary groups such as spouses, adult children, distant relatives, neighbors and friends provide to old people. Litwak (1981) studied 1,746 white persons aged 65 and older living in two geographical locations including the New York Metropolitan area and two counties in Florida. The sample consisted of 400 persons living in institutionalized settings and 1,346 persons living in the community stratified by economic level and age homogeneity of the neighborhood. Litwak investigated the types of instrumental support that primary groups can best provide support in those services which match them in structure. It was found that the modified extended family could best provide support in those services requiring long-term commitment and no

continuous proximity. (See definition of terms, p. 63). It was found that the marital dyad or a paid helper could best provide support or handle tasks that required long-term commitment and continuous proximity. (See definition of terms.) Neighbors were close in proximity and were found to provide instrumental support in need areas requiring speed of response and spontaneous reaction to a heterogenous array of needs. The findings indicated that friends provided support where the definition of peer group standards is important to the individual in a particular problem situation. Examples of this were: referral to a physician or clinic, companionship during religious and fun-time activities. Litwak (1981) pointed out that spouses, kin, friends and neighbors each provide different types of support that are not compensatory. They can only substitute for each other when the help they provide overlaps along and/or where the groups alter their structure.

Hirsch (1980) studied the households of 1,203 black and white low income households that had noninstitutionalized residents aged 65 years or older. The instrumental support received by elderly working class and ethnic group residents of urban neighborhoods from their families, friends and neighbors was investigated. Hirsch found that there is variation in the choice of preferred helpers according to:

1. Duration of the period of assistance, the nature of assistance, and the degree of dependency of the elderly that was implied in test items
2. Knowledge of formal resource
3. Household composition and
4. The existence of children (Hirsch, 1980, p. 161).

It was also found that for those persons living alone, with friends or others that nonkin helpers were used at least as frequently as were kin

on issues requiring long-term support. The use of non-kin as helpers was found to increase significantly as children became further removed from the older person. Childless elderly were found to utilize nonkin helpers to a greater degree than they utilized family members as helpers. Hirsch only looked at those persons with a physical decline in instrumental activities (mobility or the ability to accomplish the task of daily living). Within this, there were some black/white differences, but the number of blacks was too small and could not support these differences. Hirsch postulated that the majority of the blacks had migrated to the North from the South where there were very poor living conditions. These people learned how to survive at this poverty level and could revert back to some of these strategies during old age when their income was near the poverty line. Yet, this was not characteristic of the white people in the sample. Hirsch found that when the white elderly reached old age with its sudden decline in income, they were unable to effectively handle certain situations because of their lack of experience. Hirsch also recognized that the blacks in the study had a stronger social network pattern due to a more extended family network. Concerning short-term care issues, it was found that kin remained involved in helping the elderly even when adult children did not reside in the same neighborhood as the older parent. Hirsch did not test for black/white differences because the sample size was too small.

As stated earlier in this paper, much of what is currently known about social interaction, informal social support systems and primary groups came from white, often middle-class populations. None of the

research cited the interactional needs of older blacks living in an urban environment. The purpose of this study is to fill this gap of missing information by examining the informal social support systems of black elderly.

#### A. Significance of the Study

Elderly persons go from being a totally independent person to being partially independent and mutually interdependent based upon the support given to them by their family, friends and neighbors. During the aging process, developmental transitions occur that affect one's informal social support system and often cause the breakdown of a functioning, viable system. Some of the detrimental stresses that weaken one's informal social support system include the loss of roles related to work and family, loss of friends due to death, illness or relocation after retirement. If elderly persons are made more aware of these potential threats to their informal social support system as a result of aging, then necessary action can be taken by both federal, state and local organizations to reinforce the viable system with new contributing primary groups.

A review of the literature concerning the black elderly and family relations revealed the existence of significant gaps in this area of investigation (Jackson, 1967; Seelbach, 1976; Streib and Beck, 1980). "Additional information is needed on the social composition, life styles, support systems, special needs and resources of the ethnic elderly in general" (Holzberg, 1982, p. 250). More information concerning black elderly and primary groups within their informal social support system is

needed. Findings from this study could also be beneficial to those persons interested in community education programs for the elderly. Investigations concerning these issues will help professionals in gerontology understand the major roles and functions that kin, friends and neighbors play in providing support to aged black Americans. With this information, programs can be developed or revised by the federal, state and local gerontological offices that will complement the support provided for black elderly by informal social support systems. Since the age-homogenous residential units were designed to meet the needs (housing, socialization, security, psychological, physical, etc.) of independent elderly persons, then the management staff of the apartment buildings must be informed if the needs of the elderly have changed or are not being met (Rosow, 1967). If the elderly are to maintain a maximally feasible level of independence and a satisfactory social adjustment, then a functional informal social support system must be available (Beattie, 1976). Furthermore, over the past 30 years services for the elderly have been shifting away from institutional-based services to emphasis upon community-based services which undergird or support the informal social support system (Beattie, 1976). Therefore, managers of age-homogenous apartments that offer community-based services should become aware of the services that the elderly's informal social support system provides. This will help to avoid duplication of services.

### B. Statement of the Problem

A review of the literature revealed that several studies had examined primary groups that noninstitutionalized elderly persons identified as being significant components in their informal social support system. None of these studies investigated the informal social support systems of the independent black elderly population residing in age homogenous apartments located in an urban setting. Heisel (1973), Hirsch (1980), and Litwak (1981) found that the following primary groups are instrumental components in elderly persons' informal social support system: spouse, adult children, siblings, close friends and neighbors. The types of help that these primary groups provide black elderly with were investigated. A study conducted by Heisel (1973) investigated the level of social interaction and isolation in a randomly selected sample of 156 aged blacks living in an urban area of New Jersey. The interaction patterns were analyzed in terms of availability, relations with and reactions towards close and distant relatives, and friends. The findings of the study indicated that older black men and women rely on friends and neighbors for companionship and relatives for emergency situations. The implications of these findings are important to this study because it reveals that primary groups included in one's informal social support system provide different types of instrumental support.

### C. Purpose of the Study

The purpose of the study was to identify primary groups that non-institutionalized black elderly persons dwelling in federally subsidized

age-homogenous residential units situated in Detroit, Michigan, perceived as being instrumental components in their informal social support system. Hirsch (1980) and Litwak and Szelenyi (1969) identified the specific services that primary groups provide. Those identified services will be examined. More specifically, the purposes of the study were:

- (1) To determine which primary groups provide help to black elderly in situations concerning long-term commitments requiring continuous proximity (daily cooking and housekeeping, daily money management, taking care of when ill, and managing bills).
- (2) To determine which primary groups provide help to black elderly in situations involving long-term commitments that don't require continuous proximity (provision of emotional support over the phone, checks on daily, talk with the medical staff about care while in the hospital, or fly in and take care of a sick person for a two- or three-week period).
- (3) To determine which primary group the black elderly turn to for help during an emergency (sudden pain or injury, sudden sickness). [This is important for the social and psychological well-being of the individual.]
- (4) To determine which primary groups provide help to black elderly in situations involving short-term commitments (borrowing items in a hurry, help store items in the apartment, fixing small household items).
- (5) To explore black elderly's perceived expectations concerning filial responsibility.

- (6) To determine the frequency of interaction that black elderly have with specific primary groups (talk with, see, write).
- (7) To identify the specific primary groups that participate in various free-time activities with the black elderly (religious activities, fun time activities within or outside of the residential setting).
- (8) To explore the black elderly's housing preferences for elderly who are physically independent.

#### D. Generalizations of the Study

The generalizations of the study are based on previous research findings relevant for this study. They are:

- (1) Relatives, friends, spouse, adult children and neighbors are perceived by the contemporary black elderly as being relevant sources of interaction and exchange (Anderson, 1977; Heisel, 1973).
- (2) Community-based services underwrite or support the responsibility of community agencies including the family for the care of the elderly (Beattie, 1976).
- (3) As persons age, attitudinal changes may be required, moving them from the predominant normative theme of independence to a belief system that views mutual, interpersonal dependencies as normal processes for the aging in coping with day-to-day tasks such as those requiring social, economic and physical requirements (Beattie, 1976; Hirsch, 1980).
- (4) Neighbors are seen as providing relevant, instrumental support in situations that require help in reference to speed of response and



- spontaneous reaction to a heterogenous array of needs (Litwak, 1981).
- (5) Family and other blood relatives handle tasks which require long-term commitments and no continuous proximity (Litwak, 1981).
  - (6) Primary groups can optimally handle those tasks which match them in structure (Litwak, 1981).

#### E. Organization of the Study

This study is composed of seven chapters, a bibliography, and appendices. Chapter I presents an overview of the study consisting of the definition of terms, the introduction, statement of the problem, significance of the study, purpose of the study, basic assumptions, generalizations of the study, and limitations of the study.

Chapter II presents a review of the pertinent related literature. It is divided into several sections. Section one presents information on the informal social support systems and primary groups. Section two examines literature on the modified extended family. Section three examines literature on the black family as it relates to the elderly. Section four reviews literature on parents and their adult children in reference to residential proximity, interaction frequency and filial responsibility. Section five reviews the literature on widowed and childless persons and their informal social support systems. Section six examines literature on types of support that distant relatives contribute to one's informal social support system. Section seven reviews literature concerning support from nonkin. More specifically, it examines literature on types of support friends and neighbors provide. Section eight examines literature on age-homogenous housing for the elderly.

Chapter III presents the conceptual framework for the research design.

Chapter IV provides detailed information on the methods and procedures utilized in the study.

Chapter V presents the findings in both tabular and narrative form.

Chapter VI contains a discussion of the findings in relation to the hypotheses presented in Chapter I.

Chapter VII contains a summary of the problem, conclusions, interpretations and recommendations.

#### F. Summary

The purpose of the study was to examine and identify the functions and needs met by the informal social support system of noninstitutionalized black elderly living in age-homogenous residential settings located in Detroit, Michigan. The informal social support system of black elderly is perceived to be composed of primary groups such as: relatives, spouse, adult children, friends, neighbors and significant others. More specifically, the study focused on the help that primary groups provide when assisting noninstitutionalized black elderly remain as independent contributing members in the residential community.

## II. REVIEW OF LITERATURE

### A. Introduction

Research conducted on the elderly is particularly timely in 1984 since more Americans are living beyond the age of 65. In 1982, there were 26.6 million elderly people in the United States; therefore, every ninth American is age 65 or over and makes up 11 percent of the population (Brotman, 1982). In 1980, 90% of the population aged 65 and older were white: 23 million persons. In contrast, blacks constituted only 8%, 2.1 million persons, while the remaining 2% were classified as Spanish origin or other origin (U.S. Bureau of the Census, 1981). By the year 2000, the elderly will number approximately 29 million or 11% of the total population (Cicirelli, 1981). Therefore, as more citizens live to advanced ages, society is turning towards provision of their wants and needs. Who do the elderly turn to in order to assist them meet their needs? Lebowitz (1978) pointed out that

a fundamental gap in knowledge concerns the manner in which support systems are activated in order to provide assistance to an elderly person. We do not have the basic understanding of the decision process whereby an elder person reaches out for help or in which family members or friends offer support (p. 113).

Parsons (1942) argued that, because of the industrial revolution and the technological advances of society, most old people are isolated, alone and without support. Assertions such as this sparked the interest of research investigators and studies concerning the isolation of elderly people began. It is true that old people prefer to live alone, but it does not necessarily mean they are isolated (Litwak, 1981). As a matter of fact,

most studies indicate that elderly people prefer to live alone but near their family (Litwak and Szelenyi, 1969; Neugargen, 1975b). An examination of documented studies presented a picture of old age that is not as bleak or as dysfunctional as some persons assert (Adams, 1968; Streib, 1972; Sussman, 1965). Results of these studies indicate that elderly people are integrated into a functional informal social support system. Within this system, frequent interaction and mutual exchange takes place with primary groups such as the family, friends and neighbors. The well-being and autonomy of the elderly are highly dependent upon the presence or absence of a functional informal social support system. The various relationships or primary groups available in this system directly benefit the physical and mental health of old people (Wentowski, 1979). In general, whether primary involvement is with family, friends, neighbors or significant others, the use of an informal social support system is a ubiquitous occurrence.

The existence and importance of the informal social support system is a well-documented fact; although, knowledge about the cultural dimensions of the exchanges of support is relatively sparse (Jackson, 1967; Seelbach, 1978; Streib and Beck, 1980). A review of the related literature revealed that relatively few studies about informal social support systems of ethnic aged have been conducted, including studies of the black elderly. Several researchers have investigated the informal social support systems of elderly whites (Hirsch, 1980; Litwak, 1981; Litwak and Szelenyi, 1969; Lopata, 1975; Siegel, 1982; Wentowski, 1979). There is no clear evidence to indicate that the results of these

findings are generalizable to black elderly populations. The purpose of this chapter is to review selected literature on the informal social support systems of elderly people. The review covers the research on informal social support systems, family, parents and their adult children, age-homogenous settings, aid from distant kin and aid from nonkin. The studies reviewed and identified the various primary groups and the types of support or help these groups provide to the elderly. Thus, the related findings from these studies provided the conceptual basis for this research investigation.

#### B. Informal Social Support Systems and Primary Groups

It has been the policy of the federal government to provide several basic services for elderly people in such crucial areas as income maintenance, health and transportation. Yet, the informal social support system still retains considerable importance in meeting the more idiosyncratic human needs of individuals. The formal support system should not be expected to provide the intimate communication, love and caring that the primary groups such as family, friends or other members of one's informal social support network gives. The informal social support system may complement the formal support system (Litwak, 1981).

The transition from middle to old age is marked by a change in social relationships. Important role changes occur in the family, with friends, neighbors and with other primary group members included in the individual's informal social support system. Retirement, widowhood,

and the residential proximity of adult children promote alienation from meaningful persons due to the decline in one's income and the loss of various roles including the work role. Both sever social ties, decrease membership in one's informal social support system and undercut stability in the individual's life (Anderson, 1977). Health, income, death of friends, family and neighbors also make interaction difficult.

How do these situations affect the informal social support systems of elderly people? Stephens et al. (1978) studied the informal social support systems of elderly people living in Texas and noted that

much of the deterioration and dependency that is commonly viewed as an inevitable accompaniment of aging can be forestalled and prevented if incentives and means are created to develop and sustain the integration of aging people in informal social networks of support (p. 45).

Holzberg (1982) reviewed the literature on ethnicity and aging and suggested

it is with the help of the psychological and social supports available through ethnicity and these other cultural systems that individuals can find warm and dependable networks to ease their role transitions and accommodate their service needs (p. 255).

According to Holzberg, ethnicity appears to be an important variable in the informal networking of social groups.

### 1. Concept of primary groups

Litwak and Szelenyi (1969) began the historical investigations concerned with the concept of primary groups and the type of support they provide to informal social support systems of elderly persons. They pointed out that individuals need a variety of persons included in their informal social support system because people rely on family, friends

and other primary group members for different services. The concept of primary group is defined as those persons such as spouse, adult children, distant relatives, friends, neighbors, and other significant persons who provide help or support which is instrumental in assisting individuals remain independent, contributing members in society. Implicit in the concept is the notion that primary groups, under the pressure of differential geographic and occupational mobility of members, differentiate structurally (Litwak and Szelenyi, 1969). For example, neighbors often become friends and contribute support that was once provided by friends. Another example is that adult children might move out of town and distant relatives assume the responsibility of providing support that adult children used to provide. Kinship ties, neighbors and friends are the three types of primary groups identified by Litwak and Szelenyi. The kinship structure can be further divided into smaller primary groups including the parents, adult children, siblings and distant relatives.

The kinship structure includes those people who are related in semi-permanent biological or legal ways (Litwak and Szelenyi, 1969). The most distinctive feature of this structure is permanent group membership. Litwak and Szelenyi posit a distinct instrumental function for kin group members in need areas characterized by duration of support. An assumption made in the kin help patterns is that reciprocal obligations are involved in this structure. For example, parents provide their young children with food and shelter and in return, when parents retire, they expect a certain amount of support from their adult children.

Cohler (1983) studied the interdependence of families and stated, "the extent of contact which exists among family members in contemporary urban society: frequent contact and acknowledgment of reciprocal obligations and responsibilities appear to be the norm" (Cohler, 1983, p. 31). Therefore, the kinship structure can best handle tasks that require long-term commitments, with or without continuous proximity. In reference to the kinship structure, Dono et al. (1979) stated: "permanence may be indicated by actual long-term commitments stemming from the past (e.g., the parent-child tie when the child is 50) or by the expectation of a long-term commitment into the future (e.g., parent-child tie at the birth of the child)" (p. 405). Another feature of the kinship structure is the minimal amount of free choice involved in who one's kin will be or how long the relationship will last (Dono et al., 1979; Litwak and Szelenyi, 1969). "Since the kin group is diverse in terms of generation, sex, and sometimes class, relatives are not very helpful in dealing with tasks requiring matched interests" (Dono et al., 1979, p. 406). Included in the kinship structure is the marital dyad whose distinctive characteristics are proximity with neighbors, long-term commitment with kin and frequently age-homogeneity, similarity of interests and values with friends (Dono et al., 1979).

The distinctive characteristic about neighbors is their geographic proximity. Neighbors who do not share long-term familiarity provide instrumental support in need areas requiring speed of response and spontaneous reaction to a heterogenous array of needs (Hirsch, 1980). Neighbors are in the best situation to provide time urgent services. But



more specifically, "for short-term time emergencies the relatives and neighbors play the same role while for long-term emergencies, the family is much more likely to be chosen as the source of aid" (Litwak and Szelenyi, 1969, p. 475).

Friends provide important support where the definition of peer group standards is important to the individual in a particular problem situation (Dono et al., 1979; Heisel, 1973; Litwak and Szelenyi, 1969). The distinctive feature of friendship is individual choice and affectivity (Dono et al., 1979; Heisel, 1973; Litwak and Szelenyi, 1969). In friendship, there is a high degree of matching on status characteristics such as age, life status, role, sex and socioeconomic status (Riley and Forner, 1968; Rosow, 1967). Friends are usually age peers and are important sources of support and knowledge for unique generational or life-stage problems.

Physical disabilities and mortality are key features of old age that affect primary groups based on age peers. Therefore, it is critical for physically frail elderly people to have primary groups that cross generational lines involved in their informal social support system. This is usually the kin group and the cross-generational character is associated with long-term commitment (Dono et al., 1979). Furthermore,

it might be conjectured that substantial aid from primary groups to older persons will only be provided by a group to which the older person contributed during his more productive years and from which members can expect to draw help if needed in the future. The cross generational kin group meets these conditions (Dono et al., 1979, p. 414).

Litwak (1981) indicated that each primary group has a unique structure and can best handle tasks that match it in structure. They only

substitute for each other when tasks happen to overlap among common dimensions or where the groups alter their structure (Litwak, 1981). Arling (1976a) studied the primary groups utilized by old people and contended that "relationships with family and with friends and neighbors involve separate realms of activity which complement each other, but which cannot ordinarily be substituted for each other" (p. 759). An alternate theory questions the assumptions that Litwak has made about primary groups performing those tasks that match it in structure. Cantor (1979) studied low-income persons and identified four alternative models by which different elements of the informal social support system are activated. First, in the additive model, each primary group performs randomly-chosen tasks; therefore, different primary groups are functionally equivalent. In the second model, the type of primary group to which people turn to for aid is based on an order of preference known as the hierarchical-compensatory model. In the theoretical model, the asymmetrical model, it is predicted that one primary group will supply all the aid and if the primary group is not available, the tasks are not performed. The fourth model, the task specific model, suggested that the individual prefers that a given group always supply help regardless of the task. If the preferred group is unable to perform the task, then the individual turns to other primary groups. Cantor's models all assume that primary groups do not vary structurally, that variations do not matter for task performance, and that tasks performed by primary group members do not vary.

Adams (1968) studied the kinship structure of the American family and contends that family and friends are approaching the same

structure and as a consequence are becoming interchangeable.

Lebowitz et al. (1973) studied a wealthy sample and found that individuals in need of assistance chose persons from formal organizations over primary group members in their informal social support system. These concepts refute Litwak and Szelenyi's (1969) assumptions but most empirical studies are consistent with the theory which asserts differentially structured primary groups perform unique tasks. "Contradictory findings occur when the researchers restrict themselves to choices rather than effective aid or, alternatively, when there are measurement problems" (Dono et al., 1979).

### C. The Modified Extended Family

Sociological literature in the early 1960s indicated that industrialization and urbanization resulted in a type of family which is "automatic", particularistic, loose-knit, unstable and dissolved. Shanas et al. (1968) investigated the relevant literature pertaining to the social interaction patterns of old people and noted the myth of alienation was a popular perception during this time period. Shanas et al. disagreed with the popular myth and investigated the social interaction patterns of old, whites living in three industrial societies and found that intimacy at a distance exists between generations, not isolation. Elderly people in the United States are not isolated from family, nor alienated from their peers or close friends. This fact has been amply documented in an array of research studies (Arling, 1976b; Dono et al., 1979; Hirsch, 1980; Litwak and Szelenyi, 1969; Shanas, 1980; Shanas and Streib, 1965; Streib and Beck, 1980; Troll, 1971). Sussman (1965)

studied old people and their families and contended that old people are integrated into an extended family network of social relationships and mutual assistance that operates along bilateral kin lines and vertically over several generations. Sussman further argued that the extended family/kin network is the basic support system in American urban society within which parent-adult child relationships are identified, described and analyzed.

Litwak (1965) indicated that in order for kin to remain viable, they must learn to communicate and exchange services in ways other than face-to-face contact such as in letter writing and phone calls. A kinship group maintains cohesion through a particular kind of kinship structure known as the modified extended family. Litwak defined this as a coalition of nuclear families in a state of partial dependence in which family members exchange significant services with each other while remaining autonomous. Litwak (1981) studied the informal social support systems of elderly white people living in New York and Florida and found that the modified extended family and its various primary groups is still an important concept. This type of family/kinship structure does not demand geographical propinquity, occupational involvement, or nepotism, nor does it have a hierarchical authority structure (Kerckhoff, 1965). The family maintains cohesion without geographic proximity by using modern means of communication (phone, telegram, letters) and transportation.

Lopata (1973) examined the contributions of extended families to the informal social support systems of widows living in Chicago. It was found that adult children offered relatively little help. When help

was offered, it was in the form of economic service, social or emotional support. This study exemplified the limitations of the modified extended family system. Gibson (1972) cast doubt on the usefulness of Litwak's concept of the "modified extended family structure" and questioned its lack of operational precision and unclear definition. This prompted Gibson to study 486 disability applicants and their extended family system. The single, divorced and widowed were found to be more integrated into their extended family system than the married, for whom kin were of relatively low importance. Therefore, it was concluded that for nuclear families, the household is the basic family system and for the nonmarried, it is the extended kin network. Gibson's findings indicate that a relatively high degree of isolation exists for the contemporary nuclear family. Lipman (1979) stated that the demographic profile of the family has changed in size and composition. He indicated that the strength and intensity of family support for the elderly may be in jeopardy. Lipman studied elderly people living in a retirement village and found that the size of one's informal support system is not indicative of the supportive quality of their relationships. These findings were important to this study because they exemplified the limitations experienced by specific primary group members in attempting to meet the needs of elderly persons. The research data also explained that the quality of one's informal social support system is not affected by its size.

The preceding studies refute Litwak's concept of the modified extended family structure. But there are research findings that indicate that there is a modified extended kin structure in the American society

and included in this are the older members of the family. Troll (1971) completed a ten-year review of the families of later life, and Streib and Beck (1980) reviewed this topic again, documenting studies that support the existence and viability of the modified extended family. These reviews identified the primary groups of parents, adult children, siblings and distant relatives as being vibrant components of the modified extended family system. The family is not static and has the capability of expanding to include distant relatives as a need arises for information, services or help from these relatives (Shanas, 1980). Family members are the primary informal resources for both instrumental service and socioemotional support. People of all ages are embedded in an extensive kinship system rather than isolated in the family of procreation (Rosow, 1967). A major element of the extended family structure is the economic interdependency of family members. It fosters a sense of family togetherness and some economic security (Martin and Martin, 1978). Shanas (1980) studied the family relations of old people and concluded that the modified extended family is the most dominant reliable family for providing support to elderly people in the United States. This type of family assists the elderly maintain their independent status and autonomy.

#### D. The Black Family

The majority of the literature on the black family was written in the late sixties and early seventies. During this historical time period, the plight of the black family was of national interest. Some

of the distinctive characteristics of the black extended family were described by Martin and Martin (1978):

. . . it is a multigenerational, interdependent kinship system which is welded together by a sense of family obligation to relatives; is organized around a "family base" household; extends across geographical boundaries to connect family units to an extended family network; and has a built-in mutual aid system for the welfare of its members and the maintenance of the family as a whole (p. 1).

This definition is in agreement with Litwak and Szelenyi's (1969) definition of the modified extended family. This type of family structure has an extensive help system as one of its assets. An assumption made in kin helping patterns is that reciprocal obligations are involved in this system. The social networks or helping systems provide emotional support, economic supplements and protect the family's integrity from assault by external forces (McAdoo, 1978). Hill (1971) implied that among blacks, the extended family was a source of strength and a protection against isolation in the larger society. Billingsley (1968) indicated that black families band together and form a network of intimate mutual aid and social interaction with family, neighbors and friends as a coping strategy.

Stack (1974) implied that individual involvement in the kin helping system or the extended family structure might be jeopardized or decreased because of the mobility of middle-class black families. Stack concluded that not much is known about middle-class black families because most of the studies have been conducted on poor black families. Allen (1978) stated

. . . it is distressing to note, therefore, the limited progress of researchers in their efforts to elaborate the system of dynamics intervening between class determined context and family behaviors. We need to develop models which systematically explicate in a step-by-step fashion in the interaction of socioeconomic status, family structure, and individual member behavior (p. 181).

McAdoo (1978) completed a study that refuted Stack's (1974) assumption about the mobility of middle-income blacks and their interaction with the modified extended family. McAdoo's study revealed that mobile black families remain actively involved in the help exchange patterns in the extended family system. Therefore, family members with goals of mobility do not have to disassociate themselves from the family. Married, black adult children located in geographic proximity of parents continue to provide them with financial and emotional support. "The extended family pattern continues to be a viable cultural component for the emotional well-being of blacks at all economic levels, even when middle-class status has been maintained over several generations" (McAdoo, 1978, p. 775). McAdoo's study indicated that middle-income black families do not avoid reciprocal obligations to their extended kin-help systems in order to realize their own mobility goals. Billingsley (1968) and Stack (1974) pointed out that the extended family pattern is not only a coping strategy, but has evolved into a strong and valuable cultural pattern.

Cultural factors evolved from the ethnic backgrounds of the differences in the extended kin relationships between black, white, Indian, Asian-American and various other ethnic groups (Hays and Mindel, 1973; Holzberg, 1982; Stack, 1974). Arling and Blehar (1979) reported that the



black experience strengthened the informal social support systems of black people "because of such conditions as racism and poverty, they have developed stronger mutual support systems than the white elderly, who may be less in need of help or who may have inculcated the predominant cultural values of independence to such a degree that their capacity to tolerate dependence on others is decreased" (Arling and Blehar, 1979, p. 199). For example, Hill (1971) stated that the stability and survival of black families is due to five cultural strengths. They are: strong kinship bonds, strong work orientation, adaptability of family tasks, strong achievement orientation, and strong religious orientation. Family strengths are defined as being "those traits which facilitate the ability of the family to meet the needs of its members and the demands made upon it by the systems outside the family unit. They are necessary for the survival and maintenance of family networks" (Hill, 1971, p. 3). An exploratory study conducted by Hays and Mindel (1973) on the kin interaction of 25 black and white families found that blacks interacted more often with extended kin and received more help from them than that evidenced by white families. Even when variables such as socioeconomic status, geographical mobility, marital status and family size were controlled, racial differences were found. The sample was small and not randomly selected, so generalizations to the total population are questionable. Other studies also refer to the racial differences in kin interaction (Anderson, 1977; Arling and Blehar, 1979; Holzberg, 1982; Jackson, 1976; Martin and Martin, 1978). Researchers have documented the relevance of ethnicity in shaping family relationships,

attitudes toward elderly relatives and the role of the elderly in the family (Arling and Blehar, 1979; Cantor, 1979; Wochrer, 1978). Significant influences upon the process of aging are culture, history, collective identity, sense of peoplehood, unique heritage, tradition, values and attitudes (Holzberg, 1982). Within the existing literature, there are gaps that need to be filled that are concerned with the cultural factors such as support systems and family networks. Fulfillment of these gaps is of significance to the elderly because planners, policy makers and practitioners must become sensitive to the differential cultural styles and needs of the populations they serve (Holzberg, 1982). "It is with the help of the psychological and social supports available through ethnicity and these other cultural systems that individuals can find warm and dependable networks to ease their role transitions and accommodate their service needs" (Holzberg, 1982, p. 255).

#### 1. Black family and the elderly

Although research about the elderly has proliferated along with the growing concern about the plight of elderly persons in our society, the majority of researched information has been collected on predominantly white populations. A review of the literature revealed that a number of research studies on blacks have been conducted, but only a limited number of studies have described the black elderly and the conditions and the specific problems they encounter during the process of aging (Jackson, 1967; Seelbach, 1976, 1978; Streib and Beck, 1980). Streib and Beck (1980) stated, "the literature on the older family is somewhat limited. For example, in the 16 articles that appeared in the

Special Issue on the Black Family in the Journal of Marriage and the Family (Volume 40, No. 4, 1978), none focused upon the older Black family" (Streib and Beck, 1980, p. 948). Studies have been conducted on the social interaction patterns of black elderly (Hays and Mindel, 1973; Heisel, 1973; Martin and Martin, 1978; McNeely and Colen, 1983; Wolf et al., 1983). Studies have also investigated black elderly and their formal and informal social support systems (Anderson, 1977; Babchuck, 1978; Cantor, 1975; Hirsch, 1980; Jackson, 1971; Lopata, 1975, 1978; Martin and Martin, 1978; Martineau, 1977; Shanas, 1973; Stephens et al., 1978; Wentowski, 1979). Researchers have explored the black elderly and their morale (Arling, 1976a; Creecy and Wright, 1979; McNeely and Colen, 1983). Still others have been interested in the filial responsibility and the black elderly (Arling and Blehar, 1979; Jackson, 1971, 1972a, 1976; Seelbach, 1976, 1978). Black elderly and housing have been studied (Bourg, 1975; Carp, 1967; Herbert, 1983; Welfeld and Struyk, 1979). More recently in the late seventies and early eighties, ethnicity and aging have been explored (Cantor, 1979; Holzberg, 1982; Huling, 1978; McNeely and Colen, 1983; Register, 1981; Tate, 1983, Wochrer, 1978). These have been the most investigated areas on blacks and the aging process, but only a limited number studied elderly living in age-homogenous apartments.

#### E. Parents and Their Adult Children

Data indicate that four of every five noninstitutionalized elderly persons have living adult children (Shanas, 1980). Children are often described as one's old age insurance. But because of the changing

demographics, particularly longer average life expectancy and smaller families, "young-old" adult children (those age 55-75) are caring for two or three "old-old" parents (those over age 75). Consequently, this situation has the potential of producing stress for both the adult children and parents. Despite the growth of the number of services provided by formal organizations for elderly people, the expansion has not kept pace with the growing number of older persons who could potentially avail themselves of the services (Olsen and Cahn, 1980). Yet, many elderly people complain that community-based services are too impersonal and inappropriate. Therefore, this causes them to avoid the utilization of the services provided by the organizations (Olsen and Cahn, 1980). Instead, they rely upon the primary groups in their informal social support system to assist them. The primary group most often utilized are adult children (Shanas, 1973; Troll et al., 1979b).

The format of this discussion and topical heading were adopted from Troll et al. (1979b). This section of the literature review is divided into four units and research findings related to each unit are discussed.

#### 1. Residential proximity

Research studies done on residential proximity are mainly concerned with how near parents and their adult children live to each other. Almost all surveys on residential proximity show that elderly prefer to live in their own homes but near their children (Neugarten, 1975b; Troll et al., 1979b). In surveys done by Litwak (1981) and Sussman (1965), old people indicated the need to maintain physical distance from their children without being isolated from them. Mutual assistance is prevalent between young

families and their elderly parents, but they both strive to maintain "intimacy at a distance" (Neugarten, 1975a; Shanas, 1979a). Shanas et al. (1968), in a study of old people in three industrial societies, found that 84% of people aged 60 or older lived less than one hour's drive from their children. Studies also indicate that elderly parents live in close geographic proximity to at least one adult child, maintain close contact with their adult children and receive an array of heterogeneous assistance from them (Litwak, 1981; Rosenburg, 1970; Shanas, 1979b; Sussman, 1965). Bultena and Wood (1969) indicate that after parents retire, they move near their children, whereas Lee (1974) suggested that middle-aged adult children move back to the geographic areas where they grew up.

Researchers have studied the effects of geographic distance on intergenerational ties of families and have found that distance does limit face-to-face contact but does not limit other forms of interaction such as phoning, writing or the giving and receiving of financial aid (Hirsch, 1980; Litwak, 1981; Lopata, 1975; Ward, 1978; Wilkening et al., 1972). Airplanes, trains, modern highway systems and the telephone are useful in linking parents and adult children while promoting independent functioning of each familiar unit (Litwak, 1981; Sussman, 1965). The functioning of the modified extended family system is not dependent upon geographic proximity of their members (Litwak, 1981). What is important in the family relationships is the socioemotional closeness between kin which makes them turn to one another in case of need (Shanas, 1973).

Cantor (1979) studied elderly people and their relationships

with friends and neighbors. It was found that when adult children or relatives lived near, they were chosen over friends and neighbors by the elderly for support in all areas. When the elderly did not live in close geographic proximity to their children or relatives, support from these primary groups was sought first. But when the elderly were lonely and wanted someone to talk to, neighbors and friends became important sources of support.

## 2. Interaction frequency

Studies investigating interaction frequency and type examine how often parents and adult children phone, visit or write each other (Troll et al., 1979b). Troll et al.'s (1979a,b) literature review implied that most older parents and middle-aged children see each other often, at least once a week, or contact each other by phone, letter writing or extended visits. "Two-thirds or more of all aged parents see their children at least weekly, with frequent telephone contact besides" (Schorr, 1980, p. 3). Most phone calls received by the elderly are from their adult children, indicating that children try to keep in contact with their parents even though they are unable to visit them (Heisel, 1973; Shanas, 1973; Litwak, 1981).

Ever since Parsons (1942) lamented the demise of the extended family, it has been claimed that older people are "alienated" from their adult children. If alienation was meant to connote physical distance, then it is misleading because a number of researchers report frequent parent-child contact is the rule, not the exception (Arling and Blehar, 1979; Heisel, 1973; Hirsch, 1980; Litwak, 1981). Hays and

Mindel (1973) studied the extended kin relationship of black and white families and reported that higher rates of interaction, patterns of help and perceived importance of kin relationships among blacks compared to whites. Riley and Foner (1968) studied the social interactions of elderly people with their family, friends and neighbors. They noticed that elderly interact more with family members than any other primary group member in their informal social support system. Powers and Bultena (1976) found that in rural Iowa, older men interacted more frequently with their children and other kin than did women. It has been evidenced that more than half of the older people interviewed in research studies reported that they saw at least one of their children the week before the interview was conducted (Litwak, 1981; Shanas, 1979a). It is not necessary for old people to have many visitors. The important factor is that they need regular and constant visits by reliable persons (Shanas, 1979a). Cohler stated, ". . . the extent of contact which exists among family members in society: frequent contact, acknowledgment of reciprocal obligations and responsibilities appear to be the norm" (p. 31). O'Brien and Wagner (1980) studied the social interactions of frail, noninstitutionalized elderly living in Portland, Oregon, and reported that those individuals with high rates of social interaction utilized informal support systems more frequently than formal support systems. O'Brien and Wagner (1980) questioned the reliability of the self-reported information concerning the frequency of social interaction reported. They further stated that "only by gathering primary data directly from all its members can the true

characteristics of social networks be analyzed as to validly determine how they help. . ." (p. 83).

Lee (1979) stated, "Documentation of high rates of interaction between adults and their parents does not in itself warrant the conclusion that these relationships are a primary source of emotional support for the elderly" (p. 510). In reference to this, Lee (1979) cast doubt on the assertion that Shanas (1973) made concerning adult children and the kin networks being the ". . . major social and psychological support of the American elderly" (Shanas, 1979b, p. 510). Ward (1978) stated, "While proximity and contact appear relatively high, we know surprisingly little about the quality and meaning of interactions between older people and their families. Existing patterns of interaction do not necessarily imply emotional closeness or warmth and contacts may be ritualistic" (p. 268). Gibson (1972) reviewed the literature on the kin family network and concluded that "much of the literature on interaction between related households is confused in its conceptualization, inaccurate in its operationalization and unrepresentative in its sampling" (p. 14). Gibson further contended that on occasions there has been a lack of conceptual distinction between frequency of contact and functionality as dimensions of kin relations as well as a tendency to use one as an indicator of the other.

a. Parent-child interaction and the morale of elderly parents

Despite the frequency of contact with family members, especially children, the impact of family relationships and interaction upon the morale of the elderly is questionable. Lee (1979) examined the frequency of



interaction with adult offspring on the morale of elderly parents. They found that the frequency of interaction with adult children is uncorrelated with the morale of the elderly. Arling (1976a) studied the ways in which family, friends and neighbors influence the morale of elderly widows. Arling demonstrated that neither the availability of children nor the frequency of contact with them elevated the morale of elderly parents. Researchers have postulated that there is no significant difference in personal morale between those elderly who see their children frequently and those who do not see them frequently (Blau, 1973; Rosenberg, 1970). Arling and Blehar (1979) suggested two reasons for the negative relationship between family contact and morale. First, elderly people and their adult children have contrasting interests, values and mores. These existing generational differences did not make good companions. A second difficulty arises out of the role reversal that occurs between parents and adult children.

### 3. Filial responsibility

Survey data indicate that 40% of people between the ages of 55 and 59 have at least one living parent, as do 20% of those 60 to 64 and 10% of those 65 to 69 (National Retired Teachers Association, 1981). Demographic changes have reduced the number of descendants to whom an older person may turn for assistance. The change in the woman's social roles, especially the rise in work outside the home, has fostered obligations which compete with duties toward aging parents. Also, some of the aged in need of physical, financial, and emotional

assistance are very old and have offspring who are the "young-old" (see definition of terms). Therefore, their offspring are also faced with declining energy, health and finances and find that providing instrumental support to their parents is a burden (Treas, 1977). Acts of filial responsibility are done on a voluntary basis without law and compulsion (Schorr, 1980; Sussman, 1965). This section of the literature review is concerned with filial expectation expressed by the elderly and levels of filial responsibility that adult children will provide. Identification of the types of aid adult children provide their parents with is covered in the section immediately following the discussion of filial responsibility.

Brody et al. (1983) stated that "findings relating to the complex concept of filial responsibility are difficult to synthesize because of their divergent approaches. Some look at levels of expectations of filial behavior. . . others at the types of filial responsibility. Moreover, it is not clear how types or levels of expectations about filial responsibility have changed over time" (p. 598). Several studies examined the elderly's filial expectations. Seelbach (1978) investigated elderly parents' filial expectation and compared black and white parents in respect to filial responsibilities. Seelbach found:

- (1) As one becomes older, one tends to expect more from offspring in the way of filial support.
- (2) Lower income elderly have higher extended expectations of their adult children, while higher income elderly expect less from their adult children.

- (3) Females reported high levels of filial support.
- (4) No significant differences were found when blacks and whites were compared in terms of filial responsibility expectations and realizations.

Seelbach concluded by suggesting that "social class may be a more useful variable than race in explaining and understanding differences in family functioning" (p. 347). Kuly and Tobin (1980) explored the personal relationship between older people and those they designate as responsible for them in the event of a crisis. It was found that the nature of obligation and reciprocity in the kinship network is clear to the elderly. "Spouses are selected before children, children before siblings and siblings before other extended family members" (Kuly and Tobin, 1980, p. 142). Elderly first turn to their family for support or help, but if they are not available, they will opt for support from friends, neighbors, and lastly formal organizations (Cantor, 1977). Seelbach and Sauer (1977) studied filial responsibility expectations in relation to the level of morale of elderly parents. Morale was significantly associated with the type of filial responsibility expectation for black elderly only. Parents who expressed high filial expectations were the ones more apt to exhibit low morale. Those with low expectancies had high morale. Sussman (1965) implied that when parents give financial and emotional aid to their children, that this is a way of insuring that a reciprocal act from the adult child will occur. Parents help children during their first few years of marriage and in return adult children provide retired parents with a

heterogenous array of support (Sussman, 1965).

Studies have also examined the perception of the level of filial support adult children should provide. Brody et al. (1983) explored the effects of women's changing role on attitudes toward filial responsibility for the care of elderly adults. Information from three generations was examined, and findings were:

- (1) "All three generations endorsed statements that elderly parents should be able to depend on their grown children for various kinds of help" (p. 605).
- (2) Middle-aged and young-adults had strong feelings about filial responsibility.
- (3) Sixty-one percent of the middle-generation worked but expressed strong attitudes about filial responsibility.

These findings suggest that most women who work will continue to be filially responsible. The oldest generation was most receptive and the youngest generation was less receptive of formal support service organizations for the elderly. Wake and Sporakowski (1972) examined perceptions of college students and their parents concerning the level of filial responsibility. Students showed greater willingness for supporting aged parents than their parents. In another study conducted by Wake and Sporakowski (1972) on the intergenerational attitudes towards supporting parents, it was found that women were less willing than men to support aged parents. Yet, when they controlled for generation, the sex difference disappeared. Adams (1967, 1968) compared kinship and friendship ties and postulated that relations between kin are dominated by intimacy and feelings of

obligation. Blau (1973) implied that the obligatory nature of the parent-adult child relationship detracts from the quality of the relationship. Schorr (1980) reported that when parents and adult children were asked to name a variety of possible sources of income for the retired elderly, they both have similar views. Most of them stated that social security and pension plans should provide income support for the elderly. A number of the respondents indicated that elderly should provide for themselves and a few persons suggested that adult children should give support.

#### 4. Types of aid adult children provide

Sussman (1976) stated:

The family network, while structured by blood and marriage ties, is essentially a "voluntary" system with few legal or cultural constraints to participate in it. The ties of members are based largely on reciprocal exchanges of various kinds of aid, usually of unequal value and on some adherence to filial responsibility (p. 237).

In solving problems, the elderly usually first draw help or aid from family, friends and neighbors and then if these resources are unavailable, one turns to formal services for support. Sources of aid from adult children and family are discussed in this section of the paper. Sources of aid that neighbors and friends provide are included in the unit following this discussion.

Economic support, service support, emotional support, and support during illness or emergencies are the major types of aid delivered to noninstitutionalized elderly parents by their adult children and family. Economic support identified in research studies are: gifts of cash,

food, clothing, rent or mortgage payments (Cantor, 1979; Gibson, 1972; Rosow, 1967; Shanas, 1973, 1979b; Streib and Beck, 1980; Sussman, 1976). Blekner (1965) indicated that economic aid among the middle class is in the form of cash and among the lower class help to the elderly is often shared living arrangements. Research studies identified housecleaning, cooking, transportation, legal aid, help in making decisions, care during illness, minor household repairs, and shopping as the service support aid provided to elderly parents (Cantor, 1975, 1979; Robinson and Thunher, 1979; Shanas, 1979b; Shanas et al., 1968; Streib and Beck, 1980; Stoller and Earl, 1983; Sussman, 1965, 1976; Wentowski, 1979). Research studies on emotional support were on relational sentiments or whom the elderly persons turn to when feeling upset or depressed (Cantor, 1975, 1979; Robinson and Thunher, 1979; Shanas, 1979b; Streib and Beck, 1980; Troll et al., 1979b, 1971; Wentowski, 1979). Shorter (1975) described the lessening importance of economic transfers within families and suggested that emotional ties have replaced economic interdependency. Social support includes going with people to public places such as movies, visiting, entertaining, going to church, engaging in sports, cards or other games or engaging in other social activities (Cantor, 1975; Shanas, 1979a; Sussman, 1965). Only a few studies indicate that adult children provide this type of support because most report that age-peers fulfill this area of support. Support during health and housing emergencies is also provided by adult children (Shanas et al., 1968; Streib and Beck, 1980; Stoller and Earl, 1983; Sussman, 1965, 1976; Troll, 1971; Wentowski, 1979). Women usually

provide the majority of the five types of services discussed (Shanas and Streib, 1965; Streib and Beck, 1980; Troll et al., 1979b).

Litwak and Szelenyi (1969) reported that family and adult children provide a distinct instrumental function for elderly parents and kin. They purport that family, friends and neighbors are primary groups with different structures and can best handle tasks which require long-term commitments and no continuous proximity. This includes flying in for a two-week period to take care of a sick parent or providing emotional support over the telephone or mailing money to parents. Shanas (1979b) conceptualized a "principle of substitution" which implied that family members are available in serial order, meaning that if one individual is not available, then another will step in. This principle can be contrasted to the "principle of shared functioning kinship system" advocated by Litwak (1981), where specific needs of the elderly are matched to the most appropriate primary group as determined by long-term commitment, proximity and degree of intimacy.

Litwak (1965) expressed the idea of shared functions among formal organizations and families. The assertion was made that family and bureaucratic organizations are not to be considered in competition with each other. Nor is it to be assumed that the family has failed when the older members utilize formal organizations for assistance in meeting some of their needs.

#### F. Widowed and Childless Persons

The older population has experienced not only growth, but also changes in composition. An older relative is more likely to be a woman, widowed and very old (Treas, 1977). When the older person is widowed--and almost nine million older people are widowed--the women in the next generation are the principal caregivers (Brody et al., 1983). The family is the first line of resource or assistance that widowed, black elderly turn to (Jackson, 1976). Adult children are the first ones they turn to and most often they respond (Arling and Blehar, 1979; Jackson, 1976). Lopata (1973) studied widows living in Chicago and concluded that widows' sons provided financial assistance and advice while their daughters provided household and emotional help. Arling (1976b) studied widows and found that friends were more important in relation to morale than family. Those relationships with kin are based on role reversal and dependency, but friendship is based on reciprocity, mutuality of interests and values (Arling, 1976b). Those factors contribute to the findings of morale in relation to family and friends. Lopata (1978) studied the contributions of the modified extended family to the support of widows. Lopata stated, "The main conclusion that the hypotheses predicting an active modified extended family network functioning in American metropolitan centers, with exchanges of support from separate households, is not supported for any relatives other than children" (p. 362). Kin members not directly in the parent-child line are not important contributors to the support systems of widows (Lopata, 1978).

When elderly persons are childless, they turn to other relatives for



support. Shanas (1973) indicated that people without children utilize their siblings as important social and psychological supports. Johnson and Catalano (1981) studied elderly persons recently discharged from the hospital. They found that the childless subgroups had few resources from which to draw. Those who were married but childless had even fewer relatives available than the childless unmarrieds. The married childless group was the most socially isolated. The husband/wife dyad was found to be the most viable source of support. The childless unmarrieds were more involved with kin. Johnson and Catalano (1981) also demonstrated that friends were a viable source of support in meeting the needs of the childless elderly but do not provide instrumental support during illness. Jackson (1972c) studied elderly married blacks and reported that in the absence of children, they direct their needs toward other relatives, and those relatives respond. Stephens et al. (1978) studied the informal social support systems of elderly living in Texas. They suggested that the childless subgroup showed greater levels of social support than those with living children. "It appears that the fewer family members one has to call upon, the more one needs to develop alternative sources of support" (p. 43).

#### G. Support from Distant Relatives

There were only a few articles discussed in the literature that described the support that distant relatives provided. Old people who have never been married maintained much closer relationships with their siblings than those who marry and have children. Persons without children resume closer associations with siblings upon the death of a spouse, but

not as close as single persons (Troll, 1971). Shanas (1979a) investigated the principle of substitution which states that when old people are childless, a principle of family substitution operates. In this case, brothers, sisters, nephews, and nieces fulfill the roles and assume the obligations of adult children. Atchley et al. (1975) found that contact with extended kin depends upon social class, at least for women. In their sample never-married older women teachers interacted with extended kin more than those who were married. But among older telephone workers, those who never married had much lower levels of interaction with extended kin as compared to those who were married. Johnson and Catalano (1981) found that for unmarried childless distant relatives rarely performed the intimate aspects of personal care such as hygiene, housekeeping and meal preparation. Instead, distant relatives arranged for hired help, offered legal advice and occasionally offered transportation. Distant relatives expressed ambivalence about assuming the role of care given because of the impositions it placed on their own lives.

Wolf et al. (1983) surveyed black elderly people and investigated their contacts with family and friends. They found no evidence that black elderly increase contacts with relatives and friends in the absence of contacts with children. Also, frequent contact with relatives other than children was the same for the married, divorced, or separated.

#### H. Support from Non-Kin

##### 1. Friends

Several researchers have explored the types of support that friends provide to elderly people, the affect friendship has on morale and the

characteristics of friendship in old age. Family ties usually remain constant throughout old age because kinship roles are prescribed while friendships are developed on a voluntary basis and characterized by an equal ability to exchange assistance (Arling, 1976a). Jackson (1972b) studied the friend relationships among older black women and reported that the three most frequent activities with friends are visiting, religious attendance, other group attendance and shopping. Age peers provide help without undue conflict and strain. According to Jackson, there were similarities in the instrumental and affective relationships with oldest children and with closest friends. Sussman (1965) implied that friends provide emotional support to the elderly and therefore do not have to depend on family members for this type of aid. But with role losses and a lowered income experienced by the elderly, frequent interaction with friends is interrupted. When this occurs, the elderly person turns to their family for emotional support (Sussman, 1965).

Litwak and Szelenyi (1969) defined friendship ties as the weakest of all ties, indicating that they do not have the permanence of the kinship link or the face-to-face contact characteristic of neighbors. "Friendship ties tend to rest on free choice and affectivity" (Litwak and Szelenyi, 1969, p. 469). Friends are presented as offering support where the definition of peer group standards is important to the individual in a particular problem situation. For example, newly retired persons may seek support and assistance in understanding the loss of the work role by talking with other retired persons. Friendship groups are important to have during old age because at this time, friends may be experiencing

similar changes in roles and can assist each other ". . . in the learning of new and altered roles and in the relinquishment of old ones" (Hess, 1972, p. 382). Cohen and Rajkowski (1982) argued that friendship has nothing to do with such qualities as free choice, belief systems or affectivity that Litwak and Szelenyi identified as the universal essence of friendship. In their study of elderly persons living in hotel rooms, it was revealed that proximity and visual contact are not necessary for the maintenance of friendship. Yet, Hess (1979) contended that female friends provide intimacy and affectivity, whereas male friends are involved more in goal-directed activities. Cohen and Rajkowski's (1982) study did not support this dichotomy. Hess (1972) and Rosow (1967) indicated that age homophily was an important factor in friendship formation but in Cohen and Rajkowski's (1982) study, age was not an important discriminant variable.

a. Friendship and morale Research studies on the effects of friendship on the morale of elderly people emphasize that interaction with friends is more predictive of high morale than interactions with family (Arling and Blehar, 1979; Wood and Robertson, 1978). Creecy and Wright (1979) studied the relationship between informal activity with friends and morale among a sample of black and white elderly. Findings indicated that activity with friends had a significant relationship with morale among white elderly but not with black elderly. Arling and Blehar (1979) stated that "geographical restrictions usually occur in old age and can influence the kinds of social relationships that are formed. At a time when friends appear to assume greater importance than ever for

personal morale, barriers may be erected to the maintenance of companionable relationships" (Arling and Blehar, 1979, p. 187). Friendship commonly develops around the work setting but with retirement, the basis for social ties with work associates declines in the absence of day-to-day interaction (Arling, 1976a). For the elderly, neighbors or the immediate residential environment are the best reservoir for friendship (Arling, 1976a).

## 2. Neighbors

According to Litwak and Szelenyi (1969), face-to-face contact and residential proximity are two key structural features of the neighborhood that are related to the unique tasks of neighbors. The special province of neighbors, especially immediate ones, is related to support they can provide during times of emergency. "Proximity permits speed of response" (Dono et al., 1979, p. 407). Neighbors are seen as relevant in providing instrumental support in areas requiring speed of response and spontaneous reaction to a heterogeneous array of needs (Litwak and Szelenyi, 1969). Proximity is also important for support that requires constant observation. This is illustrated when elderly people listen for neighbors' unanswered telephones and doorbells. Sometimes neighbors are reluctant to offer help or accept help from neighbors on a regular basis because of the implied perception of reciprocity. The reluctance occurs because the recipients are anxious to return the favor as soon as possible (Dono et al., 1979).

Hirsch (1980) suggested that "in comparison with the ascriptive network of kin roles, the neighboring role can be seen as more freely defined

by the actors in the dyadic or multi-person relationship in terms of setting acceptable parameters for intimacy and instrumental support" (p. 32). Keller (1968) pointed out that the structure of neighbor relationships is difficult to assess.

Companionship is identified as an instrumental support that is the province of neighbors. Arling and Blehar (1979) studied black and white persons aged 65 and over concerning friendship, neighboring and family life. In reference to neighboring, they concluded that neighbors and friends were the most frequent companions for attending church-related and organizational meetings. The black respondents expected neighbors and friends to give them financial assistance, to visit them at least once a week and to provide them with advice about their personal problems. Anderson (1977) explored the support systems of aged blacks and found that the role of friends and neighbors is to provide companionship for both the married and widowed respondents in the study.

There were few studies that identified the supportive services that neighbors provide. Cantor (1975) studied the support system of elderly people living in an urban environment. Findings indicated that neighbors interact frequently and provide support during emergency or crisis situations. Almost 75% of the sample had a "visiting relationship" with neighbors. Keller (1968) concurred with Cantor's findings but also suggested that the structure of neighbor relationships is difficult to assess. Litwak and Szelenyi (1969) assert that "for short term emergencies, the relatives and neighbors play the same role while for long-term emergencies the family is much more likely to be chosen as

the key source of aid" (p. 475).

### I. Age-Homogenous Housing for the Elderly

Since World War II housing for the elderly has been a major societal and gerontological concern. The demand for living units in which the elderly can maintain their own households is not new. Provision of independent housekeeping units for old people dates back to the Middle Ages when special homes for the elderly interested in independent living were built in England, Holland and Germany. "In 1956, the U.S. Government explicitly sought to improve the housing of poor older Americans by amending the U.S. Housing Act of 1937 so as to make older individuals (i.e., 62 and over) eligible for low-rent public housing" (Mangum, 1982, p. 192). Public housing has been the single largest federally-assisted program for older persons and provides 529,000 dwelling units (U.S. Senate Special Committee on Aging, 1980). About 6% of the population aged 60 and over reside in retirement housing in the United States and 3% of these reside in federally-assisted housing. According to Gozonsky (1966), the real objectives of housing for the elderly go far beyond the provisions of suitable independent housing and living arrangements and are to stimulate fuller, more meaningful life for the residents and to encourage their continuing development as useful contributing members of society. Elderly people prefer to have housing alternatives which enable them to be masters of their own households.

One of the earliest and most extensive studies about retirement apartments was Carp's (1966) study on the first cohort of older persons

to move into Victoria Plaza. This was a rental public housing apartment building for the elderly located in Texas. Carp found that the morale of these persons increased after moving into the new apartments. Lawton and Cohen (1974) compared persons moving into five different high-rise apartment buildings for the elderly with similar persons remaining in old homes. Those living in the apartments had a higher morale than those remaining in their homes. Also, Messer (1967) studied elderly residents of age-segregated and age-integrated housing and reported that people living in the age-segregated housing had higher morale than those living in age-integrated housing.

Montgomery (1972) suggested that practitioners such as social workers, physicians and gerontologists hold the view that age-mixing will increase interaction along the age spectrum. On the other hand, Montgomery stated that social theorists believe segregation of the aged increases interaction. Ward (1978) examined a variety of age-segregated or age-homogenous living environments and contended that this type of environment enhances social interaction by providing age and cohort interaction. Kart and Manard (1981) studied elderly persons in California and explored their interests in age-homogenous housing. According to Kart and Manard, those respondents who expressed interest in age-homogenous public housing had more friends whom they visited than those not expressing an interest in this type of housing. Teaff, Lawton and Carlson's (1973) research findings concur with Kart and Manard's. Their findings revealed that elderly tenants in age-homogenous public housing had higher rates of activity participation



and more family interaction than those in age-integrated projects. Rosow (1967) showed that age-homogenous housing fostered friendship and helping patterns among the elderly. But Hochschild (1973) disagreed and stated that residents of age-homogenous housing considered kinship ties to be stronger than friendship ties. McGahan (1972) indicated that more intense and intimate relationships within a residential housing environment are fostered by perceived homogeneity among residents.

The majority of the related literature indicates that age homogeneity of the neighborhood is beneficial for the elderly and contributes to increasing their life satisfaction and morale. It also creates a high level of social activity by fostering contacts with friends and neighbors (Atchley, 1980; Carp, 1966; Rosow, 1967; Teaff et al., 1978). Age homogeneity increases the concentration of proximate age peers but may create distance from kin who have the most long-term commitment (Siegel, 1982). Sherman (1975a) examined the networks of mutual assistance among elderly residents in private and public age-homogenous apartments located in California. Sherman found that the residents had more mutual assistance with neighbors than relatives. Stoller and Earl (1983) postulated that friends and neighbors living in age-homogenous environments help each other with the nonpersonal tasks of daily living and their help is intermittent and supplementary not compensatory. Furthermore, they assist in strengthening the kin relationships by relieving some of the burden from care-taking kin (Lowenthal and Robinson, 1976). Siegel (1982) studied

elderly people in New York and Florida and the effect of homogeneity upon the support given by the various primary group members. It was discovered that in leisure time activities, participation and watching neighbors' apartments or homes were strongly facilitated by age-homogenous residential environments. Siegel utilized the formulation of Litwak (1981), which specified that groups can only handle those tasks which match it in structure. Siegel demonstrated that where tasks or support required long-term commitments and physical resources such as taking care of chronically ill people or handling older persons' finances, that age homogenous neighborhoods for older people were not as effective as they should be. Ehrlich et al. (1982) studied the residents of an age homogenous apartment complex to determine if their needs had changed over the last 15 years. It was found that 47% of the respondents were not sure whether or not they would ask a neighbor for help if they were ill or for other mutual aid. They concluded that environment alone does not ensure reciprocity among older persons.

A sub-field within gerontology is aging and the environment, which is concerned with the behavioral implications of the environment. It has attracted the attention and interests of a variety of professionals including architects, geographers, psychologists and sociologists. According to Lawton (1980, p. 2):

The basic assertion underlying the study of environment and behavior is that a person's behavioral and psychological state can be better understood with knowledge of the context in which the person behaves.

Lawton identified the following aspects of the environment as those which influence an individual's behavior: the personal, physical, social, group, and the suprapersonal environments (the aggregate of individuals in physical proximity to the subject). Lawton (1980) speculated that the adaptive behavior of an individual is a function of the interaction between the individual's general competence and the degree of environment press one is experiencing. Environmental press was defined as forces in the environment that, together with an individual need, evoke a response. They postulated that it is possible to maximize the adaptive behavior of older people in housing settings by making appropriate adjustments between their levels of competence and degree of press. Very little research in this area has been reported.

#### J. Summary

In reviewing the related literature, it was noticed that a definite gap exists in the knowledge concerning the specific primary group providing the black elderly with support when help or assistance was needed. The literature review identified the most prominent primary groups in the elderly's informal social support system as being family, friends and neighbors. These primary groups contribute instrumental supportive services to the elderly. Support ranges from taking care of an elderly person with a long-term illness to borrowing a cup of sugar or an egg. Research studies exploring the age-integrated and age-homogenous environments were examined. They demonstrated the effect these settings have on the elderly's psychological and social behavior.

The research of the literature exhibited that very limited information is known about black elderly residing in age homogenous apartment buildings.

The review of the related literature on the elderly and informal social support systems revealed that specific variables must be examined in this study. These are: types of support received from family, friends and neighbors; frequency of interaction with family, friends and neighbors; filial expectations and housing preferences identified by the elderly. These variables will be directly related to the hypotheses formulated in Chapter III. Information concerning these variables will be collected during personal interviews with the sample. Therefore, identified variables will be used in the formulation of the analytical framework.

### III. ANALYTICAL FRAMEWORK

#### A. Theoretical Orientations

The review of literature revealed several theoretical orientations in reference to informal social support systems and primary groups.

##### 1. Litwak and Szelenyi

Litwak and Szelenyi (1969) posited distinctive instrumental functions for primary groups in the provision of support to the elderly. This is a structural-functional concept. Each primary group is identified as functionally appropriate to perform specific tasks according to the duration of support-giving required and based upon the unique structural characteristics of each group. They identified three types of primary groups in accordance with their characteristic structure and identified the types of support each group is structurally able to provide to the elderly. For instance, neighbors provide support in need areas that require speed of response and spontaneous reaction to a heterogenous array of needs. The emergencies range from trivial matters such as borrowing a cup of sugar while in the midst of preparing a meal or to catastrophies involving life-threatening medical situations. Family members have a distinguishable feature known as permanence and do best when the support involved requires long-term ties. Friends are presented as offering help or support in need areas where the definition of peer group standards is important to the individual in a particular problem situation. This concept focuses on the structural characteristics of the three primary groups that dictate the type of support each group

can provide to the elderly.

## 2. Sherman

Sherman's (1975a) model suggested that the support provided by kin, friends and neighbors to the elderly is cumulative in nature. Sherman purported that those elderly who had a life pattern of mutual support or exchange with their children extended this pattern to new settings. Those without children share support less with their neighbors than do those elderly who have reared children. The childless elderly maintain relatively independent existences throughout their lifespan. Sherman viewed the childless elderly as supportless and identified child rearing as a requisite keystone experience to mutually supportive interaction with others throughout the life span.

## 3. Cantor

Cantor (1977) argued that a hierarchial-compensatory model of support from primary group members to the elderly exists. In this model, the ordering of the preferred helpers is determined by the primacy of the relationship of the support givers to the elderly, rather than by the nature of the task or its duration as suggested by Litwak and Szelenyi. This model operates on the assumption that the elderly have an ordered preference with family members seen as being most appropriate, followed by the next appropriate helper being significant others, and finally by formal support systems. Cantor's model acknowledged preferences for support by members of different primary groups but in the absence of the preferred source of support, other primary group members are utilized.

Therefore, this model has a compensatory mechanism.

#### 4. Overview

The three models have an area of concurrence in the identification of the significant primary groups present in the elderly's informal social support system. They all identified the important supportive primary groups as being family, friends and neighbors. Yet, there are some differences in their interpretation of the support provided by each. Sherman (1975a) indicated that a cumulative pattern of support exists with the options of aging individuals expanded by the increased range of informal resources. Both Litwak and Cantor predicted that the family plays a predominant role in the providance of support to the elderly. But Cantor (1977) indicated that the family plays a predominant role in the support of the elderly regardless of the task or help required. Litwak and Szelenyi (1969) purported that the family can only handle specific tasks or provide specific types of support to the elderly due to its structure. Litwak ascertains that a structural-functional dimension exists in the type of support that primary groups provide.

#### B. Hypotheses To Be Tested

The theoretical orientations formed the basis for the development of the following hypotheses. These hypotheses were tested to achieve the purposes of this study and were stated as null hypotheses:

- (1) H01 There was no significant difference in the frequency of help provided by a specific primary group member on support concerning

long-term commitment requiring continuous availability or proximity.

H01A. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member on helping the respondents keep track of their bills.

H01B. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member on helping the respondents clean their apartment.

H01C. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member on helping the respondent in the preparation of meals.

H01D. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member while the respondent is hospitalized.

(2) H02 There was no significant difference in the frequency of help provided by a specific primary group member on support concerning long-term commitments without continuous proximity.

H02A. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member in the activity of accompanying them while paying their bills.

H02B. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary



group member when the respondents needed someone to go with them to cash their check.

- H02C. There was no significant difference by sex or marital status in the frequency of sending the respondent money on a regular basis by a specific primary group member.
- H02D. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent was ill at home.
- H02E. There was no significant difference by sex or marital status in the frequency of a specific primary group member talking with the medical personnel during the hospitalization of the respondent.
- H02F. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent was feeling low.
- (3) H03 There was no significant difference in the utilization of a specific primary group member on help concerning short-term commitments.
- H03A. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when a small item in the respondent's apartment is malfunctioning.
- H03B. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent needs to borrow money.

H03C. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent needed items to be stored.

H03D. There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent needed to borrow a non-monetary item.

(4) H04 There was no significant difference in the utilization of a specific primary group member on issues pertaining to help during an emergency or crisis situation on the following variable: sex.

(5) H05 There was no significant difference in the frequency of interaction with specific primary group members.

H05A. There was no significant difference by sex in the importance of interaction between married children and their parents.

H05B. There will be a positive relationship among the activities (phone calls, letters, visits).

(6) H06 There was no significant difference in the primary group member chosen by the elderly to participate in free-time activities at home, entertainment outside the home and religious activities.

H06A. There was no significant difference by sex or marital status in the frequency of the respondents request for a specific primary group member to accompany them to church.

H06B. There was no significant difference by sex or marital status in the frequency of the respondents request for a specific primary group member to accompany them to a social club

event.

H06C. There was no significant difference by sex or marital status in the frequency of the respondents request for a specific primary group member to join them in a free-time activity at home.

H06D. Primary group selection for all three activities is related.

(7) H07 There was no significant difference in the perceived expectations of the black elderly on support concerning residence and financial help provided by adult children.

H07A. There was no significant difference by the educational status of the respondents in their perception about the preferred residence of married children.

H07B. There was no significant difference by the educational status of the respondents in their perception about the care adult children should provide when parents are sick.

H07C. There was no significant difference by the educational status of the respondents in their perception about adult children giving parents financial help.

H07D. There was no significant difference by the educational status of the respondents in their perception about the kinds of help sons and daughters provide.

(8) H08 There was no significant difference in the elderly's preference for housing.

- H08A. Educational status made no significant difference in the respondents' preference for housing in reference to a physically dependent senior citizen.
- H08B. Educational status made no significant difference in the respondents' preference for housing in reference to a physically independent senior citizen.
- H08C. Educational status made no significant difference in the respondents' preference for living near people of a specific age group.

#### C. Basic Assumptions

For the purposes of this study, it was assumed:

- (1) That every individual in a modern society must have a network of primary groups, the reason being that each primary group has different structures and, therefore, can provide different support.
- (2) That the informal social support system is important in meeting the idiosyncratic human needs of individuals.

#### D. Definition of Terms

The following definitions were used for the purpose of this study:

- (1) Age-homogenous apartments - Specially-designed rental projects for the independent elderly aged 62 and over (Weifeld and Streyk, 1979).
- (2) Close friend - Was used in the study to denote someone the respondent could confide in, who was liked very much, and was trusted

with personal property (Bell, 1973). They are best suited to provide help that requires peer group standards (Litwak, 1981).

- (3) Distant relatives - Was used in the study to describe those persons related by blood or marriage not including spouse, adult children or siblings (Bell, 1973).
- (4) Family - Was used in the study to describe that group of individuals to whom they are related by blood or marriage (Shanas, 1979b).
- (5) Filial responsibility - Was used in the study to refer to adults' obligations to meet their parents' basic needs. "The term emphasizes duty rather than satisfaction and is usually connected with protection, care or financial support" (Schorr, 1980, p. 1).
- (6) Formal support system - This was used in the study to ". . . refer to the governmental and voluntary service agencies and the health and other service professionals that stand ready to provide long-term care services to elders living in the community" (Branch and Jette, 1983).
- (7) Informal support system - This was used in the study to define "an elder's spouse, living children, siblings, other relatives, friends, and neighbors--those 'significant others' with whom the elder has close contact" (U.S. Office of Management and Budget, 1980).
- (8) Long-term commitment requiring continuous proximity - This term was used to describe the following types of help: daily cooking, daily housekeeping, shopping, daily money management, dressing, bathing, personal grooming, managing bills, and take care of during a long-term illness (Litwak, 1981). Questions related to these tasks were

included on the interview schedule.

- (9) Long-term commitment not requiring continuous proximity - This term was used to describe the following types of help: provision of emotional support over the phone, check on daily, accompany them to specific activities, talk with medical staff about care while in the hospital, or fly in and take care of a sick person for two or three weeks and send money on a regular basis (Litwak, 1981).
- (10) Old-old - Those elderly people over 75 years of age (Neugarten and Hagestad, 1976).
- (11) Modified extended family - This term was used to describe a family consisting of a coalition of nuclear families in a state of partial dependence in which family members exchange significant services with each other, yet remain autonomous. "They can best handle tasks which require long-term commitments and no continuous proximity" (Litwak, 1981, p. 6).
- (12) Neighbor - This definition was used to describe someone living in the immediate vicinity of the respondents' apartment (Bell, 1973).
- (13) Primary groups - This term was used to define spouse, adult children, distant relatives, friends, neighbors and other significant persons that provide help or support which is instrumental in assisting elderly individuals remain as an independent contributing member in society. They each have different structures and handle different types of tasks effectively (Litwak and Szelenyi, 1969).
- (14) Short-term commitment - This term was used in the study to define those tasks in which speed of response is important such as

borrowing things in a hurry and fixing small household items (Litwak, 1981).

- (15) Support system - This term was used to define "all those persons who are primary relations of the individual and all secondary relations to whom the respondent regularly turns for help in maintaining himself or herself within a community context" (Longino and Lipman, 1981, p. 170). It is a set of relations involving the giving and receiving of objects, services, social and emotional supports defined by the giver and receiver as necessary in maintaining a style of life (Lopata, 1975).
- (16) Young-old - Those elderly persons between the ages 55 and 75 (Neugarten and Hagestad, 1976).

#### E. Limitations of the Study

The data collected reflected the responses of black elderly living in federally-subsidized age homogenous apartments. The geographic location was within an urban environment in Detroit, Michigan. It is not assumed that their responses are representative of the attitudes of black elderly living in other urban environments. Therefore, the results of study cannot be generalized to the entire population of black elderly living in age-homogenous settings, but can be generalized to the black elderly population living in these five apartment buildings.

Experimenter effect occurs when an experimental treatment's effectiveness is affected by the particular experimenter who administered it. Such factors as age, sex, physical attractiveness, tone of voice, and many other attributes of each individual interviewer could have effected

the respondents' answers. These attributes contribute to the effectiveness or ineffectiveness of the treatment. Since the researcher trained and utilized several interviewers, the problem with experimenter effect may exist.

Interaction of the time of measurement and treatments effects indicate that administration of the interview at different points in time might result in different findings. The interview was conducted during the month of February, and the data collected then might not reflect what the findings would be if data were collected at another point in time.

There also is the possibility that the results represent a cohort effect that is specific to that cohort. Therefore, the results of the study are not generalizable to other cohorts.

These limitations might restrict the generalization, but at the same time the study does provide insight into a relatively under-researched category of the aged.

Another limitation is that the interview is based on self-report information, and the accuracy of the individual's perception of the examined situations is questionable.

#### F. Summary

This chapter presented the current theoretical orientations concerning informal support systems and primary groups. These theoretical orientations formed the basis for the development of the hypotheses to be tested in this study. Specific basic assumptions of the study were



identified. The terms to be utilized in this study were defined, and the limitations of the study were identified.

#### IV. METHODOLOGY

##### A. Introduction

In the review of literature, the studies cited described various forms of support, help or tasks that the primary group (adult-child, spouse, distant relatives, friends, and neighbors) provide to noninstitutionalized elderly persons. Litwak and Szelenyi (1969) and Litwak (1981) presented a framework for classifying the support that primary groups provide to elderly people. This study was not intended to replicate Litwak's research. But Litwak's studies were reviewed because they provided a useful orientation for the purpose of this study. Litwak (1981) indicated that different types of primary groups are able to provide support in heterogenous need areas. He reported that:

- (1) Marital dyad or paid helper: provides support requiring long-term commitment and continuous proximity.
- (2) Modified extended family: provides support requiring long-term commitments and no continuous proximity.
- (3) Neighbors: provide support requiring speed of response to a heterogenous array of needs.
- (4) Friends: provide support where the definition of peer standard is important.

In the present study, the types of primary groups identified in Litwak and Szelenyi's model were utilized. The purpose of the study was to identify primary groups that noninstitutionalized black elderly persons dwelling in federally-subsidized age homogenous residential units

situated in Detroit, Michigan, perceived as being instrumental components in their informal social support system.

### B. Instrumentation

The research methodology for this study incorporated the use of survey research, defined by Borg and Gall (1979, p. 282), ". . . a method of collection information. . . to explore relationships between different variables." Survey research is not concerned with the manipulation of variables. Wiersma (1969, p. 272) ". . . surveys deal with questions about what is rather than why it is so." A sample survey involves selecting a random sample and attempting to make inferences about the population from the sample observations.

The instrument utilized was adapted from one previously used in research studies conducted by Litwak (1981) and Hirsch (1980). Specific content areas were adopted from their interview schedules, but for adaptability and clarity some of the questions were reworded. The interview schedules developed by Litwak and Hirsch contained some questions that were not relevant for this study, and these were omitted. In revising the questions, Dillman's (1978) research on the construction of mail and telephone surveys was utilized as a reference. The step-by-step information provided by this book was closely followed. Dr. Richard Warren, Director of the Research Institute for Studies in Education (RISE) at Iowa State University, Dr. Diane James, a reading specialist at Iowa State University, and Tony Genalo, a statistician in the Statistics Department at Iowa State University, each reviewed and critiqued the

interview schedule several times.

The interview schedule was pilot-tested with black elderly persons in attendance at the Jesse Cosby Senior Citizen Center located in Waterloo, Iowa. The interview schedule contained 47 questions and the face-to-face interview session lasted approximately 50 minutes. Several of the questions and examples utilized in the interview confused the respondents and revisions were made for the purposes of clarity. The interview schedule was reviewed and critiqued again by the persons previously mentioned. It then was reviewed and approved by the Human Subjects Committee at Iowa State University.

The interview schedule (Appendix A) consisted of an:

- (1) Introduction: This section stressed the importance that the individual was contributing valuable information. A brief description of the study was presented. Confidentiality and anonymity were stressed. Verification of permission to interview was provided by the property supervisor (Appendix B).
- (2) Questions: Forty-seven open-ended pre-coded questions concerning financial management, emotional concerns, emergency situations, social interaction activities, demographic characteristics, household management, health and filial responsibility were organized to form the body of the interview schedule. The questions were arranged in a logical sequence. One section of the interview contained five questions that utilized the Likert-type scale. These questions concerned mutual aid and affection.
- (3) Final section of the interview: An offer to mail a summary of the

results was included. A formal thank-you comment was addressed. The interviewer was asked to rate the quality of the interview and indicate the time it began and ended.

### C. Selection of the Sample

The sample was composed of 140 randomly selected low income, noninstitutionalized, black elderly living in federally subsidized age-homogenous apartment buildings located in Detroit, Michigan. A multi-staged sampling procedure was used:

- (1) Permission to conduct the study was sought from the regional manager of the five age-homogenous apartment buildings to be studied.
- (2) The regional manager was mailed a description of the study and a copy of the interview schedule. These were taken before a screening committee that consisted of the five property supervisors and the building managers at the main business office. Approval of the study was granted. The managers of the buildings were notified; they informed the residents that some of them would be getting a letter in January requesting their participation in a research study (Appendix C).
- (3) In order to meet the special requirements of utilizing an all-black sample, the regional supervisor selected those buildings that had the greatest number of black residents. Three buildings were selected. All five buildings required that tenants be at least age 62 or handicapped and have a monthly income. The only difference was that some buildings had more black residents than others.

- (4) A list of all the black residents in the three buildings was provided by the building managers, and the sample was randomly selected from this list. Each person was assigned a number and a table of random numbers was used to select the sample.

#### D. Selection and Training of the Interviewers

Four women aged 23-35 were selected to conduct the interview. The selection criteria required that they be black, high school graduates, women and have the ability to effectively establish rapport with people. They were all high school graduates and two had completed two years of college. One person had previous experience in telephone interviewing. All four had warm and friendly personalities, making it easy for them to establish rapport with the person to be interviewed. Each person was required to sign a contract that explicitly stated what expectations were required of them before being paid and the date that all interviews must be completed (Appendix D).

Training of the interviewers consisted of several steps. First, general interview procedures were discussed. The purpose of the study was reviewed and training manuals (Appendix E) were distributed. Then, the questionnaire was reviewed. Each item was reviewed in detail so that interviewers were familiar with the intent of each question and with the response alternatives. Ways of phrasing probing questions to clarify a response when needed were illustrated. (In general, few probing questions were needed with the structured interview format.) Next, methods of recording responses were illustrated and discussed. Then, interviewers administered the questionnaire to each other until they were adept

in the administration of the items and the recording of the responses. Each role-playing session was critiqued by the trainer, and the participants. At this point, trial interviews were arranged with volunteer subjects, with discussion and critique following each interview. The trial interviews were continued until each interviewer and trainer felt that the interviewer had reached a satisfactory level of competence. Finally, instructions were given in methods of locating prospective interviewees, securing consent for the interview, and reporting interviewing progress.

#### E. Interview Procedure

- (1) Two weeks prior to the interview, a letter was mailed to 240 randomly selected persons (Appendix C). The letter:
  - (a) Included a brief description of the study.
  - (b) Included verification of permission to conduct the study from the building managers (the building managers' names were included in the letter).
  - (c) Included information on confidentiality.
  - (d) Included a choice of time of day: Morning (8 a.m.-12); Afternoon (12 p.m.-5 p.m.); Evenings (5 p.m.-8 p.m.).
  - (e) Included a choice of day: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, or Sunday; February 9th-25th.
  - (f) Included a choice of location of the interview: Respondent's apartment or in an office located in their apartment building (this was cleared through management).

- (g) Included a consent statement. (There was no evidence that those persons who refused to participate were different than those participating in the study.)
  - (h) Included a request for their phone number so that the interview could be scheduled. (Due to the apartment building's security, scheduled appointments were needed.)
  - (i) Included a return envelope with instructions for them to return the letter to the building manager at their earliest convenient time. (Building managers were informed of this.) This technique was utilized as a measure to establish trust with the respondent.
- (2) Interviewers were randomly assigned to the respondents and were instructed to arrange for scheduled interviews with the respondents. Interviewers were given identification badges with the Iowa State University logo printed on them. They were instructed to wear these to the interview. They were also given a letter of introduction that had the major professor's signature (Appendix F). They were to read this to the respondents and let them examine it. This letter was enclosed in a plastic cover for protection. The letter basically stated what the first letter of request included, but in more brief terms. All of these were measures developed to gain the respondents' trust.
- (3) Sixteen respondents (four persons from each interviewer's list) were randomly chosen for a brief ten-minute follow-up interview. Questions were asked to get their reaction to the interview.



Examples of the questions are:

- (a) Did someone from Iowa State University interview you?
- (b) How did you feel about the interview?
- (c) Was it too long or too short?
- (d) Should we ask other questions on other areas? If yes, then ask,  
What other questions should we ask?
- (e) What are your feelings about the person who interviewed you?  
Was she friendly?

These questions were asked to check the reliability of the information. The respondents were informed that a follow-up interview was needed in order to improve the interview process and allay any fears they might have.

#### F. Methods of Analysis

Statistics were chosen that were appropriate for the hypotheses to be tested and for the level of measurement used for the variables. The chi-square ( $\chi^2$ ) nonparametric statistic, and correlations were used throughout this study for analyzing research findings. According to Nie et al. (1975, p. 233), the chi-square test ". . . helps to determine whether a systematic relationship exists between two variables." It is used when the categories into which the frequencies fall are discrete (Borg and Gall, 1979). For the chi-square computations, if the computed value exceeded the critical value found in the  $\chi^2$  table (Ott, 1977, p. 660), the null hypotheses were rejected. If the computed value was less than the table value, the null hypothesis was accepted. The asterisk (\*) was used in the tables to denote significant

differences at the 0.05 level, and the double asterisk (\*\*) was used to denote significant differences at the 0.01 level.

Pearson product moment correlation was used to describe the strength of relationship between two variables (Borg and Gall, 1979).

The interview schedule was precoded before the interview. Those answers that required coding after the interview were completed with the assistance of RISE graduate students. A numerical code was used and the data were keypunched at the Statistical Laboratory at Iowa State University.

In order to develop the major categories for the type of aid to be identified, the following procedures were used:

- (1) A content analysis of the responses to the questions was conducted and major categories were formed from this analysis.
- (2) From the literature, a list of the major primary groups was developed:
  - (a) Spouse
  - (b) Adult-child
  - (c) Friends
  - (d) Neighbors

For the purposes of the statistical tests performed in this study, these categories were collapsed into two categories. The first category included spouse, adult children, and distant relatives and was labeled relatives. The second category included the variables friends and neighbors and was labeled nonrelatives. The distinction between support provided specifically by friends or neighbors cannot be determined since

both of these primary groups formed one category.

The following information concerning the hypotheses and findings is important:

- (a) The majority of the hypotheses were stated in the null form because of the statistical tests chosen for this study. One hypothesis was not written in the null form because information from the literature review implied that black elderly are in frequent interaction with their extended family members, neighbors and friends.
- (b) Each hypothesis was examined in reference to the respondent's sex, marital status and educational status in order to explore if any significant relationship existed between these variables and the primary group member identified as providing support. The review of the literature indicated this has not been done. Therefore, this information would be an extension of the field of gerontology concerned with informal social support systems.
- (c) The percentages reported in the tables presented in the research findings analysis chapter and the discussion chapter are based only on those persons that identified they were: receiving support from primary group members, participating in leisure time activities, expressing opinions on filial responsibilities, and interacting with members of their informal social support system. The reported percentages are not based on the total sample.

## V. RESEARCH FINDINGS AND ANALYSIS

### A. Characteristics of the Sample

The findings of this research study are presented in this chapter. The majority of the 140 respondents in this study were female (64%), widowed (69%), aged 62-72 (47%), born in the South (74%), and have been living in Detroit over ten years (91%). The sample had a mixed educational background with 22% of the respondents having a ninth grade education and 23% having a high school diploma. The number and percentage of respondent characteristics examined in this study are presented in Table 1.

The respondents were asked *why they chose to move to these apartments*. The reason stated most often was that the apartment building was conveniently located near the places they frequented. Table 2 presents the respondents' reasons for moving to the apartment building.

Several cross tabulations were run to further describe the demographic characteristics of the sample. Fifty-one percent of the females ranged between the ages 62-72 as compared to the males, where only forty percent of them were in this category. Table 3 further shows that 48 percent of the males were aged 73-83. Also, most of the males are located in this age group. When age was crossed with marital status, it was found that 52 percent of the married people were age 73-83 and 45 percent of the widowed were in this age category. This can be further discerned in Table 4.

Table 5 presents information concerning the sex of the respondents and their attained educational level. Two categories are prominent and

Table 1. Selected characteristics of respondents

Characteristic	Number	Percent
<b>Sex</b>		
Female	90	64
Male	<u>50</u>	<u>36</u>
Total	140	100
<b>Age</b>		
62-72	66	47
73-83	57	40
84-94	<u>17</u>	<u>12</u>
Total	140	100
<b>Education</b>		
None	3	2
1-3 grade	9	7
4-6 grade	20	14
7-9 grade	31	22
10-11 grade	25	18
High school	32	23
Vocational	0	0
1-2 yr. college	13	9
B.S.	6	4
M.S.	<u>1</u>	<u>1</u>
Total	140	100
<b>Birthplace</b>		
North	2	1
South	103	74
East	4	3
Midwest	21	15
West	1	1
Southwest	7	5
Caribbean	<u>2</u>	<u>1</u>
Total	140	100
<b>Years in Detroit</b>		
Less than one year	1	1
1-2 years	0	0
2-5 years	3	2
5-8 years	2	1
8-10 years	7	5
Over 10 years	<u>127</u>	<u>91</u>
Total	140	100

Table 2. Reasons respondents moved to the senior citizen's apartments

Reasons	Frequency	Percent
Size	27	20
Convenience	49	36
Expense	31	23
Condition	27	20
Other		<u>1</u>
Total	140	100

Table 3. Educational level by sex of the respondent

Age interval	Sex	
	Male	Female
62-72	20 (40%)	46 (51%)
73-83	24 (48%)	33 (37%)
84-99	6 (12%)	11 (12%)

Table 4. Respondents' age by marital status

Age	Marital status				
	Married	Separated	Divorced	Widowed	Never married
62-72	12 (44%)	12 (63%)	12 (63%)	26 (38%)	4 (67%)
73-83	14 (52%)	5 (26%)	5 (26%)	31 (45%)	2 (33%)
84-99	1 (4%)	2 (11%)	2 (11%)	12 (17%)	0 (0%)

Table 5. Respondent's sex by attained educational level

School interval	Sex	
	Male	Female
None	2 (4%)	1 (1%)
1-3	6 (12%)	3 (3%)
4-6	7 (14%)	13 (14%)
7-9	14 (28%)	17 (19%)
H.S.	9 (18%)	16 (18%)
Voc.	10 (20%)	22 (25%)
1-2 yr. col.	1 (2%)	12 (13%)
B.S./B.A.	1 (2%)	5 (6%)
M.S.	0 (0%)	1 (1%)

indicate that respondents have either at least a seventh grade education or a vocational/technical degree. When cross tabulations were done on the respondents' birthplace and educational level, it was found that the majority of the respondents were born in the South and had at least a ninth grade education. Another cross tabulation was done to examine the respondents' age and their educational level. The majority of the "young old" (see definition of terms) had a higher educational level than the "old old." But one person in the "old old" category attained a college degree, whereas no one in the "young old" group had obtained a college degree.

#### B. Testing of Hypothesis 1

Each respondent was asked a series of questions that dealt with hypothesis 1. The measurement of long-term commitments requiring continuous availability or proximity referred to support in the need areas of: keeping track of bills, cleaning the apartment, preparing the daily meals and assuming responsibility for the respondent while hospitalized. Therefore, this hypothesis has four subhypotheses that measured a specific aspect of hypothesis 1.

##### 1. Hypothesis 1

There was no significant difference in the frequency of help provided by a specific primary group member on support concerning long-term commitments requiring continuous proximity.

a. Hypothesis 1A There was no significant difference by sex or marital status in the frequency of help provided by a specific primary



group member on helping the respondents keep track of their bills.

Sixty-seven percent of the respondents indicated that they did not need help in keeping track of their bills. Due to the low number of frequencies per cell, the cross tabulation results from the chi-square table were considered invalid. Therefore, this hypothesis could not be affirmed or rejected.

b. Hypothesis 1B There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member in helping the respondents clean their apartments. (Each person was asked who helped them clean their apartment.)

i. Sex Table 6 revealed that a significant difference in sex of the respondent was noticed. The majority (79%) of the males

Table 6. Primary groups that help the respondents clean their apartment by sex of the respondent

Primary group	Sex	
	Male	Female
Relatives	22 (79%)	20 (44%)
Nonrelatives	6 (21%)	25 (56%)
$\chi^2 = 6.8901^{**}$	alpha = .05	1 df = 3.8414

\*\*Significant at the .01 level.

said that relatives helped them in comparison with the majority of the females (56%) identifying nonrelatives as the primary group

that helped them. In reference to sex of the respondent, Hypothesis 1B was rejected.

ii. Marital status It can be discerned from Table 7 that there was a significant difference in the primary group chosen when the

Table 7. Primary groups that help respondents clean their apartments by marital status of the respondent

Primary group	Marital status		
	Married	Widowed	Single
Relatives	18 (95%)	18 (49%)	8 (35%)
Nonrelatives	1 (5%)	19 (51%)	11 (65%)
$\chi^2 = 15.4002^{**}$	alpha = .05		2 df = 5.9914

\*\*Significant at the .01 level.

variable marital status was reviewed. A relationship between the respondents' marital status and the primary group chosen existed. The majority of the widowed (51%) and the single (65%) answering this question indicated that nonrelatives helped them clean their apartment, whereas the married respondents pointed out that relatives are most helpful in this area of assistance. Tables 6 and 7 have significant chi-square values; therefore, hypothesis 1B was rejected.

c. Hypothesis 1C There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member in helping the respondent in the preparation of meals.

Each respondent was asked if anyone helped them prepare most of their meals. The majority (70%) of the respondents said no one helped them. This caused a low number within each category or cell, making categorization meaningless. Therefore, a chi-square was not run.

d. Hypothesis 1D There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent is hospitalized.

Each respondent was questioned about who would assume responsibility for the respondents' affairs if they had to be hospitalized.

i. Sex As reported in Appendix Table G1, the sex of the respondent was not related to the primary group chosen to assume responsibility for the respondent's affairs. The percentage of responses by males and females in almost every category was very similar. More than 60% of the male and female respondents reported that close relatives would assume the responsibility for this support.

ii. Marital status When marital status was considered, it was found that regardless of the respondent's marital status, relatives assumed this responsibility (Table 8). The widowed (23%) indicated that distant relatives also assisted in this need area, and the single (18%) reported that nonrelatives assumed this responsibility. The  $\chi^2$  in Table 8 revealed that there was a significant difference in the observed and expected frequencies. This indicated that the marital status of the respondent was related to the primary group chosen.

Table 8. Primary group assuming responsibility for the respondents while in the hospital by the marital status of the respondent

Primary group	Marital status		
	Married	Widowed	Single
Close relatives	26 (96%)	38 (56%)	27 (71%)
Nonrelatives	0 (0%)	11 (16%)	7 (18%)
Distant relatives	1 (4%)	19 (23%)	4 (11%)
$\chi^2 = 28.0152^{**}$		alpha = .05	2 df = 5.9914

\*\*Significant at the .01 level.

### C. Testing of Hypothesis 2

#### 1. Hypothesis 2

There was no significant difference for a specific primary group member on help concerning long-term commitments without continuous proximity.

Each respondent was asked a series of six questions that tested hypothesis 2. Therefore, this hypothesis has six subhypotheses that measured a specific aspect of hypothesis 2. This hypothesis investigated help that required long-term commitments without continuous proximity and included questions on:

- (1) Who would accompany the respondent when paying bills?
- (2) Who would accompany the respondent when cashing a check?

- (3) Who sends the respondent money on a regular basis?
- (4) Who would help the respondents if they were ill at home for two-three weeks?
- (5) Who would communicate with the medical personnel if the respondent was hospitalized?
- (6) Who would help the respondents when they were feeling low?

a. Hypothesis 2A There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member accompanying them while paying their bills.

Each respondent was asked if anyone accompanied them when making payments on their bills. Seventy-one percent of the respondents stated that they mail their bill payments or that someone took the payment in for them. This caused a low number within each category or cell, making categorization meaningless. Therefore, this hypothesis could not be affirmed or rejected.

b. Hypothesis 2B There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondents needed someone to go with them to cash a check.

Fifty-six percent of the respondents stated that either their checks were deposited directly into their account or that they don't need anyone to go with them. But for those respondents that did require support in this area, further examination was conducted.

i. Sex The observed frequencies and percentage of primary group members named as providers of support in this area are presented

in Appendix Table G2. From this, it was concluded that no significant difference in the observed and expected frequencies existed.

ii. Marital status The chi-square value computed in Table 9 indicated that hypothesis 2B was rejected since a relationship between

Table 9. Primary groups that accompany the elderly when cashing checks by respondent's marital status

Primary groups	Marital status		
	Married	Widowed	Single
Relatives	13 (100%)	14 (39%)	3 (27%)
Nonrelatives	0 (0%)	22 (61%)	8 (73%)
$\chi^2 = 17.0505^{**}$	alpha = .05		2 df = 5.9914

\*\*Significant at the .01 level.

the primary group chosen for this specific type of support and marital status existed. Both the widowed (61%) and the single (73%) stated that nonrelatives provide most of the support when they need someone to go along with them to cash a check. It can also be observed in this table that the married respondents received more support from relatives than did the widowed or single respondents.

c. Hypothesis 2C There was no significant difference by sex or marital status in the frequency of sending the respondent money on a regular basis by a specific primary group member.

Ninety-five percent of the respondents stated that no one sent them money on a regular basis. Due to this, a cross tabulation by sex or marital status was not done because it would yield meaningless information. Hypothesis 2C was affirmed.

d. Hypothesis 2D There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent was ill at home.

i. Sex In reference to the sex of the respondent, it can be observed in Appendix Table G3 that no significant difference was found between the observed and expected frequencies. Hypothesis 2D was affirmed.

ii. Marital status The chi-square in Table 10 indicated that a significant difference existed, indicating that the observed

Table 10. Primary groups that assist the respondents when sick by respondent's marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	26 (100%)	39 (60%)	16 (50%)
Nonrelatives	0 (0%)	26 (40%)	16 (50%)
$\chi^2 = 37.4240^{**}$	alpha = .05		2 df = 5.9914

\*\*Significant at the .01 level.

frequencies did tend to differ from the expected frequencies. All three groups stated that relatives provided support but the widowed (40%) and single (50%) also purported that nonrelatives are very helpful. This factor cannot be denoted from the married respondents' answers. A relationship between the marital status of the respondent and the primary group chosen existed.

e. Hypothesis 2E There was no significant difference by sex or marital status in the frequency of a specific primary group member talking with the medical personnel during the hospitalization of the respondent.

Each respondent was asked a question that concerned a hypothetical situation: If you had to be admitted to a hospital, who would talk to the nurses and doctors concerning your condition? The responses were examined by sex and marital status of the respondent to determine if a relationship existed.

i. Sex Regardless of the sex of the respondent, the primary group chosen to fulfill this commitment was the relatives. This can be observed in Appendix Table G4. The chi square showed that no significant relationship between the sex of the respondent and the primary group existed.

ii. Marital status The chi-square value computed in Table 11 indicated that hypothesis 2E was rejected. While 96% of the married respondents stated that relatives contribute most of the support, only 63% of the widowed considered the relatives to provide an important amount of support. A relationship between the marital status of the



Table 11. Primary groups that talk to the nurses when respondents are in the hospital by respondents' marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	26 (96%)	38 (63%)	24 (75%)
Nonrelatives	1 (4%)	22 (37%)	8 (25%)
$\chi^2 = 19.5809^{**}$	alpha = .05		2 df = 5.9914

\*\*Significant at the .01 level.

respondent and the primary group chosen did exist.

f. Hypothesis 2F There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent was feeling low.

Each respondent was asked who they talked to when they felt low or upset. For the purpose of this research, sex and marital status of the respondent were examined in reference to their answer to the question.

ii. Sex The observed frequencies and percentage of the primary group named by the respondents are presented in Appendix Table G5. The majority of the males (50%) stated that they talk with relatives when they feel low or upset. Yet, the majority of the females report that God offered the most support here. From the chi-square value in Appendix Table G6 it can be discerned that Hypothesis 2F was affirmed.

ii. Marital status In Appendix Table G6, the respondents' marital status and the primary group chosen to fulfill this support are examined to see if any relationship between the two variables existed. The chi-square value in Appendix Table G6 indicated that no relationship existed. A high percentage of the widowed (37%) and the single (41%) reported that God provided them with support. But the married perceived their relatives to be most helpful when they were upset or feeling low.

#### D. Testing of Hypothesis 3

##### 1. Hypothesis 3

There was no significant difference in the utilization of a specific primary group member on help concerning short-term commitments.

Each respondent was asked a series of four questions covering different short-term commitments. Therefore, this hypothesis has four subhypotheses that measured different aspects of hypothesis 3. The four questions were:

- (1) Who helps you fix small things in your apartment if something goes wrong?
- (2) Who would you borrow a few dollars from if you ran short of money?
- (3) Who would help the respondent store items in their apartment?
- (4) Who would you borrow from if you needed to borrow an egg or a cup of sugar?

a. Hypothesis 3A There was no significant difference by sex or marital status in the frequency of help provided by a specific primary

group member when a small item in the respondent's apartment was malfunctioning.

i. Sex It can be discerned from Appendix Table G7 that the sex of the respondent was not related to the primary group chosen by the respondent to fix small, malfunctioning items in their apartment. The majority of the respondents claimed that hired help was the most often supplied support in this area.

ii. Marital status When the respondent's perception of the most helpful primary group in this need area was compared to their marital status, the percentage of responses to this question was highest in the paid help category for married, widowed and single. The smallest percentage of responses fell in the nonrelative category. Other categories and percentages classified by the marital status of the respondents are outlined in Appendix Table G8. No significant differences were found in this comparison, indicating that marital status was not related to the respondents' perceptions of the most helpful primary group.

b. Hypothesis 3B There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent needed to borrow money.

i. Sex The responses of the respondent were analyzed according to their sex. When this was done, it was found that 51% of the males would borrow money from nonrelatives, but only 29% of the females would borrow from nonrelatives. Seventy-one percent of the females stated that relatives were the primary group from whom they would borrow money. Hypothesis 3B was rejected because there was a significant

difference in the observed and expected frequencies. Results may be observed in Table 12.

Table 12. Primary groups whom the respondents turn to when they run short of money by respondents' sex

Primary group	Sex	
	Male	Female
Relatives	17 (49%)	52 (71%)
Nonrelatives	18 (51%)	21 (29%)
$\chi^2 = 4.3295^*$	alpha = 0.0375	1 df = 3.8414

\*Significant at the .05 level.

ii. Marital status When the respondents' choice of the primary group from which they could borrow money was compared to the marital status of the respondent, data in Table 13 indicated the choice of the

Table 13. Primary groups whom the respondents turn to when they run short of money by respondents' marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	18 (82%)	41 (70%)	10 (37%)
Nonrelatives	4 (18%)	18 (30%)	17 (63%)
$\chi^2 = 12.3062^{**}$	alpha = .05	1 df = 5.9914	

\*\*Significant at the .01 level.

primary group varied, the respondents' choice of primary group and marital status was related. Both the married and the widowed indicated that relatives offered the most support. But the respondents who were single identified the nonrelatives as the most helpful. The chi-square value computed in Table 13 revealed that there was a significant difference in the expected and observed frequency of the primary group chosen by the respondents when they needed to borrow money.

c. Hypothesis 3C There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondents needed to store items.

i. Sex It can be discerned from Appendix Table G9 that the sex of the respondent was not related to the respondents' choice of the primary group that helped them in this area. Regardless of the respondent's sex, the majority stated that no one helped them.

ii. Marital status It can be observed from Appendix Table G10 that the majority of the respondents identified relatives as the providers of support in this area. The majority of the single respondents said no one helped them. There was no association between the primary group chosen and the respondents' marital status.

d. Hypothesis 3D There was no significant difference by sex or marital status in the frequency of help provided by a specific primary group member when the respondent needed to borrow a nonmonetary item.

i. Sex Appendix Table G11 indicated that Hypothesis 3D was affirmed. Regardless of the sex, nonrelatives were perceived to be the most supportive in this need area. No relationship between the

primary group chosen and the respondents' sex existed.

ii. Marital status Table 14 illustrated that the majority of the married (81%), widowed (98%), and single (97%) indicated that when

Table 14. Primary groups whom the respondents borrow nonmonetary items from by the marital status of the respondent

Primary groups	Marital status		
	Married	Widowed	Single
Relatives	4 (19%)	1 (2%)	1 (3%)
Nonrelatives	17 (81%)	50 (98%)	29 (97%)
$\chi^2 = 8.3431^*$	alpha = .05		2 df = 5.9914

\*Significant at the .05 level.

they needed to borrow a nonmonetary item, non-relatives offered the most support. The chi-square value computed in Table 14 indicated that there was a significant difference in the frequency of the observed and the expected frequencies. Hypothesis 3D was rejected.

#### E. Testing of Hypothesis 4

##### 1. Hypothesis 4

There was no significant difference in the utilization of a specific primary group member on issues pertaining to help during an emergency or crisis situation on the following variable: sex.

Each respondent was asked: If you had a sudden sickness or

continuing pain, who would you go to first to help in getting rid of the pain or sickness? The responses were examined to see if there was a difference between the observed and expected frequencies. The frequency of responses and percentages for the sample are presented in Table 15. The chi-square value computed in this table indicated that

Table 15. Primary groups whom the respondents turn to when they have a sudden or continuing pain by sex of the respondent

Primary groups	Sex	
	Male	Female
Relatives	13 (27%)	8 (9%)
Nonrelatives	3 (6%)	16 (19%)
Medical personnel	33 (67%)	61 (72%)
$\chi^2 = 9.4349^{**}$	alpha = .05	2 df = 5.9914

\*\*Significant at the .01 level.

hypothesis 4 was rejected. There is a significant difference in the observed and expected frequencies of the primary group approached for help. Therefore, hypothesis 4 was rejected. Regardless of the sex of the respondents, the majority of each sex category implied that they turned to medical personnel when sudden pain occurred. The second most frequent choice for the males was relatives and for the females it was non-relatives.

## F. Testing of Hypothesis 5

### 1. Hypothesis 5

There was no significant difference in the frequency of interaction with specific primary group members.

This hypothesis required the testing of two subhypotheses. Each was concerned with the measurement of a specific aspect of hypothesis 5. The respondents were asked: How important is it for parents and their married children to keep in touch by phone, letters or visits?

a. Hypothesis 5A There was no significant difference by sex in the importance of interaction between married children and their parents.

The respondents had four choices of answers. But they stated that it was either important or very important and did not pick any of the other choices. It can be discerned from Appendix Table G12 that Hypothesis 5A was affirmed. Regardless of the respondents' sex, the most frequent answer was that it was very important for married children and their parents to interact.

b. Hypothesis 5B There will be a positive relationship among the activities.

Each respondent was asked:

- (1) How often do you talk to at least one of your children, close friends, and relatives other than your children on the telephone?
- (2) How often do you receive a letter from at least one of your children, close friends, and relatives other than your children?



- (3) How often do you see at least one of your children, close friends and relatives other than your children?
- (4) How often do you talk to at least one of your neighbors on your floor?

Thus, 10 variables for this analysis were examined. The responses were coded and categorized as: at least once a day, at least once a week, at least once a month, several times a year, once a year, or never. Since the variables represent amount of contact, the Pearson correlation coefficient was utilized to test the relationships among types of contact and primary groups. One-third of the positive significant relationships involved receiving letters from various primary groups. The significant positive relationships mean that the amount of contact was related for the two variables being examined. The fifteen positive significant relationships can be seen in Table 16 and were:

- (a) The frequency of talking to children on the phone was correlated with the frequency of seeing their children.
- (b) The frequency of talking with neighbors was correlated with the frequency of talking with relatives other than their children.
- (c) The frequency of receiving letters from their children was correlated with the frequency of letters received from relatives other than children.
- (d) The frequency of receiving letters from their children was correlated with the frequency of letters received from friends.
- (e) The frequency of seeing their children was correlated with the frequency of seeing relatives other than their children.

- (f) The frequency of seeing their children was correlated with the frequency of receiving letters from relatives other than children.
- (g) The frequency of talking with neighbors was correlated with the frequency of talking with relatives other than children.
- (h) The frequency of talking with neighbors was correlated with the frequency of seeing relatives other than children.
- (i) The frequency of talking with neighbors was correlated with the frequency of talking with a friend on the phone.
- (j) The frequency of talking with neighbors was correlated with the frequency of seeing friends.
- (k) The frequency of talking with relatives other than children was correlated with the frequency of seeing relatives other than children.
- (l) The frequency of talking with relatives other than children was correlated to the frequency of seeing friends.
- (m) The frequency of receiving letters from relatives other than children was correlated to the frequency of receiving letters from friends.
- (n) The frequency of talking on the phone with a friend was correlated with the frequency of seeing a friend.
- (o) The frequency of talking on the phone with a friend was correlated with the frequency of receiving letters from friends.

One significant negative relationship was found and indicated that there was a tendency for those persons receiving letters from their children to talk less to their neighbors. Fifteen of the forty-five correlations done

Table 16. Pearson correlation matrix

	Child phone	See child	Child write	Neighbor talk	Rela- tive talk	See rela- tives	Rela- tives write	Phone friend	See friend
See child	.6548** N=103								
Child write	.0826 N=101	.0290 N=100							
Neighbor talk	-.0235 N=104	.0516 N=103	-.2921** N=101						
Relative talk	.1018 N=104	.1180 N=103	.0323 N=101	.1717* N=137					
See relatives	.1464 N=104	.1874* N=103	.1115 N=101	.1463* N=136	.5338** N=136				
Relatives write	.118 N=103	.1726* N=102	.2209* N=100	.0740 N=136	.0170 N=136	.0354 N=135			
Phone friend	-.1460 N=102	-.1266 N=101	-.0608 N=99	.3923** N=136	.0407 N=135	.0630 N=134	.1985 N=134		
See friend	-.0429 N=103	.0319 N=102	-.0040 N=100	.2999** N=137	.1600* N=136	.0056 N=135	.0340 N=135	.5473** N=136	
Friend write	.0252 N=103	-.1536 N=102	.1744* N=100	.0662 N=136	-.0215 N=135	.0168 N=135	.1556* N=134	.1462* N=135	.0701 N=136

\*Significant at .05 level.

\*\*Significant at .01 level.

were significantly correlated; due to this, hypothesis 5B was rejected.

#### G. Testing of Hypothesis 6

##### 1. Hypothesis 6

There was no significant difference in the primary group chosen by the elderly to participate in free-time activities at home, entertainment outside the home and religious activities.

This hypothesis had three subhypotheses that measured a specific aspect of hypothesis 6.

a. Hypothesis 6A There was no significant difference by sex or marital status in the frequency of the respondents' request for a specific primary group member to accompany them to church.

i. Sex The chi-square value computed in Appendix Table G13 indicated that hypothesis 6A was affirmed. There was no significant difference in the observed and expected frequency of the primary group chosen to accompany the respondents to church.

ii. Marital status It can be observed in Table 17 that there is a significant difference in the observed and the expected frequencies. The majority of the married respondents (89%) asked relatives to accompany them to church. But the widowed (80%) and single respondents (79%) asked nonrelatives to participate in this activity.

b. Hypothesis 6B There was no significant difference by sex or marital status in the frequency of the respondents' request for a specific primary group member to accompany them to a social club event.

i. Sex When the respondents were asked who would they invite to attend a social event with them, the responses were varied. The

Table 17. Primary groups that accompany the respondents to church by marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	24 (89%)	11 (20%)	7 (21%)
Nonrelatives	3 (11%)	43 (80%)	26 (79%)
$\chi^2 = 54.9657^{**}$			2 df = 5.9914
alpha = .05			

\*\*Significant at the .01 level.

male respondents chose to ask relatives, but the females preferred to ask nonrelatives. Hypothesis 6B was rejected, indicating a significant relationship between choice of primary group member and sex (Table 18).

Table 18. Primary groups that accompany the respondent to social club events by sex of the respondent

Primary group	Sex	
	Male	Female
Relatives	22 (52%)	14 (20%)
Nonrelatives	20 (48%)	57 (80%)
$\chi^2 = 13.3073^{**}$		1 df = 3.8414
alpha = .05		

\*\*Significant at the .01 level.

ii. Marital status It can be observed in Table 19 that the computed chi-square value indicated that Hypothesis 6B was rejected.

Table 19. Primary groups that accompany the respondent to social club events by the respondents' marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	25 (93%)	5 (9%)	6 (19%)
Nonrelatives	2 (7%)	50 (91%)	25 (81%)
$\chi^2 = 76.6164^{**}$	alpha = .05		2 df = 5.9914

\*\*Significant at the .01 level.

Examination of Table 19 showed that the majority of the widowed (91%) and single (81%) preferred to ask nonrelatives to join them in social activities, whereas the married respondents spent this time with relatives. Twenty-four percent of the single respondents stated that no one attended social functions with them.

c. Hypothesis 6C There was no significant difference by sex or marital status in the frequency of the respondents' request for a specific primary group member to join them in a free-time activity at home.

i. Sex The calculated chi-square value in Table 20 indicated that Hypothesis 6C was rejected. A significant difference in the observed and the expected frequencies of the primary group in relation to sex existed. Both sexes chose to spend this time with nonrelatives. But 47% of the males preferred to spend their free time with relatives. This was not characteristic of the females in this study.

Table 20. Primary groups that share free-time activities with the respondent by sex of the respondent

Primary group	Sex	
	Male	Female
Relatives	18 (47%)	14 (19%)
Nonrelatives	20 (53%)	59 (81%)
$\chi^2 = 10.1838^{**}$	alpha = .05	1 df = 3.8414

\*\*Significant at the .01 level.

ii. Marital status The calculated chi-square value in Table 21 was significant, indicating a difference in the observed and

Table 21. Primary groups that share free-time activities with the respondent by the respondent's marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	21 (78%)	7 (14%)	4 (14%)
Nonrelatives	6 (22%)	49 (86%)	24 (86%)
$\chi^2 = 61.9240^{**}$	alpha = .05	2 df = 5.9914	

\*\*Significant at the .01 level.

expected frequency of the primary group in relation to marital status. The majority of the widowed (86%) and single respondents (86%) chose to spend free time with nonrelatives. But the married respondents spent

their free time with relatives.

d. Hypothesis 6D The order of frequency will be the same for all three types of activities.

The responses from Hypotheses 6A, 6B and 6C were further analyzed to see if they were related. However, due to the low number of frequencies per cell, the gamma statistical test results from the chi-square table were considered invalid. Therefore, this hypothesis could not be affirmed or rejected.

#### H. Testing of Hypothesis 7

##### 1. Hypothesis 7

There was no significant difference in the perceived expectations of the black elderly on support concerning residence and financial help provided by adult children.

This hypothesis had three subhypotheses that examined three specific aspects of the hypotheses.

a. Hypothesis 7A There was no significant difference by the educational status of the respondent in the perception about the care adult children should provide when parents are sick.

The respondents were asked their opinion on the following statement: When parents are sick, adult children should take care of their parents in whatever way is necessary. Regardless of the respondents' educational status, the respondents agreed with the statement.

Hypothesis 7A was affirmed.

b. Hypothesis 7B There was no significant difference by the educational status of the respondents in their perception about adult



children giving parents financial help.

The respondents were asked to voice their opinion on the following statement: Adult children should give their parents financial help. The majority of the respondents in each educational category agreed with this statement. The calculated chi-square value indicated that hypothesis 7B was affirmed. There was no relationship between the two variables (Appendix Table G15).

c. Hypothesis 7C There was no significant difference by the educational status of the respondents in their perception about the kinds of help sons and daughters provide.

The respondents were asked their opinion on the following statement: Sometimes parents need temporary help from their children. In your opinion, do daughters provide different kinds of help than sons, or do daughters and sons do pretty much the same thing for their parents? It can be observed in Appendix Table G16 that the perceptions of the respondents are similar. In reference to the respondents' educational status, the majority of the people agreed that daughters and sons provided the same kind of help. There was no association between the two variables.

## I. Testing of Hypothesis 8

### 1. Hypothesis 8

There was no significant difference in the elderly's preference for housing.

The testing of Hypothesis 8 required the examination of three

subhypotheses. Each one investigated a specific aspect of Hypothesis 8.

a. Hypothesis 8A There was no significant difference by the educational status of the respondents in their preference for housing in reference to a physically dependent senior citizen.

The respondents were asked their opinion on the following question: When people reach old age and are unable to care for themselves physically, where do you think they should live? Examination of Table 22

Table 22. Respondents' opinion about where physically dependent senior citizens should live by educational status of the respondent

Opinion	Educational status			
	Below 7th grade	7th-9th	High school	Beyond h.s.
Nursing home	15 (52%)	29 (59%)	16 (50%)	11 (58%)
With son or daughter	10 (35%)	15 (31%)	3 (9%)	1 (5%)
Some other place	4 (13%)	5 (10%)	13 (41%)	7 (37%)
$\chi^2 = 19.3245^{**}$	$\alpha = .05$		6 df = 15.5073	

\*\*Significant at the .01 level.

shows that the majority of the respondents in each category admitted that persons in this situation should live in a nursing home. But 41% of those persons with a high school diploma stated that physically dependent elderly persons should live some other place than with a son or daughter, another relative or nursing home. Some of the examples

given were share an apartment with someone, live in a senior citizens' complex, pay someone to live with them. Several of the respondents stated that if they became physically dependent, they would prefer to die. Hypothesis 8A was rejected because there was a relationship between the variable and the educational status of the respondent.

b. Hypothesis 8B There was no significant difference by the educational status of the respondents in their preference for housing in reference to a physically independent senior citizen.

The respondents were asked their opinion on the following question: When people reach old age and are unable to look after themselves, where do you think they should live? The chi-square value computed in Table 23 indicated a significant difference in the observed and

Table 23. Respondents' opinion about where physically independent senior citizens should live by respondents' educational status

Opinion	Educational status			
	Below 7th grade	7th-9th	High school	Beyond h.s.
Nursing home	10 (37%)	20 (39%)	17 (63%)	10 (56%)
With son or daughter	6 (22%)	16 (31%)	2 (7%)	0 (0%)
With another relative	7 (26%)	4 (8%)	3 (11%)	1 (5%)
Senior citizens building	4 (15%)	11 (22%)	5 (19%)	7 (39%)
$\chi^2 = 21.0908^*$	alpha = .05		9 df = 16.9190	

\*Significant at the .05 level.

expected frequencies. There was a relationship between the respondents' choice of housing and their educational status. Regardless of the respondents' educational status, the majority of the sample stated that persons in this situation should live in a nursing home. Thirty-one percent of those persons with at least a seventh grade education suggested that persons in this situation should live with a son or daughter.

c. Hypothesis 8c There was no significant difference by the educational status of the respondent in their preference for living near people of a specific age group.

The respondents were asked what age would they prefer their neighbors to be. The calculated chi-square value in Table 24 indicated that

Table 24. Respondent's choice of neighbors by respondent's educational status

Neighbors	Age			
	Below 7th grade	7th-9th	High school	Beyond h.s.
Own age or older	13 (43%)	28 (51%)	10 (33%)	7 (37%)
Middle-aged	6 (20%)	3 (5%)	4 (12%)	0 (0%)
All ages	2 (7%)	6 (11%)	7 (23%)	8 (42%)
Doesn't matter	9 (30%)	18 (33%)	10 (32%)	4 (21%)
$\chi^2 = 19.6773^*$	alpha = .05		9 df = 16.9190	

\*Significant at the .05 level.

there was a significant difference in the observed and expected frequencies. The majority of the respondents with an education beyond high school preferred to live near people of all ages. Persons with a high school education were divided in their views. Thirty-three percent preferred to live near people their own age or older, and thirty-two percent stated that it wouldn't matter what age their neighbors were. Hypothesis 8C was rejected because there was an association between the respondents' educational status and their choice of neighbors.

## VI. DISCUSSION

### A. Description of Selected Demographic Characteristics of the Sample

One-hundred and forty black elderly residing in age-homogenous settings were interviewed and questioned about the interaction they had with their informal social support system. The majority of the sample were female, widowed, aged 62-72 with at least a seventh grade education, and retired. The marital status of the sample reflected the biological fact that women outlive men. The largest proportion of the sample was born in the South, indicating migration from the South to the North.

The majority of the sample had lived in the age-homogenous setting for over five years and did not move to this environment as a result of retirement. The age-homogenous housing environment was identified by the respondents as being conveniently located near the places they frequented.

Seventy-two percent of the respondents had living children, and twenty-two percent of their children lived within the Detroit area. Twenty-eight percent of the sample either never had children or have no living children. The percentages reported in this discussion are based only on those persons that identified they were: receiving support from the primary groups, participating in leisure time activities, expressing opinions on filial responsibilities and interacting with members of their informal social support system. The percentages are not based on the total sample size.

## B. The Availability of Social Relationships Among Sample Members

The advances made in the modern transportation and postal systems link primary groups in one's informal social support system. The essence of one's informal social support system lies in the interaction and the relationship of its members. Based on the review of the literature, informal social support systems are available to the majority of persons living in the United States. Findings from this study substantiate this. In discussing support systems, the availability of its members is an important factor to consider. The provision of help or assistance is somewhat dependent upon the availability of the primary group members in one's support system. Table G17, page 211, presents the frequency of interaction the respondents had with specific primary group members. These are discussed in sections 1-4.

### 1. Availability and interaction with children

As stated earlier, seventy-two percent of the sample had at least one living child and twenty-eight percent did not have a living child. People interact with each other in a variety of ways. In this study, face-to-face communication, frequency of telephone calls and letters received from at least one child were observed. Initially, each respondent was asked: How often do you talk to at least one of your children on the phone? The majority (50%) of the sample stated that this activity occurred at least once a day. The respondents verbally expressed that it was very important for daily interaction with at least one of their children to occur. The respondents

were then asked: How often do you see at least one of your children? The majority of the sample reported that this activity occurred at least once a week. But forty percent of the married stated that they saw at least one of their children once a day, whereas forty-seven percent of the single respondents were involved in this activity several times a week. Inferences from these data indicate that single individuals do not see their children that often but are in constant contact with them on the telephone. When the respondents reported the frequency of receiving letters from at least one of their children, it was found that the majority did not receive letters from them. Therefore, it can be deduced that most interaction between the respondents and their children happens over the telephone.

## 2. Availability and interaction with relatives other than children

Sometimes relatives other than children offer support or assistance due to their availability. Each respondent was asked: How often do you talk to relatives other than your children? Regardless of age, sex or marital status, it was found that the respondents spoke with relatives on the phone at least once a week. Face-to-face communication is also an important measure of interaction. The findings in this study indicated that the respondents see at least one of their relatives once a week. But those who were single stated that relatives were only seen several times a year. It was found that respondents talk to relatives and see them at least once a week but do not receive letters from them. No differences in the interactional patterns in reference to age and sex



were found. Kent et al. (1972) studied the interaction patterns of both black and white elderly with their extended family. They found that the older white subjects saw other relatives more often than did the older black subjects. This finding in reference to age was not substantiated in this study. As a matter of fact, the only difference identified was in reference to the respondents' marital status and the frequency they saw other relatives. Findings in this study have shown that the black family has frequent and constant interaction with their extended family. Support for reported findings in the literature review concerning the interaction patterns present in the extended family were found.

### 3. Availability and interaction with neighbors

The review of literature revealed that various opinions about age-homogenous settings and their effect on socialization exist. Researchers have argued about its effectiveness in assisting the elderly handle some of the losses associated with aging. In this study, it was found that neighbors were available. Sixty-nine percent of the respondents report that they talk with their neighbors at least once a day. Patterns or frequency of interaction were the same regardless of the respondents' age, sex or marital status. Hypothesis 3 identified neighbors as the providers of assistance when small items needed to be borrowed in a hurry. Neighbors were found to offer support in nonpersonal matters such as shopping or participation in free time, leisure activities.

#### 4. Availability and interaction with friends

Kent et al. (1972) completed a study concerning the interaction patterns and use of support systems by black and white elderly. They found a greater frequency of visiting friends by black respondents compared to the white respondents. In this study, the frequency of seeing a friend was divided. Thirty-six percent reported seeing a friend at least once a day and thirty-six percent indicated this type of interaction occurred at least once a week. Further investigation revealed that the majority of the males saw friends at least once a day compared to the females who saw friends at least once a week. There were no differences in reference to the respondents' sex, marital status or age. Interaction over the phone was an activity that the respondents engaged in at least once a day. According to the majority (52%) of the sample, friends do not write them.

#### C. Hypothesis I

This hypothesis was concerned with the measurement of support provided for by primary groups on issues involving long-term commitments requiring continuous availability or proximity. The long-term commitments considered were support or assistance in keeping track of bills, cleaning the apartment, preparing the daily meals and assuming responsibility of the respondents' affairs while hospitalized. These activities were examined for differences in reference to the respondents' sex or marital status and therefore were divided into four subhypotheses.

Examination of the first subhypothesis revealed that the respondents indicated no help was needed or desired for this activity. They

expressed that they had very few bills and did not need help in keeping track of these. Litwak (1981) completed a study about the modified extended family and their social networks. The elderly in his study also denied needing help in keeping track of their bills. The findings from the present study are in line with Litwak's findings.

The next subhypothesis was concerned with the identification of the primary group that helped the respondents clean their apartment. When this was examined in reference to the respondents' sex, it was found that the majority of the females identified nonrelatives as providing most of this support. Included in the category of nonrelatives were friends, neighbors and paid help. But the males indicated that relatives provided them with the most support.

When this activity was examined in reference to the respondents' marital status, a significant chi-square was found. This indicated that a relationship between marital status and primary group chosen as the provider of this support existed. The majority of the married persons indicated that their spouses gave them support in this need area, while the single and widowed identified paid helpers or nonrelatives as the prime supporters.

Regardless of the respondents' sex or marital status, need for help with the preparation of daily meals was denied. Seventy percent of the respondents stated this. But thirty percent did receive assistance with the preparation of daily meals.

When a person reaches old age, hospitalization for various ailments might occur. Therefore, it is important for the individual to arrange

for some support or assistance in taking care of their affairs during this time period. Each person was given a hypothetical situation and asked who would assume responsibility of their affairs while they were hospitalized. Regardless of the respondents' sex or marital status, relatives were chosen to assume this responsibility.

Overall, when sex of the respondent was considered, the males identified relatives to be most helpful in: cleaning the apartment and assuming responsibility of their affairs while hospitalized, whereas the females identified nonrelatives as the providers of support in assuming responsibility of their affairs while hospitalized and non-relatives as providing assistance in cleaning their apartment. In this hypothesis, those incidents when the relatives were chosen as providers of support for these long-term commitments were in agreement with Litwak's (1981) theoretical orientation. Litwak contended that for matters involving long-term commitments and continuous proximity, as these did, that relatives were the prime providers of support. Those indicating relatives were also in agreement with Cantors' (1975) theoretical orientation. Cantors' compensatory model stated that children are the most helpful regardless of the support required. In reference to cleaning the apartment, only thirty-three percent of the relatives providing support were adult children, whereas fifty-one percent of the relatives assuming responsibility of the respondents' affairs while hospitalized were adult children.

#### D. Hypothesis II

Hypothesis II examined the support utilized for long-term commitments not requiring continuous proximity. Measurement of support provided in the following activities was completed. The activities involved accompanying the respondent when paying bills or cashing a check, helping the respondent at home during a short-term illness, communicating with the medical personnel during the respondents' hospitalization, and talking to the respondents when they were feeling low, checking on them on a daily basis to see if they are all right, and sending money on a regular basis. These were subdivided into subhypotheses and investigation in reference to the respondents' sex and marital status were completed. These questions covered hypothetical situations; but after several of the questions, it was asked if the identified supporter had ever helped them before. This was done in order to increase the validity to the hypothetical question.

The activities paying bills and sending money on a regular basis were not analyzed in reference to sex or marital status. The majority of the respondents reported that they mailed their bills in or that someone took payments in for them. Also, it was found that for the majority of the respondents, no one sent them money on a regular basis. The respondents stated that the only money they received were either social security checks or retirement checks.

When questioned about cashing their checks it was found that forty-three percent said no one goes with them when cashing their checks. Fourteen percent indicated that checks were deposited directly into

their account. Forty-three percent of the respondents had support with this activity. Males stated that relatives accompany them but females contended that nonrelatives were the prime providers of support. When the factor marital status was considered, another difference was found. The widowed and single pointed out that nonrelatives were the primary supporters, while the married respondents received help from relatives. A significant relationship between marital status and the primary group providing support in the area of cashing checks existed.

When individuals are sick and are restricted to bed rest, then assistance with meals, baths and other activities are needed. Both males and females in the sample received assistance from their relatives. Married, widowed and single also reported that relatives were the most helpful in this activity. But the single and widowed reported that nonrelatives are also helpful and this was not reported by the married respondents.

The respondents were asked: If you had to be admitted to a hospital, who would talk to the nurses and doctors concerning your condition? Regardless of sex or marital status, relatives were reported to provide the primary source of support.

Hill (1971) pointed out that black people have a strong religious orientation. Respondents stated that when they felt low, they prayed or talked to God. The majority reached out for religious support when they felt sad. God or other religious activities are viable cultural components that provide the black elderly with stability and comfort during emotional upsets.

Ninety-nine percent of the sample reported that someone checks on them on a daily basis to inquire about their condition. No differences in the primary provider of assistance by sex or marital status were found. Relatives interacted with the respondents and checked on them daily to determine if they were all right.

Overall relatives were reported to be the primary providers of support in the long-term commitments not requiring continuous availability. These findings are in agreement with Litwak's (1981) theoretical orientation contending that relatives provide support in the previously stated situations. But in Litwak's study of a white population, a strong religious orientation in reference to emotional support when feeling low was not found.

#### E. Hypothesis III

This hypothesis was concerned with the measurement of support provided during short term commitments. Litwak (1981) posited that these activities required speed of response and spontaneous reaction to a heterogenous array of needs. Areas investigated were: Fixing small household items, borrowing money, storing items and borrowing non-monetary items. These were examined in reference to the respondents' sex and marital status. When the respondents ran short of money, the majority of them borrowed money from relatives. But the single identified nonrelatives as being the most helpful in this situation. When storing clothes, the respondents reported that no one provided them with support. As far as borrowing nonmonetary items was concerned,

nonrelatives was the primary group most frequently utilized.

Litwak (1981) reported that nonrelatives provide support in activities that require short-term commitments. The findings from this study are in partial agreement with Litwak's theory. In reference to borrowing money, the respondents did not report nonrelatives to be the primary source of support. Therefore, this activity did not support Litwak's theory.

Cantor reported that the elderly have an ordering of preferred helpers. Family members are viewed as the most appropriate provider of support and are utilized for a heterogenous array of situations. Findings from this study did not support this because nonrelatives were the most helpful in all of the short-term commitments except in reference to borrowing money and here relatives are the most helpful.

#### F. Hypothesis IV

Which primary group did the respondents turn to on issues pertaining to sudden or emergency crisis? It was found that they turned to medical personnel for assistance. It must be noted that in each apartment building, a nurse was available twenty-four hours a day. This factor alone influenced the respondents' answer. This finding was not in agreement with Litwak's (1981) theory that indicated neighbors as being the primary provider of support. Litwak reported that sudden emergencies require speed of response and therefore neighbors are in the best situation to provide time urgent services. Cantor (1975) also indicated that neighbors provided support during emergencies or crisis situations.



### G. Hypothesis V

This hypothesis investigated the frequency of interaction the respondents had with specific primary group members. The first sub-hypothesis was concerned with the interaction between married children and their parents. Each respondent was asked: How important is it for parents and their married children to keep in touch by phone, letters or visits? The responses were examined to see if any difference in reference to sex occurred. Regardless of sex, it was described that it is very important for parents and their married children to interact.

The second subhypothesis investigated several activities involved in interacting with various primary groups. The hypothesis stated: There will be a positive relationship among the activities. Each individual was asked how often they saw, talked to, and received letters from specific primary group members (friends, children, neighbors). Each individual responded by stating at least once a day, at least once a week, at least once a month or several times a year. A significant positive relationship was found for a number of the situations. The significant positive relationships found demonstrated that the frequency of the responses was ranked the same for the two variables. For example, there was a significant relationship between how often the respondents saw their children and how often they saw their relatives. Further investigation of this revealed that the frequency of occurrence of these activities was at least once a week. Hays and Mindel (1973) reported that higher rates of interaction between family members is a frequent characteristic of the black family and not the white family.

Findings in this study indicated that the most frequent type of interaction the respondents were involved in was talking to at least one of their children on the phone. It can be inferred from this that adult children keep in contact with their parents, even though they are unable to visit them at frequent intervals.

The respondents saw and talked to relatives other than their children at least once a week. But thirty-seven percent of those persons over 72 reported seeing relatives other than children only several times a year. No differences in reference to the respondents' sex, age and marital status were found. Hays and Mindel (1973) also found that black elderly had frequent contact with members of their extended family. The frequency at which the respondents received letters from their children and other relatives was several times a year.

One significant negative relationship was observed between the number of times that at least one child writes the respondent and how often they talk with their neighbors. Findings indicated that the more the respondents talked to their neighbors, the less their kids wrote them. The reverse was also observed.

#### H. Hypothesis VI

Who the respondent spent leisure time activities with was investigated in this hypothesis. There were several subhypotheses and each was concerned with a specific aspect of leisure time activities. The first activity investigated was involved with the identification of the primary group member asked to attend church. The married persons asked relatives, usually their spouses, and the single and widowed invited

nonrelatives to accompany them to church. There were no sex differences noted. For social activities, the males asked relatives and the females asked nonrelatives. Differences were also noticed when marital status was considered. The majority of the widowed and single asked nonrelatives while the married asked relatives, usually their spouses. For free time activities, both sexes spent this time with nonrelatives. In reference to marital status, the widowed and single spent free time activities with nonrelatives, and the married spent these activities with relatives.

Overall, females and single or widowed individuals chose to participate in leisure time activities with nonrelatives. This is not an unusual occurrence because leisure time activities involve generational uniqueness that is often shared with other persons of the same age, ethnicity and cultural backgrounds. Litwak (1981) emphasized that some activities require age and occupational homogeneity. He contended that people choose groups that match their key structural characteristics such as life style, occupation, and same generation. Jackson (1972b) studied the friendship relationships among older black women and reported that the three most frequent activities with friends are visiting, religious attendance, shopping and other group attendance. Findings of this study are in agreement with both Litwak and Jackson because nonrelatives (friends and neighbors) were identified as the primary groups providing the most support in church, social and free time activities.

### I. Hypothesis VII

Hypothesis seven was concerned with the respondents' opinion about filial support or responsibility. Questions asked concerned the provision of support to sick parents and financial support of parents. The sample reported high levels of filial expectations and expressed that adult children should help their parents in whatever way possible if and when the assistance is required. They contended that daughters and sons provided their parents with the same kind of help. This is not in line with what a number of other researchers such as Litwak (1981) and Seelbach (1978) found. But these researchers investigated white populations, and this study investigated a black population. Specific differences in cultural and ethnic orientations, beliefs, mores, and family interaction patterns account for this. As stated in the review of literature, black people have a strong family orientation and an extensive working interactive involvement within the extended family. These factors alone could contribute to the respondents' high filial expectations.

### J. Hypothesis VIII

The respondents were questioned about their preference for housing utilizing several different hypothetical situations. The responses were measured to see whether a difference existed in relation to the educational status of the respondent. Therefore, several subhypotheses were studied. First, each individual was asked for an opinion on the following question: When people reach old age and are unable to care

for themselves physically, where do you think they should live? The majority of the individuals reported persons in this situation should live in a nursing home. The respondents expressed a sincere desire about not wanting to be a burden on their family. Most of the respondents did not want to live in a nursing home, but they did feel that a nursing home offered the best environment for persons faced with this dilemma. But a large percentage (41%) of those with a high school diploma felt that one should live some other place. Examples of other places were: share an apartment with someone else in the same predicament, live in a senior citizens apartment building, or pay someone to live with them. None of the other educational subdivisions had a large response rate in this category. Three percent of the sample preferred to die if they were confronted with this situation.

Then, the hypothetical situation was altered and stated: When people reach old age and are able to look after themselves but do not wish to live alone, where do you think they should live? The majority indicated that these should live in a nursing home. Further investigation yielded some unique information about those persons with at least a seventh grade education. Thirty-one percent of these individuals indicated that one should live with a son or daughter. For the remaining educational categories, the next most frequent choice was that of living in a senior citizens apartment building. The respondents continuously expressed that they did not want to be a burden on their families.

When the respondents were asked about their age preference for

neighbors, it was found that individuals with different educational backgrounds favored different situations. A significant relationship between the individuals' educational status and age preference of neighbors was related. Thirty-three percent of those with a high school diploma preferred to live near people their own age or older, and thirty-two percent indicated it wouldn't matter what age their neighbors were as long as they were friendly. But people with an education beyond high school wanted to live in an environment that had people from various age groups. They expressed that this would add some variety to the environment and to the activities that would be happening within the housing milieu.

#### K. Summary

This chapter presented a discussion of the findings of this study. Each hypothesis was discussed. Inferences concerning the hypotheses were also made when appropriate. The discussion revealed that the black elderly in the sample are involved in an active, nurturing informal social support system. This research study was also a test of race and social class in reference to informal social support systems and the help provided by primary groups.

## VII. SUMMARY/CONCLUSIONS AND RECOMMENDATIONS FOR FUTURE STUDY

### A. Summary/Conclusions

Not much was known about the interactional needs of the black elderly and the support they receive from informal social support systems. An important question was: Who do noninstitutionalized black elderly living in age-homogenous settings turn to for support or assistance in matters concerning: socialization, tasks of daily living, emergencies and finances? A review of the literature revealed that the studies concerned with the identification of primary groups that provide support to the elderly in specific need areas was conducted on white, middle-class populations. But none focused on the black elderly. Therefore, the purpose of this study was to identify primary groups that noninstitutionalized black elderly persons dwelling in federally subsidized age-homogenous residential units situated in Detroit, Michigan, perceived as being instrumental components in their informal social support system.

One hundred forty black elderly residing in age-homogenous apartment complexes were interviewed. The forty-minute personal interview focused on the identification of primary groups that offered support in specific need areas. Questions focused on assistance or support received in: financial management, emotional concerns, emergency situations, social interaction activities and household management. Several questions concentrated on getting the respondents to verbalize their perceptions about filial expectations.

Eight hypotheses were tested utilizing statistical tests such as

the chi-square and Pearson product moment correlation. Cross-tabulations in reference to the respondents' sex, marital status and educational status were completed. Significant chi-square values found in some of the hypotheses indicated that a relationship existed between the variables being measured. Each hypothesis that had significant relationships will be reported.

Hypothesis I: There was no significant difference in the frequency of help provided by a specific primary group member on support concerning long-term commitments not requiring continuous availability or proximity.

- (1) There was a significant relationship between the sex of the respondents and the primary group member that assisted them in cleaning their apartment.
- (2) There was a significant relationship between the marital status of the respondents and the primary group member that assisted them in cleaning their apartment.
- (3) There was a significant relationship between the marital status of the respondent and the primary group member that assumed responsibility for the respondents' affairs while hospitalized.

Hypothesis II: There was no significant difference in the frequency of help provided by a specific primary group member on support concerning long-term commitments not requiring continuous availability or proximity.

- (1) There was a significant relationship between the marital status of the respondents and the primary group member that accompanied them



to cash a check.

- (2) There was a significant relationship between the marital status of the respondent and the primary group member that would take care of the respondent during a short term illness.
- (3) There was a significant relationship between the marital status of the respondent and the primary group member that would talk to the medical personnel concerning the respondents' condition while hospitalized. Also, each person was asked if the identified person had helped them before. Seventy-three percent of the respondents indicated that these persons had assisted them before.

Hypothesis III: There was no significant difference in the frequency of help provided by a specific primary group member on support concerning long-term commitments without continuous proximity.

- (1) There was a significant relationship between the sex of the respondent and the primary group member from whom the respondent would borrow money. Fifty percent of the respondents reported that the identified primary group had helped them financially before.
- (2) There was a significant relationship between the marital status of the respondent and the primary group member from whom the respondent would borrow money.
- (3) There was a significant relationship between the marital status of the respondents and from whom they would borrow nonmonetary items. Thirty-five percent of the respondents indicated that the identified primary group member had helped them store items before.

Hypothesis IV: There was no significant difference in the utilization of a specific primary group member on issues pertaining to help during an emergency or crisis situation on the following variable: sex.

- (1) There was a significant relationship between the sex of the respondent and the primary group the respondent turned to when experiencing a sudden or a continuing pain. Ninety-three percent of the respondents said the identified person had helped them before.

Hypothesis VI: There was no significant difference in the primary group member chosen by the elderly to participate in free-time activities at home, entertainment outside the home and religious activities.

- (1) There was a significant relationship between the marital status of the respondents and which primary group members accompanied them to church.
- (2) There was a significant relationship between the sex of the respondents and which primary group member accompanied them to a social event.
- (3) There was a significant relationship between the respondents' marital status and which primary group members accompanied them to a social event.
- (4) There was a significant relationship between the sex of the respondents and which primary group members joined them in a free-time activity.
- (5) There was a significant relationship between the marital status of

the respondents and which primary group members joined them in a free-time activity.

Hypothesis VIII: There was no significant difference in the elderly's preference for housing.

- (1) There was a significant relationship between the educational status of the respondents and their preference for housing for physically dependent elderly persons.
- (2) There was a significant relationship between the educational status of the respondents and their preference for housing for physically independent elderly persons.
- (3) There was a significant relationship between the educational status of the respondents and the age of the neighbors they preferred to live near.

Important findings of this study were:

- (1) Relatives provided the majority of support for the respondents in matters that required:
  - (a) long-term support requiring continuous availability;
  - (b) long-term support not requiring continuous availability; and
  - (c) short-term commitments.
- (2) Non-relatives were the primary group members that the majority of the respondents chose to spend their leisure time activities with.
- (3) Medical personnel were the primary group members that the majority of the respondents turned to when experiencing sudden sickness or a continuing pain.
- (4) The respondents interacted daily with their neighbors.

- (5) The respondents had daily contact with at least one of their children, either by phone or visits.
- (6) The respondents interacted frequently with members of their extended family.
- (7) The respondents had definite high expectations concerning the provision of filial support on financial matters and assistance with activities of daily living, when needed. But in reference to adult children feeling responsible for their parents, the responses varied. Thirty-nine percent agreed with the statement and thirty-one percent disagreed with the statement.
- (8) The respondents had a strong religious orientation.
- (9) The respondents did not wish to be a burden on their families and preferred to live in a nursing home when they were incapable of taking care of themselves.
- (10) The respondents preferred to live in a nursing home if they were physically independent and did not wish to live alone.
- (11) The respondents had definite perceptions about the ages of the neighbors they preferred to live near. They either chose to live near people their own age or did not care about the age of their neighbors.

It can be concluded that the well-being and autonomy of the elderly are highly dependent upon the presence or absence of a functional informal social support system. In general, whether primary involvement is with family, friends, neighbors or significant others, the use of an informal social support system is a ubiquitous occurrence. The persons

in the sample did not exemplify a pattern or state of isolation. They were an active, integral component of a viable informal social support system. The extended family was actively involved in the help exchange patterns of the black elderly in this study.

It was apparent that family members were the primary informal resources for both instrumental service and socioemotional support. The importance of the family as a major primary group providing a heterogenous array of support to the elderly has been demonstrated by this study. This information can be used to recognize the range of behavior within the black elderly population and determine whether it is best to use similar means or programs to meet what appears to be the same wishes in different ethnic groups. These findings also underline the need for professionals working in gerontology to become sensitive and informed about the differences in perception and use of informal social support systems among persons of varied ethnic backgrounds.

#### B. Recommendations for Future Research

This study raised several questions in regard to informal social support systems and primary group members providing support to independent black elderly. Consequently, it is recommended that future research studies should:

- (1) Include questions on the interview schedule that would elicit information about who the respondent would turn to if the initial identified primary group was not available;
- (2) Study geographical propinquity and observe its effect on the

support provided to black elderly from their informal social support system;

- (3) Study the functional interactional relationship between age and sex peers;
- (4) Investigate the physically independent black elderly living in private homes to determine the function of the informal social support system and the provision of support by primary group members;
- (5) Investigate the effect social class has on filial expectations of middle-class black adults and their parents; and
- (6) Investigate the effect social class has on filial expectations of middle-class black adults and middle-class white adults.

The aim of this study was to identify the support primary group members provide to noninstitutionalized black elderly living in age-homogenous apartments within an urban setting. This does not determine the amount of support primary groups provide to independent black elderly living in other housing situations. But this study does provide demographic information about black elderly living in age-homogenous apartments in Detroit, Michigan. It also identified the types of support that specific primary group members provide to black elderly living in the described environmental setting. Managers of these apartment buildings can use information from this study to develop programs that would provide supplemental support to the primary group members assisting elderly persons in an array of heterogenous interactional and functional needs. Programs can be developed that encourage relatives,

friends and neighbors to provide whatever type of functional support they can to black elderly living in age-homogenous apartments. This type of program is important if black elderly are to maintain a maximally feasible level of independence and a satisfactory social adjustment during the aging process. Programs can also be developed that reinforce the elderly's informal social support system with new contributing primary groups. Utilization of an informal social support system is a ubiquitous occurrence and the well-being of the elderly is highly dependent upon the functioning of this support system. The black elderly are not abandoned by family members, friends or neighbors but are an integral unit within an active, nurturing and interacting informal social support system.

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X. APPENDIX A. A STUDY OF BLACK SENIOR CITIZENS AND THEIR  
SOCIAL RELATIONSHIPS

INTERVIEW SCHEDULE

Iowa State University

A STUDY OF BLACK SENIOR CITIZENS  
AND THEIR SOCIAL RELATIONSHIPS

Interviewer \_\_\_\_\_

Starting Time \_\_ : \_\_

Date        
MO DAY

Respondent's I.D. \_ \_ \_

Sex of respondent 1. Male  
2. Female

(Introduce yourself by saying:)

My name is \_\_\_\_\_ and I am from Iowa State University. We are currently interviewing \_\_\_\_\_ persons in the Detroit community to find out how they get help when they need it and who helps them. We are also interested in identifying the services that relatives, friends and neighbors do to help each other.

Your ideas, experiences and opinions will help \_\_\_\_\_ elderly persons throughout the United States. In talking with me you are contributing important information that will help to identify problems people have as they get older. Your ideas will help us to develop possible solutions. In other words, you will be helping to make the situation better for future generations and perhaps for you too.

Your building managers gave me permission to interview residents of this building. Your responses will be held in the strictest confidence. Your name is not on this questionnaire, and will not be associated with the responses you give. If any questions are too personal you have the right to refuse to answer. Your help will be greatly appreciated.

[INTERVIEWER: CIRCLE APPROPRIATE RESPONSE OR WRITE IN ANSWERS IN THE BLANKS PROVIDED. READ THE RESPONSES OUT LOUD, UNLESS OTHERWISE INDICATED. DO NOT READ THE PHRASE "NO RESPONSE."]

First of all, I would like to talk to you about yourself:

1. Where were you born, that is what state or foreign country?

\_\_\_\_\_

2. How old were you on your last birthday? \_\_\_\_\_

3. Are you currently:

1. Married
2. Separated
3. Divorced
4. Widowed
5. Never was married
7. Other (explain) \_\_\_\_\_

9. NO RESPONSE \_\_\_\_\_

4. How many years have you been living in Detroit?

1. Less than one year
2. 1-2 years
3. 2-5 years
4. 5-8 years
5. 8-10 years
6. Over ten years
9. NO RESPONSE

5. When you moved to Detroit, did you move because of ...

1. Job
2. Family
3. Other (explain) \_\_\_\_\_

9. NO RESPONSE, DON'T KNOW \_\_\_\_\_

6. What was the highest grade of regular school you completed? (DO NOT READ RESPONSES)

- |                                   |                                |
|-----------------------------------|--------------------------------|
| 00. None                          | 06. Vocational, technical      |
| 01. First - third grade           | 07. One - two years of college |
| 02. Fourth - sixth grade          | 08. Bachelor's degree          |
| 03. Seventh - ninth grade         | 09. Graduate degree            |
| 04. Tenth - eleventh grade        | 10. Other (explain) _____      |
| 05. High school graduate<br>(GED) | 99. NO RESPONSE                |

7. Are you now:
1. Employed full time - 35 hours or more per week
  2. Employed part-time
  3. Unemployed
  4. Retired but working part-time
  5. Retired and not working part-time
  6. Never been employed
  7. Other (explain) \_\_\_\_\_
  8. NO RESPONSE
8. How long have you lived in this apartment building?
1. Less than 6 months
  2. Six months to a year
  3. 1-2 years
  4. 2-3 years
  5. 3-4 years
  6. 4-5 years
  7. More than 5 years
  8. Other (explain) \_\_\_\_\_
  9. NO RESPONSE
9. Many people move around the time of retirement. Did you move to this apartment building around the time of your (your spouse's) retirement?
1. Yes
  2. No
  8. Does not apply
  9. NO RESPONSE
10. I am interested in knowing why you moved to this apartment building: I am going to read you a list of answers. Please let me know which of these reasons are why you moved to this building. [CAN GIVE MORE THAN ONE ANSWER.]
1. Size, by this I mean that maybe your house or apartment was too large or too small.
  2. Convenience, meaning this apartment is close to the places you need. For example, the bus line, grocery store, relatives, church.
  3. Expense, by this I mean the apartment is cheaper than your previous house or apartment.
  4. Condition of living quarters, by this I mean the apartment is cleaner, newer or safer.
  5. Other (explain) \_\_\_\_\_
  9. NO RESPONSE
11. How many living children do you have? This includes stepchildren. [DO NOT READ RESPONSES]
1. Never had children (go to Q 13A)
  2. None (go to Q 13A)
  3. 1-2
  4. 3-5
  5. More than 5
  9. NO RESPONSE, DON'T KNOW

12. Now, I would like to talk to you about how near your children live to you. Could you tell me:

12A. How many of your children live in the Detroit area? \_\_\_\_\_

12B. How many of your children live in the state but not in the Detroit area? \_\_\_\_\_

12C. How many of your children live in other states (or countries)?  
\_\_\_\_\_

12D. Which states do they live in?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

13A. Is there anyone else who lives with you in your apartment?

1. Yes
2. No (go to Q 14A)
3. NO RESPONSE

13B. Who lives with you? (DO NOT READ RESPONSES)

01. Spouse/companion
02. Brother(s)
03. Sister(s)
04. Son(s)
05. Daughter(s)
06. Distant relative(s)
07. Mother
08. Father
09. Other (explain) \_\_\_\_\_
88. Not applicable
99. NO RESPONSE

Now, I am going to ask questions about who helps you take care of some of your business:

14A. If you go to get your checks cashed, like your Social Security check, does someone go along with you?

1. Yes
2. No (go to Q 15)
3. Checks deposited directly into account (go to Q 15)
9. NO RESPONSE

14B. Who usually goes with you? [ONE ANSWER ONLY. DO NOT READ RESPONSES]

- |  |   |
|--|---|
| 01. Spouse/companion                                 | 10. Distant male relative<br>(cousin, nephew, etc.) |
| 02. Son  | 11. Sister  |
| 03. Daughter   | 12. Brother   |
| 04. Granddaughter                                    | 13. Neighbor  |
| 05. Grandson   | 14. No one  |
| 06. Mother   | 15. Other (explain) _____                           |
| 07. Father   | 88. Not applicable                                  |
| 08. Close friend                                     | 99. NO RESPONSE                                     |
| 09. Distant female relative (cousin,<br>niece, etc.) |   |

15. Which of the following ways do you pay the majority of your bills?

1. Mail in the payments (go to Q 17)
2. Go to the business
3. Pay at the bank
4. Someone takes payment for me (go to Q 17)
5. Other (specify) \_\_\_\_\_
9. NO RESPONSE

16A. When you go to pay your bills (ex. phone bills, credit card bills, etc.) does someone go with you?

1. Yes
2. No (go to Q 17)

16B. Who usually goes with you?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

17A. Does anyone help you with keeping track of your bills?

1. Yes
2. No (go to Q 18)
3. NO RESPONSE (go to Q 18)

17B. Who helps you the majority of the time?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO REPOSE             |
| 09. Distant female relative |                           |

18A. Do you have anyone who checks on you on a regular basis to see if you are alright?

1. Yes
2. No (go to Q 19)
3. NO RESPONSE

18B. Who checks on you most of the time?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

19A. Does someone help you clean your apartment?

1. Yes
2. No (go to Q 20)
3. NO RESPONSE

19B. Who helps you clean your apartment most of the time?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

20. We are interested in knowing where you get most of your hot meals. Would you say ...

1. Fix your own meal
2. Eat at a restaurant or fast food chains (go to Q 22A)
3. Eat at a special meal program for senior citizens (go to Q 22A)
4. Your relatives bring in meals (go to Q 22A)
5. Other (specify) \_\_\_\_\_ (go to Q 22A)
9. NO RESPONSE

21. Who helps you to prepare hot meals?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |



22A. Do you fix small things in your apartment if something goes wrong?  
For example, if your toaster, TV or radio acted up would you fix it yourself?

1. Yes (go to Q 23A)
2. No
9. NO RESPONSE

22B. Who helps you?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

23A. Does someone send or give you money on a regular basis?

1. Yes
2. No (go to Q 24)
9. NO RESPONSE OR REFUSED TO ANSWER

23B. Who sends or gives you money on a regular basis?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

24A. Suppose you ran short of money and had to borrow a few dollars until your check came. Who would you borrow a few dollars from?

- |                             |                           |                 |
|-----------------------------|---------------------------|-----------------|
| 01. Spouse/companion        | 10. Distant male relative |                 |
| 02. Son                     | 11. Sister                |                 |
| 03. Daughter                | 12. Brother               |                 |
| 04. Granddaughter           | 13. Neighbor              |                 |
| 05. Grandson                | 14. No one                |                 |
| 06. Mother                  | 15. Other (explain) _____ |                 |
| 07. Father                  | 88. Not applicable,       | } (go to Q 25A) |
| 08. Close friend            | doesn't borrow            |                 |
| 09. Distant female relative | 99. NO RESPONSE           |                 |

24B. Has this person ever helped you financially before?

1. Yes
8. No, not applicable
9. NO RESPONSE

25A. If you had to store things like seasonal clothes in your apartment or at the cleaners who would help you?

- |                             |                           |                 |
|-----------------------------|---------------------------|-----------------|
| 01. Spouse/companion        | 10. Distant male relative |                 |
| 02. Son                     | 11. Sister                |                 |
| 03. Daughter                | 12. Brother               |                 |
| 04. Granddaughter           | 13. Neighbor              |                 |
| 05. Grandson                | 14. No one                |                 |
| 06. Mother                  | 15. Other (explain) _____ |                 |
| 07. Father                  | 88. Not applicable,       | } (go to Q 26A) |
| 08. Close friend            | doesn't store things      |                 |
| 09. Distant female relative | 99. NO RESPONSE           |                 |

25B. Has this person helped you before?

1. Yes
2. No
9. NO RESPONSE

26A. Suppose you needed to borrow a cup of sugar or an egg, is there anyone you could borrow an item like this from?

1. Yes
2. No (go to Q 27A)
9. NO RESPONSE

26B. Who would you borrow from?

- |                             |                           |                 |
|-----------------------------|---------------------------|-----------------|
| 01. Spouse/companion        | 10. Distant male relative |                 |
| 02. Son                     | 11. Sister                |                 |
| 03. Daughter                | 12. Brother               |                 |
| 04. Granddaughter           | 13. Neighbor              |                 |
| 05. Grandson                | 14. No one                |                 |
| 06. Mother                  | 15. Other (explain) _____ |                 |
| 07. Father                  | 88. Not applicable,       | } (go to Q 27A) |
| 08. Close friend            | doesn't borrow            |                 |
| 09. Distant female relative | 99. NO RESPONSE           |                 |

26C. Have you ever borrowed items like this from this person before?

1. Yes
2. No
9. NO RESPONSE

27A. If you had a sudden sickness or continuing pain, who would you go to first to help in getting rid of the pain or sickness?

- |                             |                           |  |
|-----------------------------|---------------------------|--|
| 01. Spouse/companion        | 10. Distant male relative |  |
| 02. Son                     | 11. Sister                |  |
| 03. Daughter                | 12. Brother               |  |
| 04. Granddaughter           | 13. Neighbor              |  |
| 05. Grandson                | 14. No one                |  |
| 06. Mother                  | 15. Other (explain) _____ |  |
| 07. Father                  | 88. Not applicable        |  |
| 08. Close friend            | 99. NO RESPONSE           |  |
| 09. Distant female relative |                           |  |

27B. Has this person ever helped you when (if) you've been sick before?

1. Yes
2. No
3. Never been sick
8. Does not apply
9. NO RESPONSE, DON'T KNOW

28. If your regular doctor was not available who would you ask for the name of another doctor or clinic?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

29A. Now, I'd like you to think about people who might help you if you get ill and had to stay in bed for two or three weeks. Who, if anyone, would bring you meals, help you in and out of bed, and assist you with a bath?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain)       |
| 07. Father                  | 88. Not applicable,       |
| 08. Close friend            | wouldn't ask for help     |
| 09. Distant female relative | 99. NO RESPONSE           |

29B. Has this person ever helped you when you've been sick before?

1. Yes
2. No
9. NO RESPONSE

30. If you had to be admitted to a hospital who would talk to the nurses and doctors concerning your condition?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

31. If you were admitted to the hospital and had to name someone who would be responsible for you and your affairs, whom would you choose?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

Now, I would like to focus on activities that you might enjoy:

32. If you wanted to go to church or a religious activity who would you ask to go along with you?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

33. If you wanted to go out for entertainment such as a social club event or senior citizen program who would you ask to go along with you?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

34. If you wanted someone to join you in your free time activities, such as watching TV, or playing cards, who would you ask to join you?

- |                             |                           |
|-----------------------------|---------------------------|
| 01. Spouse/companion        | 10. Distant male relative |
| 02. Son                     | 11. Sister                |
| 03. Daughter                | 12. Brother               |
| 04. Granddaughter           | 13. Neighbor              |
| 05. Grandson                | 14. No one                |
| 06. Mother                  | 15. Other (explain) _____ |
| 07. Father                  | 88. Not applicable        |
| 08. Close friend            | 99. NO RESPONSE           |
| 09. Distant female relative |                           |

35. Sometimes parents need temporary help from their children. In your opinion, do daughters provide different kinds of help than sons or do daughters and sons do pretty much the same thing for their parents?  
[READ THE FOLLOWING RESPONSES]

1. Daughters provide different kinds of help than sons
2. Daughters and sons provide the same kinds of help
3. NO OPINION
4. NO RESPONSE, DON'T KNOW

[HAND CARD 1 TO RESPONDENT]

36. We would like your opinion on the following statements. Would you look at the card which lists choices. Please tell me if you strongly agree, agree, are not sure, disagree or strongly disagree with each of the statements. I am going to read each question. Then, you tell me your answer. [CIRCLE RESPONSE FOR EACH]

	Strongly agree	Agree	Not sure	Disagree	Strongly disagree	No response
a. Married children should live close to parents.	1	2	3	4	5	6
b. When parents are sick, adult children should take care of their parents in whatever way necessary.	1	2	3	4	5	6
c. Adult children should give their parents financial help.	1	2	3	4	5	6
d. Parents should give their adult children financial help.	1	2	3	4	5	6
Adult children should feel responsible for their parents.	1	2	3	4	5	6

37. When people reach old age and are unable to care for themselves physically, where do you think they should live? Would you say:
1. In a nursing home
  2. With a son or daughter
  3. With another relative
  4. Or some other place (explain) \_\_\_\_\_
  9. NO RESPONSE, DON'T KNOW

38. When people reach old age and are able to look after themselves but do not wish to live alone, where do you think they should live? Would you say:
1. In a nursing home
  2. With a son or daughter
  3. With another relative
  4. Or some other place (explain) \_\_\_\_\_
  9. NO RESPONSE, DON'T KNOW
39. If you had your choice of neighbors, would you prefer to live near people ...
1. Your own age or older
  2. Middle aged people
  3. Young people
  4. All ages
  5. It wouldn't matter what ages
  9. NO RESPONSE, DON'T KNOW
40. How important is it for parents and their married children to keep in touch by phone, letters or visits? Would you say it is ...
1. Very important
  2. Important
  3. Not too important
  4. Unimportant
  5. Unsure of importance
  9. NO RESPONSE, DON'T KNOW
41. If a married child has a chance to get a much better job out of town but it would mean moving away from their parents, should the adult child turn down the job to stay near their parents or should they take the job? (Place X by the answer)
1. Take the job
  2. Turn down the job
  3. Other (specify) \_\_\_\_\_
  9. NO RESPONSE, DON'T KNOW
42. When you feel low or upset who do you talk to?
- |                             |   |
|-----------------------------|---|
| 01. Spouse/companion        | 10. Distant male relative               |
| 02. Son                     | 11. Sister                              |
| 03. Daughter                | 12. Brother                             |
| 04. Granddaughter           | 13. Neighbor                            |
| 05. Grandson                | 14. No one                              |
| 06. Mother                  | 15. Other (explain) _____               |
| 07. Father                  | 88. Not applicable, don't feel that way |
| 08. Close friend            | 99. NO RESPONSE                         |
| 09. Distant female relative |   |

[HAND CARD 2 TO RESPONDENT]

For the next few questions we'd like to know how often you see or talk to certain people. How often do you ...

43.

at least once a day  
 at least once a week  
 at least once a month  
 several times a year  
 once a year  
 never  
 not applicable  
 don't know, no response

talk to at least one of your children on the phone?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

see at least one of your children?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

receive a letter from at least one of your children?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

talk to at least one of your neighbors (on the floor)?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

talk to a relative other than children on the phone?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

see a relative other than children?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

receive a letter from a relative (other than children)?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

talk to a close friend on the phone?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

see one of your close friends?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---

receive a letter from a close friend?

1	2	3	4	5	6	8	9
---	---	---	---	---	---	---	---





XI. APPENDIX B. VERIFICATION OF PERMISSION TO  
CONDUCT THE INTERVIEWS

# THE FOURMIDABLE GROUP

31555 West 14 Mile Road - Suite 213  
Farmington Hills, Michigan 48018  
Telephone: (313) 855-4400

January 27, 1984

Ms. Beverly Peoples  
129 D University Village  
Ames, Iowa 50010

This is to confirm our previous discussions giving you authorization to conduct interviews of the managers' and selected residents of Belle Maison East, Himel-hoch and River Towers for your study to determine the support groups for elderly minority.

I would like to take this opportunity to congratulate you on your selection of topics, this is an area that has not previously been expanded upon and The FourMidable Group, Inc. is proud to be a part of it.

Sincerely,



Debbi Claxton  
Property Supervisor

XII. APPENDIX C. A LETTER REQUESTING PERMISSION TO  
INTERVIEW INDIVIDUAL TENANTS

Iowa State University of Science and Technology Ames, Iowa 50011



Research Institute for Studies in Education  
College of Education  
The Quadrangle  
Telephone 515-294-7009

DEAR MR./MS. \_\_\_\_\_

MY NAME IS BEVERLY PEOPLES AND I AM A GRADUATE STUDENT AT IOWA STATE UNIVERSITY. YOUR BUILDING MANAGER, MS. \_\_\_\_\_, HAS GIVEN ME YOUR NAME AS A PERSON THAT I MAY TALK WITH ABOUT HOW SENIOR CITIZENS GET HELP WHEN THEY NEED IT AND WHO HELPS THEM. I WILL NOT ASK YOU ANY QUESTIONS ABOUT YOUR INCOME OR RENT. ANYTHING YOU TELL ME WILL BE KEPT STRICTLY CONFIDENTIAL AND YOUR NAME WILL NOT BE PUBLISHED. THIS CAN BE AN OPPORTUNITY FOR YOU TO SHARE WITH ME THE POSITIVE AND/OR NEGATIVE THINGS THAT EXIST FOR YOU AS A SENIOR.

I NEED YOU TO TALK WITH ME OR ONE OF MY ASSISTANTS FOR 30-40 MINUTES DURING THE MONTH OF FEBRUARY. DURING THE INTERVIEW YOU HAVE THE RIGHT TO REFUSE TO ANSWER ANY QUESTION. PLEASE COMPLETE THE INFORMATION ON THE ENCLOSED FORM AND RETURN IT TO YOUR MANAGER, MS. \_\_\_\_\_, BY FEBRUARY 2 SO THAT WE CAN SET UP AN APPOINTMENT TO TALK WITH YOU. INTERVIEWS WILL BE HELD IN AN OFFICE LOCATED DOWNSTAIRS IN YOUR APARTMENT BUILDING.

WE ALSO NEED YOUR PHONE NUMBER IN ORDER TO CONFIRM YOUR APPOINTMENT. YOUR TELEPHONE NUMBERS WILL REMAIN CONFIDENTIAL. I HOPE THAT YOU WILL SPEND TIME WITH ME. IF YOU HAVE ANY QUESTIONS ABOUT THIS LETTER, PLEASE CONTACT MS. \_\_\_\_\_.

SINCERELY,

*Beverly C. Peoples R.N.M.S.*

BEVERLY C. PEOPLES, R.N.M.S.  
GRADUATE STUDENT  
IOWA STATE UNIVERSITY

ENCLOSURE

Iowa State University *of Science and Technology* Ames, Iowa 50011



RETURN FORM TO  
BUILDING MANAGER BEFORE  
THURSDAY, FEBRUARY 2

*Research Institute for Studies in Education  
College of Education  
The Quadrangle  
Telephone 515-294-7009*

1. Please circle your answer:
  - a. YES, I WILL TALK WITH YOU
  - b. No, I will not talk with you
2. My phone number is \_\_\_\_\_.
3. Please circle the day you will talk with me.

THURSDAY, FEBRUARY 9

FRIDAY, FEBRUARY 10

SATURDAY, FEBRUARY 11

SUNDAY, FEBRUARY 12

MONDAY, FEBRUARY 13

TUESDAY, FEBRUARY 14

WEDNESDAY, FEBRUARY 15

THURSDAY, FEBRUARY 16

FRIDAY, FEBRUARY 17

SATURDAY, FEBRUARY 18

SUNDAY, FEBRUARY 19

MONDAY, FEBRUARY 20

TUESDAY, FEBRUARY 21

WEDNESDAY, FEBRUARY 22

THURSDAY, FEBRUARY 23

FRIDAY, FEBRUARY 24

4. Circle what time you will be free on the day that you will talk with me.

	TIME									
MORNING	8 <sup>30</sup>	9	9 <sup>30</sup>	10	10 <sup>30</sup>	11	11 <sup>30</sup>	12		
AFTERNOON	12 <sup>30</sup>	1	1 <sup>30</sup>	2	2 <sup>30</sup>	3	3 <sup>30</sup>	4	4 <sup>30</sup>	5
EVENING	5 <sup>30</sup>	6	6 <sup>30</sup>	7	7 <sup>30</sup>	8				

We will phone you the day before your interview to give you the room number that your building manager has assigned for our meeting. If you have any questions you can call me after February 5 at 922-7083.

Please take this form to your building manager before Thursday, February 2.

Your time and help is greatly appreciated. Thank you for helping me help you and other senior citizens.

Sincerely,

*Beverly C. Peoples R.N.M.S.*

Beverly C. Peoples, R.N.M.S.  
Iowa State University

XIII. APPENDIX D. CONFIDENTIALITY PLEDGE AND CONTRACT

CONFIDENTIALITY PLEDGE

I recognize the importance of maintaining confidentiality of data collected from all persons interviewed in this study. I realize that to protect the privacy of persons involved, the discussion of information gathered during our interview is strictly forbidden and any information which identifies a specific respondent should not be discussed with anyone other than project staff. All information to be released through this project shall be reviewed and approved by the Project Director and staff.

I pledge to maintain the confidentiality of all information revealed to me.

I also will complete all of the interviews assigned to me by February 24, 1984. (If I do not complete them I will only be paid for those interviews that were completed.) Pay will be disbursed on February 25, 1984 after completion of the interviews.

I also am responsible for my own transportation to and from the interviews.

---

Interviewer

---

Date



XIV. APPENDIX E. INTERVIEWER TRAINING MANUAL

A STUDY OF INDEPENDENT  
BLACK ELDERLY PERSONS AND THEIR INFORMAL  
SOCIAL SUPPORT SYSTEM

Interviewer Manual

Iowa State University  
Professional Studies  
Higher Education  
February 1984

## TABLE OF CONTENTS

	Page
I. PURPOSE OF THE PROJECT . . . . .	
II. YOUR RESPONSIBILITIES . . . . .	
III. PRINCIPLES AND PROCEDURES OF INTERVIEWING . . . . .	
1. General . . . . .	
2. Interviewer Preparation . . . . .	
3. Initial Contact and Introduction . . . . .	
4. The Interviewing Process . . . . .	
5. Appearance and Dress . . . . .	
6. Asking the Questions . . . . .	
7. Questions Misunderstood . . . . .	
8. Probing . . . . .	
9. "I Don't Know" Answers . . . . .	
10. Recording the Responses . . . . .	
11. Closing the Interview . . . . .	
IV. CARRYING OUT YOUR ASSIGNMENT . . . . .	
1. Confirmation of Appointments . . . . .	
2. Arrival at the Facility . . . . .	
3. Introductory Remarks . . . . .	
4. Rules of Interviewing . . . . .	
5. Planning your Work . . . . .	
V. DEFINITIONS . . . . .	
VI. THE INTERVIEW SCHEDULE . . . . .	
VII. CONFIDENTIALITY PLEDGE . . . . .	

## I. PURPOSE OF THE STUDY

The purpose of the study is to identify the persons that independent black elderly get help from when they need it. This information can be used by gerontologists to help improve the quality of their lives.

## II. YOUR RESPONSIBILITIES

You are a representative of . Iowa State University for the duration of the survey. As such, one of your responsibilities is to maintain good will from the beginning to the end of the interviewing.

The success of this study largely depends upon your work in obtaining the information asked for in the questionnaire. It is of little value to subject the data to a sophisticated analysis if the data have not been carefully obtained. It is important that each household in your assignment is contacted and the questionnaire completely and accurately filled out if the household is eligible.

The preparation of the questionnaire and the instructions involved many hours of work. In general, the desired responses can be obtained by asking the questions as written. You may, however, encounter difficult situations. We hope that your knowledge of the purposes of the study and of the questionnaire as a whole will enable you to deal with these situations. In cases of difficulty, however, list the details of the situation on the questionnaire.

## III. PRINCIPLES AND PROCEDURES OF INTERVIEWING

### 1. General

To aid you in effectively carrying out your responsibility, this section discusses various aspects of the "art of interviewing" and attempts to make you aware of the various problems that may arise. Although interviewing may be easier for some than for others, all interviewers can improve their technique by learning to avoid certain types of problems, by being alert and perceptive.

Your primary objectives in the interviews are:

- (a) To accurately obtain all information asked for in the questionnaire;  
and
- (b) To legibly record this information as fully as possible.

You should strive for efficiency in your work. The survey materials should be well organized for the work, adequate notes should be kept on scheduled appointments, and your assignments should be planned to increase the effectiveness of your work. You should attempt to achieve complete coverage of your interview assignments and to minimize the number of refusals.

## 2. Interviewer Preparation

Before you actually conduct your first interview, you should understand and be aware of the objectives of the survey and what it attempts to accomplish. Be familiar with the field procedure and especially how these procedures apply to the interview. The interviewer training session is designed to aid you in understanding these objectives and procedures.

It is most important that you know the questionnaire. During the training session, each question will be discussed thoroughly. However, you should spend additional time in reading and reviewing the questionnaire and this manual before beginning to interview. Study each question until you know exactly what it means and what type of response it should elicit. You should practice by actually reading the questions aloud so that you will be able to use the questionnaire in an informal easy-going manner without appearing to read the questions too closely. This will help you conduct the interview in such a way that the respondent is less apt to feel he is being tested or investigated.

## 3. Initial Contact and Introduction

The initial contact with the respondent must be well planned and carried out if maximum cooperation is to be obtained. When arriving at the respondent's home you should use the same approach that the resident or a neighbor would use. Introduce yourself to the person and state your connection with Iowa State University.

The specific details of this introduction are given in Section VII.

Aside from being courteous, the introduction should dispel any suspicion that you are a saleslady.

Generally, you must anticipate the respondent's questions regarding the interview and be ready to counter possible objections effectively. Remember that most people will be very cordial and will readily agree to the interview. You should attempt to make the respondent feel that the information which he can furnish is very important to the overall study and that his cooperation will be a service to Iowa State University.

If the respondent is curious about how he was selected, explain to him that a random selection of ~~APARTMENT BUILDINGS~~ <sup>APARTMENT BUILDINGS</sup> was made. We are talking with the households within those. Assure him that all information he gives will be held in strict confidence and that it will be combined with that of other respondents.

If a respondent protests that his or her answers would not be typical or that he doesn't know enough about surveys, explain that it is necessary to talk to many different people for the results of the study to be satisfactory.

In most cases when either the male or female in an eligible home is there when you call, it will be possible to interview him/her immediately.

In some cases neither will be available or will be too busy to be interviewed. You should try to make sure the respondent is really too busy and not just making excuses to avoid giving the interview. If you are convinced the respondent is trying to put you off, try explaining the study in such a way as to stimulate his interest. It is best to get the interview on the first visit if possible. Don't suggest coming back until it is obvious that the interview at this time is impossible or impractical.

In some cases, the person who comes to the door will not be the person you are to interview. You will need to establish friendly relations with whomever answers the door so that you will have his or her cooperation in contacting the respondent. If another person answers the door you should explain the purpose of your visit immediately. This introduction is quite important. If a bad impression is given this person you may not receive the cooperation necessary to obtain your interview.

#### 4. The Interviewing Process

In order to elicit cooperation for, and during, the interview, you must attempt to establish "rapport" with the respondent. "Rapport" is a term designating a personal relationship of friendliness, warmth and trust. A state of rapport exists between you and the respondent when the respondent has accepted the purpose of the interview and actively seeks to assist you in obtaining the information to fulfill this purpose. Although a well-prepared introduction will begin to establish rapport, some type of conversational topic, of interest to the respondent, may help to relax tensions and lead to a good interview.

It is a good policy to interview a person privately if at all possible. If you ask questions in the presence of others, the respondent's answers may be influenced by the fact that others are listening. Obviously, your control over this is somewhat limited. It is permissible and desirable, however, to suggest to the respondent that the interview be taken in private.

The respondent should be made to feel as relaxed as possible during the interview. You should never indicate, either verbally or by your expressions, approval or disapproval of answers given by the respondent. Generally, you should neutrally accept and record the respondent's answers. This is particularly true of the questions concerning opinions or attitudes. However, in some situations it would be appropriate to ask for clarification or amplification of the respondent's answers (see the section on "probing," ).

Occasionally during the interview a particular question may break rapport

because it causes embarrassment or because the respondent cannot, or does not wish to, answer it. It is often wise at such points to break away from the interview schedule and discuss something off the subject so that the respondent will have time to regain composure and to be reassured about the interview. It is important, however, that such topics be outside the scope of the questionnaire so that nothing you say will influence the respondents answers in the rest of the interview.

A word of warning is in order at this point. Efforts to obtain a friendly relationship with the respondent can be overdone. A certain degree of formality and social detachment in the interview is desirable. A respondent should not be so concerned about your opinion of him that he will tend to slant his responses for the "best effect."

If valid and complete information is to be obtained, you must be perceptive as to the respondent's mood and reactions during the interviewing process. Try to establish a "comfortable" pace in completing the questionnaire. If the respondent seems to be having trouble answering, it may be wise to slow down the pace of the interview. Never give the respondent the impression that you are in a hurry to get through with him so that you can move on to the next respondent. You should learn to be a good listener and to give the impression that the respondent's answers are important.

#### 5. Appearance and Dress

The first impression you make on the respondent is largely by your personal appearance. Since a favorable impression can begin to establish rapport, you should give careful attention to your dress and appearance. Extremes in dress and personal appearance should be avoided. It is hoped that this reminder will not result in a serious suppression of your personality and individuality but will enable you to do your job well and obtain the best possible information.

**ALWAYS WEAR YOUR NAME TAGS**

#### 6. Asking the Questions

In addition to a thorough knowledge of the questionnaire, there are a few rules which must be observed in its administration. Consistency and strict adherence to these rules will result in accurate and reliable data.

Ask the questions precisely as specified. Rewording or rephrasing of questions to suit yourself must be avoided. If you feel that certain questions do not seem "comfortable," or that they seem difficult to ask, practice by reading them aloud until they do feel natural.

Ask the questions in order. It is important to ask the questions in the sequence given in the questionnaire. This sequence provides good continuity, from question to question and will facilitate your task. A particular response to a question may indicate that some of the following questions are skipped. These "skip" instructions should be closely observed to ensure that the required information is obtained.

Ask all the questions. With the exception of questions to be skipped when particular responses are given, all questions should be asked. Do not decide what a respondent's response to a question "should be," or "would be" from his answers to other questions.

## 7. Questions Misunderstood

When a question is not understood by the respondent it should be repeated exactly as stated in the questionnaire. Do not paraphrase the question in an effort to make it more understandable to the respondent. It seldom happens that two interviewers would paraphrase or interpret a question in exactly the same manner, and it is easy to understand how this could easily destroy the validity and accuracy of the survey. Often, if you simply say, "Let me read that question again," and then reread the question a little slower and a little more distinctly, the difficulty will be overcome.

## 8. Probing

To obtain the desired information in this survey, probing may often be required. A probe is anything the interviewer says to get the respondent to add to or explain what he has said or to direct his attention back to the subject when he has strayed from the question. Only general rules and comments on probing are given here; more specific comments are made in the discussion of the questionnaire.

In general, you should probe whenever the respondent's answer to a question is vague or incomplete, seems to be based on a misunderstanding of the question, or conflicts with previous answers. There are good probes and poor probes. A good probe is one that gently encourages the respondent to amplify or explain a remark without in any way suggesting an answer or line of thinking to him. We briefly discuss probing by considering 4 techniques:

(1) Encouraging the respondent to talk: One effective way of probing is the use of devices to encourage the respondent to talk once he has made a brief response to a question. Two devices that are particularly useful are

(a) An expectant pause on the part of the interviewer. The interview should be a casual situation in which the respondent has time to think things over without feeling that he must snap back with an answer. On some of the questions, he may not have well-formulated opinions and may have to think some before answering. An expectant pause is often sufficient to convey the impression that the respondent has merely begun answering the question, and to invite him to amplify on the topic.

(b) Acknowledging statements, such as "Yes" or "I see," by the interviewer are often sufficient to encourage the respondent to "tell more." You should never argue, debate or show disapproval of anything that the respondent says.

(2) Restating the question: This is often useful in probing. It gives the respondent more time to think and allows him a second chance to hear the question correctly.

(3) Asking neutral questions: The most frequently used method of probing is the use of "neutral" questions. Examples are "What do you have in mind?", "How is that?", "How do you mean?" These questions are useful for getting the respondent to elaborate on a statement or idea and to get him to explain something he has said.



(4) Making reassuring statements: Sometimes an adequate answer is obtained by reassuring the respondent of his ability to answer. Some respondents hesitate to answer because they are conscious of their lack of information on the topic or because they have difficulty in expressing their ideas. Something like, "From what you do know about it, what do you think of ....?" , may be sufficient to encourage these respondents to give adequate answers.

In order to probe effectively, you must know the intent of the questions. The open-end questions in the questionnaire may often require probing to obtain satisfactory responses. A one or two word answer to one of these questions is generally unsatisfactory and indicates the need for probing. More than one probe may be required to obtain a satisfactory response.

For questions in which the respondent is asked to give a list of names, you should automatically ask something like "Were there any others?" or "Can you think of any others?"

If, in a given situation, you think probing would antagonize the respondent, don't do it. If you think the response is in error, or if it conflicts with other information, note this on the questionnaire later when reviewing your work and explain that you did not feel that you could pursue the matter with the respondent.

NOTE: When you probe indicate that you have done so by writing the probe in parenthesis and then writing the additional response.

#### 9. "I Don't Know" Answers

Some respondents may try to avoid answering a question by simply saying, "I don't know." You should not be too quick to accept this answer. "I don't know" answers may indicate one of the following situations:

- (a) The respondent doesn't understand the question, and doesn't want to say so.
- (b) The respondent is thinking over the question, and is stalling for more time to think.
- (c) The respondent may be trying to avoid answering sensitive questions.
- (d) The respondent may actually not know.

By tactful use of probing questions you may be able to determine if a "don't know" answer is the correct response from the respondent or you may be able to obtain the "correct" answer. It is your responsibility to ascertain, as far as possible, that this is, in fact, the case.

## 10. Recording the Responses

It is very important that you accurately record the respondent's responses. Make sure you circle the correct answer. Do not make the circle so large that it encloses two answers. For example:

1.	yes	
2.	no	Incorrect
(1)	yes	
2.	no	Correct

This is very important because inaccurate information will hurt the results of the study. You should face the respondent when reading the questions. Also, before starting the interview, try to find a place where you can lay your materials on a flat and firm surface so that you will be better able to record the answers conveniently. If possible, try to line up the questionnaire (interview schedule) and the respondent in the same line of vision so that you can take each one into your vision without moving your head or body to any great extent.

Do not summarize what the respondent tells you. Write what he/she tells you. If you run out of space continue the answer on the back of the page and number it.

## 11. Closing the Interview

After the questioning phase of the interview has been completed, the questionnaire should be reviewed briefly in the presence of the respondent to make certain that all required information has been obtained and recorded.

You should thank the respondent for his cooperation and participation in the interview. Make every attempt to close on a pleasant note and make the respondent feel that the interview has been a useful experience. However, do not prolong unnecessarily your closing conversation. This is an unproductive use of your time. Furthermore, there is a tendency for respondents to remember only how long the entire visit took and to forget how much of the time was spent in irrelevant conversation often at their own instigation. Their attitude toward surveys and the university may, thus, be adversely affected.

Location and Address of the Apartment Buildings

You will be assigned to one or two buildings. A total of three buildings will be included in the study. They include

- |  |   |   |
|--|---|---|
| <ol style="list-style-type: none"> <li>1. Bellemaison East<br/>8330 E. Jefferson<br/>Detroit, Mich. 48214<br/><u>Manager</u>: Deborah Bachelor<br/>Tel. Number 331-7780</li> <li>2. River Towers Apartments<br/>7800 E. Jefferson<br/><u>Manager</u>: Yvonne Rachel<br/>Tel. Number 824-2245</li> <li>3. Himelhoch Apartments<br/>1545 Woodward<br/><u>Manager</u>: Shirley Alexander<br/>Tel. Number</li> </ol> | } | <p>Located near<br/>the "Lady"</p> <p>(Downtown across from<br/>the Trolley Apartments)</p> |
|--|---|---|

If you have any problems, please contact me (Beverly) at 922-7083.

## Carrying Out Your Assignment

1. Confirmation of Appointments

I will distribute a list of names of people with days and times they wish to be interviewed. It is your responsibility to phone them the day before the interview and tell them where to meet you and at what time. If changes have to be made in the appointments please notify the respondents and me. You are responsible for interviewing all the persons on your list.

If you are at the building and have extra time or have a day where no one requested an appointment then you can look at your assigned list of people and go knock on their apartment door and invite them downstairs to the office for an interview. But only interview those persons assigned to you.

## 2. Arrival at the Facility

Upon arrival find a convenient parking spot. I will give you more detailed information concerning this at the training meeting. Ring the doorbell and ask to see the manager. Show her your letter of introduction and ask her where the assigned interviewing room is located. You should ask if there is some way you can notify the respondents that you are here.

## 3. Introductory Remarks

There are two parts to the introduction -- stating your name and telling the purpose of your visit. You will also have a letter of introduction from Dr. Don G. Charles, Psychology Department, which you may show to the respondent when there seems to be some doubt in the respondent's mind about whom you represent.

The first page of the interview schedule (the questionnaire) has a three-paragraph introduction that you must read. Please practice reading this.

#### 4. Rules of interviewing

In order for the information collected to be accurate and to reflect the respondent's true attitudes and opinions, it is very important that you follow the basic rules of interviewing. These may be summarized as follows:

- (a) Ask questions as worded - Ask all questions exactly as they appear on the questionnaire. If you rephrase a question in your own words, it is unlikely that it will carry the exact meaning as the wording used on the questionnaire.
- (b) Ask questions in order - The sequence of questions has been carefully planned, and you should not change this sequence.
- (c) Never ask leading questions - This rule is closely related to Rule (a), "ask questions as worded." A leading question is simply one which "suggests" a particular answer from a respondent.
- (d) Never rush the respondent - The interviewer should establish a "comfortable" pace of the interview. Never give the respondent the idea that you are in a hurry to get through with him (her) so you can move on to the next household. Always give him (her) adequate time to think. If you rush, the end result of the interview will be far different than if you take your time.
- (e) Record responses verbatim - Many of the questions require only that you indicate which of several responses the interviewee chooses. However, for certain questions, the respondent will express himself in his own words. Write down exactly what the respondent tells you. Do not try to summarize his statement or put words in his mouth. After the respondent answers, do not paraphrase his statement or say - "Oh, you mean so and so." -  
Write down exactly what the respondent tells you.  
Please do not abbreviate any more than absolutely necessary in order to keep up.

#### 4. Planning your work

Since there may be instances in which a respondent is not available at the first call, you will need to keep careful records and be diligent in making and keeping appointments. It will require careful planning on your part to schedule your work efficiently so that:

- (1) You do not waste a lot of time and expense flitting from one segment to another and back again.
- (2) You do not get more things going than you can keep track of.
- (3) You are able to work steadily and efficiently.
- (4) You complete your assignments.

Definitions

Distant male relative - A male cousin, nephew, uncle or any other relative not listed.

Distant female relative - A female cousin, niece, aunt or any other relative not listed.

Interviewer - The person who administers the questionnaire, asking all the applicable questions and recording the answers in the space allotted therefor.

Interview schedule - It is the questionnaire to be administered to the respondent and on which the responses are recorded.

Not applicable - This phrase means "does not apply."

Respondent - (Interviewee) - The person who responds to the questions.

THE QUESTIONNAIREGeneral Instructions

Read each question clearly and in a moderate tone. (Some will be read louder than others because some of the people are hard of hearing.) Read the instructions for each section very carefully. Do not make circles so large that they enclose two answers.

Cover Page

1. Write your name on line one.
2. Write down the starting time, ex.:   8   :  20   
(Use a.m. or p.m. after the time to indicate morning, afternoon or evening.)
3. Place the respondent's I.D. number here. You will be given a list of people (respondents) you are to interview and besides their names will be an I.D. number, apartment number and phone number. Record only the three-digit I.D. number here, ex.:  
Respondent's I.D.:  201
4. Circle the respondent's sex.
5. The next three paragraphs must be read exactly as they are printed.  
DO NOT SKIP THESE PARAGRAPHS!! Insert your name after: My name is \_\_\_\_\_ . This is your introduction.

- Read the instructions to yourself not out loud.
  - When you see the phrase NO RESPONSE, do not read it out loud.
  - This first set of questions will give us general information about the respondent's characteristics. Each question is read out loud and the responses are also read out loud to the respondent unless otherwise indicated.
  - Read each question to the respondent. Circle one answer only, unless otherwise indicated. If they give an answer that is not listed circle "other" and write down their answer.
  - When you see ..., it means read the question and responses out loud.
  - Use probing techniques for clarifying answers. Also re-read the question if the respondent says "I don't know," or if the respondent is unsure of the question or answer.
- Q1. Record the state or foreign country. Do not need the city.
  - Q2. Record their age in years. Ex.: 65
  - Q3. Here you want to find out their marital status. If a man and woman are not married but have been living together for more than five years or have a common law marriage, then circle married.  
Read all of the responses except 7 & 9.
  - Q4. Read the question, not the responses, and wait for the person (respondent) to answer, then circle the answer. When their answer is: ex. 5-1/2 years, then circle 4 because 5-1/2 years is between 5 and 8 years and is therefore rounded off to the next largest number.
  - Q5. Read the question and all the responses. For response 3 say "OR were there other reasons why you moved to Detroit?" Circle the correct response or write it in the space provided.



- Q6. Read the questions but not the responses. Here we are interested in the highest level of education the respondent has received. If they received a GED then circle 05 because a GED is equivalent to a high school diploma.
- Q7. Read the question and the responses 1-7.
- Q8. Read the question and wait for the response. Round off to the next largest number. Ex. 2-1/2 years, circle response 4.
- Q9. Read the question and the words "your or your spouse's retirement." Then, read the responses 1 and 2 ONLY.
- Q10. Read the question and all the responses except 5 and 9. The respondent can give more than one answer.
- Q11. Read the question and wait for the respondent to answer. This question refers to natural children, adopted children, and stepchildren not foster children. If they have no living children or never had children then go directly to Q13A and skip Q12A - Q12D.
- Q12A - Q12D. The interest here is the collection of more information about the respondent's children. The Detroit area is defined as being no more than a one hour's distance drive by car from the respondent's residence.
- Q12C. Just place a number here which tell show many of their children live in other states or countries.
- Q12D. List the states or countries in which their children live.
- Q13A. Read the question. Circle the answer. If they answer NO, circle 2, then go to Q14A and read the sentence before it beginning with "Now, I am ...."

- Q13B. Read the question and wait for the answer and circle it. If they say, for example: "SARAH," use a probing technique to find out who Sarah is and what she is to them. Distant relatives are relatives other than those listed.
- Q14A. Be sure to read the sentence before this question. Read the question. Circle the answer. If the answer is 2 or 3 then go to Q15. If the answer is 1 go to 14B.
- Q14B. Find out who the person is but do not read the responses. Wait for the person to answer the question. If they say brother or sister-in-law, then circle brother or sister.
- Q15. Read the question and all of the responses except 9.
- Q16A. Read the question and the examples which are in parentheses, then wait for the answer and circle it. If the answer was NO, then go to Q17.
- Q16B. Read the question and wait for the answer.
- Q17A - Q19B. Read the question, circle the answer and follow instructions. Probe when needed.
- Q20. Here you want to find out where they get most of their meals, not all of their meals. Stress the word most. Follow the instructions.
- Q21. Read the question and wait for the answer. Probe when necessary.
- Q22A - Q22B. Read the question, wait for the answer and probe when necessary.
- Q23A - Q23B. Here you want to find out if someone sends them money on a regular basis. Ex. once a month, once a week, every other month, etc. In other words, the respondent looks forward to receiving money at a specified time period.

- Q24A - Q34. Are hypothetical questions and maybe they have not experienced these situations, but find out what they would do if they were faced with these situations.
- Q35. Read the question and the responses 1 and 2.
- Q36. Hand card 1 to the respondent. Read question 36, then read a-d and each time read the possible responses which are strongly agree, agree, not sure, disagree and strongly disagree. Circle the number in the box that corresponds with the respondent's answer. The respondent has a card with the answers on it but you still need to read them.
- Q37 - Q41. Are opinion questions. Read each question and the responses.
- Q42. Read the question, wait for the answer and circle it.
- Q43. Hand card 2 to the respondent. Read the "For the next .... Then, read the question and the possible answers which are: at least once a day, at least once a week, at least once a month, several times a year, once a year and never.
- Q44. Find out who (one answer only) is the most helpful most of the time.
- Read the next question and get their mailing address.
- Read the thank you phrase.
- Write down the time the interview ends, ex.:       :       p.m.
- Write down the total number of minutes that the interview session took.
- Now rate how well you think the interview session went.
- If it went fair or poor explain why. Do not explain if the interview session was 5, 4 or 3.

XV. APPENDIX F. LETTER OF INTRODUCTION

IOWA STATE  
UNIVERSITY

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Department of Psychology  
Ames, Iowa 50011  
Telephone 515 294 1742

January, 1984

To Whom it May Concern:

The bearer of this letter is engaged in gathering information for a research study. The research has been planned with and is approved by members of the Graduate Faculty of Iowa State University. The information will be used in a doctoral dissertation at this university.

Your help and cooperation would be appreciated.

*Don C. Charles*

Don C. Charles  
Professor  
Member, Graduate Faculty

## XVI. APPENDIX G. TABLES

Table G1. Primary group assuming responsibility for the respondents while in the hospital by sex of respondent

Primary group	Sex	
	Male	Female
Close relatives	34 (72%)	57 (66%)
Nonrelatives	5 (11%)	13 (15%)
Distant relatives	8 (17%)	16 (19%)
$\chi^2 = 0.8163$	alpha = .05	2 df = 5.9914

Table G2. Primary groups that accompany the elderly when cashing checks by respondents' sex

Primary group	Sex	
	Male	Female
Relatives	9 (53%)	21 (49%)
Nonrelatives	8 (47%)	22 (51%)
$\chi^2 = .6605$	alpha = .05	1 df = 3.8414

Table G3. Primary groups that assist the respondents when they are sick in bed by respondents' sex

Primary groups	Sex	
	Male	Female
Relatives	32 (73%)	49 (62%)
Nonrelatives	12 (27%)	30 (38%)
$\chi^2 = 1.5347$	alpha = .05	1 df = 3.8414

Table G4. Primary groups that talk to the nurses when the respondents are in the hospital by respondents' sex

Primary groups	Sex	
	Male	Female
Relatives	33 (79%)	55 (71%)
Nonrelatives	9 (21%)	22 (29%)
$\chi^2 = 0.7349$	alpha = .05	1 df = 3.8414

Table G5. Primary groups that the respondent talks to when they are upset by respondent's sex

Primary group	Sex	
	Male	Female
Relatives	18 (50%)	21 (27%)
Nonrelatives	8 (22%)	25 (33%)
God	10 (28%)	31 (40%)
$\chi^2 = 5.6064$	alpha = .05	2 df = 5.9914

Table G6. Primary groups that the respondents talk to when upset by respondent's marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	14 (58%)	18 (32%)	7 (22%)
Nonrelatives	3 (13%)	18 (32%)	12 (38%)
God	7 (29%)	21 (37%)	13 (41%)
$\chi^2 = 9.2321$	alpha = .05	4 df = 9.4877	



Table G7. Primary groups that assist the respondents fix malfunctioning small items present in their apartment by respondent's sex

Primary group	Sex	
	Male	Female
Relatives	3 (13%)	17 (26%)
Nonrelatives	5 (21%)	9 (14%)
Paid help	16 (67%)	39 (60%)
$\chi^2 = 2.1242$	alpha = .05	2 df = 5.9914

Table G8. Primary groups that assist the respondents fix malfunctioning small items present in their apartment by respondent's marital status

Primary group	Marital status		
	Married	Widowed	Single
Relatives	3 (30%)	13 (25%)	4 (15%)
Nonrelatives	0 (0%)	11 (21%)	3 (12%)
Paid help	7 (70%)	29 (55%)	19 (73%)
$\chi^2 = 4.7212$	alpha = 0.3171		4 df = 9.4877

Table G9. Primary groups that assist the respondents store articles by respondent's sex

Primary group	Sex	
	Male	Female
Relatives	17 (68%)	27 (63%)
Nonrelatives	8 (32%)	16 (37%)
$\chi^2 = 0.1910$	alpha = .05	1 df = 3.8414

Table G10. Primary groups that assist the respondent store articles by respondent's marital status

Primary groups	Marital status		
	Married	Widowed	Single
Relatives	12 (86%)	24 (65%)	8 (47%)
Nonrelatives	2 (15%)	13 (35%)	9 (53%)
$\chi^2 = 9.0455$	alpha = .05		2 df = 5.9914

Table G11. Primary groups that respondents borrow nonmonetary items from by sex of respondent

Primary group	Sex	
	Male	Female
Relatives	2 (6%)	4 (6%)
Nonrelatives	32 (94%)	64 (94%)
$\chi^2 = 0.0$	alpha = .05	1 df = 3.8414

Table G12. Importance of keeping in touch with family by respondent's sex

Importance	Sex	
	Male	Female
Very important	45 (90%)	70 (79%)
Important	5 (10%)	19 (21%)
$\chi^2$	alpha = .05	1 df = 3.8414

Table G13. Primary groups that accompany the respondents to church by respondent's sex

Primary group	Sex	
	Female	Male
Relatives	19 (50%)	23 (30%)
Nonrelatives	19 (50%)	53 (70%)
$\chi^2 = 5.15115$	alpha = .05	1 df = 3.8414

Table G14. Respondent's opinions about the importance of filial responsibility during the illness of their parents by the educational status of the respondent

Feelings	Educational status			
	Below 7th grade	7-9th grade	High school	Beyond h.s.
Strongly agree	4 (13%)	7 (13%)	1 (3%)	2 (11%)
Agree	24 (75%)	39 (71%)	18 (56%)	9 (47%)
Not sure	1 (3%)	3 (6%)	6 (19%)	3 (16%)
Disagree	3 (9%)	4 (7%)	7 (22%)	4 (22%)
Strongly disagree	0 (0%)	2 (4%)	1 (5%)	0 (0%)
$\chi^2 = 17.5473$	alpha = .05		9 df = 21.0261	

Table G15. Respondents' opinions on adult children giving their parents financial help by respondents' educational status

Opinion	Educational status			
	Below 7th grade	7-9th grade	High school	Beyond h.s.
Strongly agree	1 (3%)	3 (5%)	0 (0%)	0 (0%)
Agree	23 (72%)	27 (48%)	15 (48%)	8 (40%)
Not sure	2 (6%)	9 (16%)	6 (19%)	5 (25%)
Disagree	6 (19%)	13 (23%)	9 (29%)	7 (35%)
Strongly disagree	0 (0%)	4 (7%)	1 (3%)	0 (0%)
$\chi^2 = 14.4120$				
alpha = .05				
12 df = 21.0261				

Table G16. Respondents' opinion about sons' and daughters' provision of help to their parents by respondents' educational status

Opinion	Educational status			
	Below 7th grade	7-9th grade	High school	Beyond h.s.
Daughters different	13 (45%)	23 (45%)	13 (45%)	13 (77%)
Daughters and son same	14 (48%)	23 (45%)	16 (55%)	3 (18%)
No opinion	2 (7%)	5 (10%)	0 (0%)	0 (0%)
$\chi^2 = 9.3869$				
alpha = .05				
6 df = 12.5916				

Table G17. Frequency of interaction with specific primary groups

Activity	Sample size	Once a day	Once a week	Once a month	Several times a year	Once a year	Never	Not applicable	Do not know
See child	140	27 (19%)	43 (31%)	18 (13%)	4 (3%)	7 (5%)	4 (3%)	36 (25%)	1 (1%)
Child writes	140	2 (1%)	5 (3%)	12 (8%)	8 (6%)	3 (2%)	71 (50%)	39 (30%)	0 (0%)
Talk to neighbor	140	96 (69%)	30 (21%)	8 (6%)	1 (1%)	2 (1%)	3 (2%)	0 (0%)	0 (0%)
Talk to relatives on the phone	140	34 (25%)	57 (41%)	28 (20%)	11 (8%)	3 (2%)	2 (1%)	3 (2%)	2 (1%)
Relatives visit	140	18 (13%)	42 (30%)	29 (21%)	20 (14%)	15 (11%)	10 (7%)	4 (3%)	2 (1%)
Relatives write	140	3 (2%)	4 (3%)	26 (19%)	26 (19%)	24 (17%)	51 (37%)	2 (1%)	4 (2%)
Talk to friend on the phone	136	73 (54%)	34 (25%)	20 (15%)	3 (2%)	2 (1%)	3 (2%)	0 (0%)	1 (1%)
Friends visit	140	51 (36%)	51 (36%)	25 (18%)	5 (4%)	4 (3%)	1 (1%)	2 (1%)	1 (1%)
Friends write	140	1 (1%)	7 (5%)	17 (12%)	22 (16%)	19 (13%)	70 (50%)	3 (2%)	1 (1%)
Talk to child on the phone	140	56 (40%)	32 (23%)	8 (6%)	3 (2%)	2 (1%)	3 (2%)	36 (26%)	0 (0%)