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**Steele, Wendy Levitt, D.S.W.**

**City University of New York, 1988**

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FRIENDSHIP, AN EXCHANGE THEORY APPROACH TO AGEING

by

WENDY L. STEELE

A dissertation submitted to the Graduate Faculty  
in Social Work in partial fulfillment of the  
requirements for the degree of Doctor of Social  
Welfare, The City University of New York.

1988

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## Abstract

## FRIENDSHIP, AN EXCHANGE THEORY APPROACH TO AGEING

by

WENDY L. STEELE

Adviser: Professor Michael Smith

Older people are often isolated from mainstream society due to health or circumstances of living. This isolation can contribute to mental health problems and physical deterioration which may lead to pre-mature placement in nursing homes or even hospitalization. The purpose of this project is to examine the benefits of a Friendly Visiting Program. This program, viewed from the perspective of mutuality and reciprocity, could reduce the isolation felt by elderly homebound participants. Analysis of the program is based on exchange theory which states that a relationship is most successful when each party feels benefited. The value of the exchange is determined by the recipient and can be either concrete or emotional. If an exchange is successful, that is, both parties satisfied, it will continue. An unrewarding relationship will either adapt to the needs of the partners or terminate. The exchange is not necessarily equal but rather a match of what each person wants to give of him/herself.

Pertinent theories on ageing are reviewed including disengagement, activity, role, developmental, symbolic interaction and balance theory. Their applicability for the elderly is examined and critiqued.

The study is an exploratory research project involving 25 older people and 21 volunteers who are participating in a Friendly Visiting Program under the direction of Project DOROT in New York, New York.

Elderly participants ranged in age from 60 to 94 with physical health and mobility rated most problematic. Mental health, hearing and sight were reported from fair to good by a majority of respondents.

Elderly and volunteer participants reported 100% that their friend cared about them. Over 88% of all participants shared their thoughts and feelings with each other, felt they had something to offer their friend, trusted each other, and felt that the relationship was mutually rewarding. Volunteers felt that they received friendship and a sense of helping others as well as an exchange between generations. Older people felt that friendship, caring and contact with other people were most important.

Friendships were based on mutuality and reciprocity thus supporting exchange theory as relevant to the field of ageing. A training manual was developed to assist agencies in training volunteers to foster mutuality with relationships.

### Acknowledgements

There are many people who helped me through the formulation and writing of a doctoral thesis. Some are on the faculty of Hunter School of Social Work and others helped me to live while I was engrossed in the process of writing.

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I would also like to thank Dean Harold Weissman for his encouragement in applying to the program and his support throughout.

I would like to extend my thanks and appreciation to the staff of Project DOROT, especially Sheila Hochman, for allowing me to observe their program and conduct my research. Their Friendly Visiting Program serves as an inspiration to those people interested in program planning and delivery.

Many thanks go to Charles Levitt, Jeanne Steele and David Wilber who helped me edit the final document.

My parents, Charles and Evelyn Levitt, must also be thanked for their commitment, both emotional and financial, to the institution of higher education.

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CHAPTER I  
SOCIAL POLICY OF THE AGEING

Introduction

Older people are often isolated from mainstream society due to health or circumstances of living. This isolation can contribute to mental health problems and physical deterioration which may lead to pre-mature placement in nursing homes or even hospitalization. The purpose of this project is to examine the benefits of a Friendly Visiting Program. This program, viewed from the perspective of mutuality and reciprocity, could reduce the isolation felt by elderly homebound participants. Analysis of the program is based on exchange theory which states that a relationship is most successful when each party feels benefited. The value of the exchange is determined by the recipient and can be either concrete or emotional. If an exchange is successful, that is, both parties satisfied, it will continue. An unrewarding relationship will either adapt to the needs of the partners or terminate. The exchange is not necessarily equal but rather a match of what each person wants to give of him/herself.

Literature supports the hypothesis that friendship is an important component in alleviating some of the emotional losses felt by many older people resulting from retirement,

ill health or loss of loved ones. The author finds that many older people are not able to initiate peer friendships due to lack of access to new people or inability to leave their homes to continue to see old friends. Friendship with a person of another generation can provide some of the same benefits of peer relationships without many of the existing drawbacks. Some problems encountered by peers include difficulty visiting each other due to illness or physical limitation of one or both people. The author sought to determine if intergenerational friendships could represent the essential components of exchange theory, mutuality and reciprocity, as a basis for a Friendly Visiting Program.

The research design utilized in this study was based upon an ex post facto interview with twenty-five older people and twenty-one visiting volunteers. The instrument was designed to measure self-perception on issues such as morale, self-esteem and mutuality. In addition questions were asked regarding concrete activities and topics of conversation in which the older people and their volunteers participated. Communication between partners were compared for compatibility and to determine if both parties felt that they were benefiting from the relationship, the primary basis for exchange theory.

### Social Policies for Support of the Aged

Developing services to the ageing presents a continuing challenge to the social work profession. Policies and programs must be formulated on the lesson of the past yet understood in the context of the present socio-economic atmosphere. Kleff says the following in his article "Beyond the Me Decade: Social Gerontology in the Eighties":

As we stand on the threshold of a new decade, we are faced with dramatic changes in the demography of the elderly population; in the political power of special interest groups; in the values of society; and in the economic realities of life in the United States. These changes will undoubtedly have profound effects on perceptions of old age and the elderly, their roles and functions, their needs and the service appropriate to meet those needs and to help them age successfully.\_1/

Kleff seems to be calling for a new outlook on ageing which will not only encompass economic and demographic realities but address the prevailing social realities of the day. Together these factors lead to a discussion of social policy and its relationship to the ageing.

Social policy of the ageing is predicated upon several hypotheses which reflect current values and have been arrived at through a historical process. These hypotheses' are conflictive in nature and are reflected in the social policies.

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1/ Ramsey Kleff, "Beyond the Me Generation: Social Gerontology in the Eighties", Journal of Social Issues, Vol.36. No.2 (1980), p. 153.

All modern societies are concerned with productivity, whether industrial or agrarian. Because older people, at the very least, have diminished physical capabilities, society may force them to alter their status. Depending on the role they held when younger, such alterations can result in problems of self esteem, worthiness, reduction of income and place in society.

Although views and belief about the elderly need to be examined in their historical context, it is also important to remember that the present pool of elderly is older and healthier than past generations due to improvements in nutrition, physical, and mental health. A realistic issue is the problem of the diminishing financial pie and the prevailing policy that provision of life sustaining services is sufficient and to provide life enhancing services is an unaffordable luxury. The social work profession is faced with the challenge of helping this new group of elderly within the present socio-economic climate.

Social policies aimed at implementing the well being of the elderly involve a variety of objectives including economics, physical health, housing, transportation, and nutrition as well as mental health. These policies contain implicit recognition of the importance of satisfying the basic needs of this population.

Social Security as a universal age entitlement and SSI as a need based program, have as their aims that the aged remain above the poverty level. Tax provisions and private retirement pensions also contribute toward the economic maintenance of the aged. Programs for the ageing assure basic health care through Medicaid (need-based) and Medicare (age-based). A related objective of these economic and health policies is to provide enough support so that families of the aged will not be burdened. Many communities provide special transportation programs and/or reduced fares as a compensation for the ills of ageing. The government has also supported nutrition programs through such services as Meals On Wheels and Federal Food Stamps. Housing for the elderly is a major objective with rent subsidy and stabilization programs, non-eviction plans, and retirement communities, all geared toward helping people maintain their homes or relocate to areas of high density elderly populations.

Service programs such as Vista, Foster Grandparents, Retired Senior Volunteer Program and Service Corps of Retired Executives attempt to change the power balance by allowing older people to continue contributing to society. RSVP and SCORE are programs which assist retired people in volunteering their services without compensation to public and nonprofit institutions. Vista and Foster Grandparents

provide a small stipend to volunteers who participate in specific community projects. Although these programs are valuable, they benefit only a small percentage of older people. They are also self-selective, since only the healthy, mobile elderly are able to participate.

#### Relevant Legislation

The Social Security Act of 1935 was the first federal legislation which provided old age assistance to the needy and old age benefits as a universal entitlement through Title II. In 1966 Title XVIII added health care of the elderly under Medicare. In 1972 Title XVI redirected responsibility for adult welfare from the states to the federal government. Title XX provided for the mental health of the ageing. The Social Service Block Grant superseded Title XX and gives the states more discretion in determining eligibility criteria.\_2/

The Older Americans Act of 1965 under the newly created Administration on Ageing, was legislated to provide a central focus and responsibility within the federal government on all matters of concern to older people. A major objective

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2/ Carole Austin and Martin B. Loeb, "Why Age is Relevant in Social Policy and Practice" in Age or Need, Public Policies for Older People, ed Bernice Neugarten (Beverly Hills: Sage Publications, 1982), p. 279.

of the OAA was to address the problem of fragmentation of service systems and to strengthen and assist state and local agencies concerned with the problems of ageing. These agencies were to fulfill this mandate in the following ways:

- 1) administer grants to states for planning, coordination and provision of community services,
- 2) administer grants to organizations, institutions and individuals for research and demonstration projects,
- 3) administer grants to public and non-profit private organizations for training,
- 4) provide a central clearinghouse of information on services and opportunities available to the elderly, and
- 5) provide program guidance and materials to professionals and lay leaders for use in conducting consumer education programs for the elderly.\_3/

Title II of the OAA instituted volunteer programs for senior citizens, Title III included all social services leading to the general welfare of older persons while Title IV addressed contributions toward the wholesome and meaningful living of older persons. The major criticism of the OAA

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3/ Douglas W. Nelson, "Alternative Images of Old Age". in Age or Need, Public Policies for Older People, ed. Bernice Neugarten (Beverly Hill: Sage Publications, 1982), p. 167.

was that it was more concerned with systems than direct services and provided a shift from individuals to service providers.\_4/

Another major piece of legislation impacting on the ageing was the 1963 Comprehensive Community Mental Health Centers Act which was mandated to find the causes of mental illness and improve facilities for early diagnosis and effective treatment.

Policies involving the mental health of the elderly address such issues as recreation, socialization, volunteer participation as well as direct treatment services through psychiatric clinics and mental health centers. Recently many social service agencies have experienced cutbacks both in funding and the imposition of more specific criteria for services offered. This has created a gap in services for many people previously eligible for casework services who do not now meet funding eligibility. It is important to examine new ways to deliver services which are less costly yet address the problems faced by older people. This project examines one such program.

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4/ Stephen Blum and Meredith Minkler, "Toward a Continuum of Caring Alternatives: Community Based Care for the Elderly", in Journal of Social Issues, (Vol:36, No.2, 1980), p. 145.

Social policies are responses to social problems. What a society labels as a problem is usually based on its value system. The experience of ageing has been greatly influenced by urbanization and modernization and its impact on the family, the marketplace, and the individual.

The major problems faced by the elderly in the United States are, in large measure, ones that are socially constructed as a result of our conceptions on the aging and the aged.\_5/

This country has always struggled with some basic value conflicts which are reflected in its social policies. The capitalistic system is based on individualism, competition and inequality of rights and resources. As a result, the country has developed some policies that result in the old being portrayed as unproductive human beings who should be maintained at the minimum level of existence and who must compete for services with other needy groups (need based programs). We have also developed policies that reflect the basic dignity of all people with values that stress cooperation and entitlement. Conflicts arise when economic conditions impose constraints on the public treasury. The conflict is exemplified in the degree of help the public should provide, between life sustaining and life enhancing policies. There is agreement that the elderly are deserving of certain benefits. The conflict is more pronounced when

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5/ Carroll L. Estes, The Aging Enterprise, (Washington: Jossey-Bass Publishers, 1980), p.1.

resources become scarce and funding sources diminish.

An additional problem with entitlement policies is that the elderly are systematically isolated from other groups. Separating the aged in policy and service delivery stigmatizes them as a cohort group. A person's own self perception can be changed if others view him/her negatively.

...[T]he labeling of social groups conditions the way others react to them...Since the labels and definitions applied to any group in society result from reciprocal relationships in which the relative power, class and social status of interactions play a part, the aged cannot unilaterally alter their relationship to the rest of society.\_6/

More contact with people of other generations could improve the way younger people view the older people and also enhance self-esteem among the elderly. Relationships which would foster meaningful interaction are one way to alter the power imbalance felt by many older people.

To a degree, social policies have affected the quality of life, circumstances of living and relationships among groups. As a group, the elderly are now living in better economic conditions with certain protections that were unavailable to them before the 1930's. Quality of life has been enhanced for those elderly who wish to take part in the volunteer programs described above. However, this

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6/ Ibid., p.227.

type of service appeals to only a segment of the older population. For others, the lack of adequate transportation, nutrition, health care, housing and other services impairs their ability to enjoy life. Still others are isolated and lonely due to lack of familial and peer contact.

#### Presenting Problem

Past policies reflect how the aged were viewed at a certain point in time. It is important to reexamine the characteristics of the population being studied in the context of the 1980's. As of the 1979 census, one out of every nine people was over age 65. The projection for 2020 is that one out of every six people will be over 65.\_7/ The most interesting data involves the over 75 population which proportionally is the fastest growing segment of the older population. In 1968 there were seven million three hundred thousand people over age 75 but by 1990 this number will increase to over ten million. The Census Bureau also projects that there will be approximately 3.7 million people over the age of 85 by the year 2000.\_8/ This has major implications for society. This population will claim a larger proportion of the federal budget entitlement programs,

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7/ Bernice L. Neugarten, "Older People: A Profile" in Age or Need, Public Policies for Older People, ed. Bernice L. Neugarten (Beverly Hills: Sage Publications, 1982), p. 33.

8/ Ibid., p.34.

health care, housing, nutrition and transportation programs. In addition this growing population will have the political power to require other programs to meet their needs. Program planning, design and evaluation is essential to future service delivery.

As of 1982, 95% of the elderly lived in the community compared to 5% of the elderly who lived in institutions.\_9/ Seventy-five percent of all men live in families and 20% live alone. Sixty percent of women over 65 live in families with 33% living alone. In 1968 there were six men to every ten women over the age of 75. Sixty percent of these men were married, compared to only 20% of the women. Although a need for services or a gap in services for this population cannot be assumed, this group of older people should be evaluated for unmet needs. According to Estes, 5 to 22% of the aged in the community have moderate to severe psychiatric problems but only about 3% are seen in outpatient psychiatric facilities.\_10/ Men and women living alone may not have the support systems needed to assist them in maintaining themselves in the community. If this group is at risk of premature placements in nursing homes and/or hospitals, preventive services to them may be cost effective.

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9/ Ibid., p.48.

10/ Carroll Estes, The Aging Enterprise, p.4.

As of the 1968-69 and 1976-77 census information, those 65 to 74 years of age had 30 days of restricted activity days and 11 days of bed disability days per year compared to the over 75 group with 40 bed restricted days and 17 bed disability days.<sup>11/</sup> This means that this population cannot be expected to be entirely self-sufficient and that some support services must be provided. Brotman says 87% of the population over 75 have chronic impairments and 14% of the population cannot carry out usual major activities. Two-thirds of the over 65 population live in urban areas and 95% are living in the community. Otherwise demographic information is similar to the country's general population. If 95% are living in the community, 20-33% are living alone and 7/8 have some chronic impairments, program planners should be alerted that this population requires additional services.

Lennie-Marie Tolliver of the Administration on Ageing states that as of the 1980 census, approximately 5% of today's older population require help due to mental or physical dysfunctioning. As the over 75 population increases, so will the need for community based care.<sup>12/</sup>

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11/ Herman B. Brotman, Who Are the Aged: A Demographic View, (University of Michigan-Wayne State University: Institute of Gerontology, 1968).

12/ Lennie-Marie Tolliver, "Social and Mental Health Needs of the Aged" in American Psychology, (March, 1983), p.316.

Neugarten reports that senility appears infrequently in people in their 60's and 70's but appears in approximately 20% of people over age 80. Short episodes of depression probably occur in the majority of older people.\_13/ Many of these people could continue to function in a community setting if they had the necessary social supports.

#### Unmet need

Many studies have been done on life satisfaction of the elderly. Lowenthal sees alienation as an aspect of mental illness. The five components of alienation are powerlessness, helplessness, social isolation, meaninglessness and self-estrangement. Weiss feels that severe disruption of social role can produce social isolation. Rosow says that "...the problems of old age are of two kinds: those that older people actually have and those that experts think they have".\_14/ He sees the social issues as relating to loneliness, isolation and alienation. Present social policy has indirectly contributed to some of these issues by segregating the aged, treating them as a separate group, seeing them as homogeneously needy

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13/ Bernice L. Neugarten, "Older People: A Profile" in Age or Need, Public Policies for Older People, ed. Bernice L. Neugarten (Beverly Hills: Sage Publications, 1982), p. 50.

14/ Irving Rosow, Social Integration of the Aged, (New York: The Free Press, 1967), p. 1.

and discriminating against them through mandatory retirement policies. This in turn causes role loss and a lowering of self-esteem which often affects elderly peer relationships and family functioning. Present policies may also contribute to intergenerational conflict by encouraging early retirement and competition.

The 1963 Comprehensive Community Mental Health Centers Act attempted to address some of these issues. Its purpose was to find the causes of mental illness and to improve the facilities for early diagnosis and effective treatment. Community centers would make possible a better understanding of the clients' needs and give a better atmosphere for treatment and recovery. However, this view suggests the individual as the primary problem.

When persons who are old, poor and stigmatized by society become objects of gerontological research, they are seen as problems to society, rather than as persons experiencing problems created by society.\_15/

For the past 30 years much of the research on the problems of the aged has focused on the individual and the adjustment of the individual to circumstances that for the most part were externally determined. We need to view mental illness as a reaction to a difficult adjustment

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rather than as a process of ageing.

...(The) need to adjust to a series of unbearable deprivations which so often confront the older person, produces problems of the first magnitude for the person himself, for his family and for the community.\_16/

Some of these deprivations are caused by changes in society which impact on family relationships. Due to technological changes, the skills and knowledge of the older people are less applicable to the young. Older women are seen as having less value as housekeeping skills are down played and women are more and more expected to participate in the market place. Children often leave home to be more independent, loosening family ties. Nuclear families often have to leave extended family in order to pursue jobs. Middle aged children may resent the emotional and financial burdens of elderly parents and, at the same time, may isolate them by being excessively protective of burdening their parents with their own problems. Children of the elderly may be facing retirement issues of their own, others still very involved with their careers. Trends toward adult children moving back with parents due to economic necessities often place middle aged people in a squeeze between caring for their elderly parents and their adult children. This can

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16/ Elizabeth Ann Kutza, The Benefits of Old Age, (Chicago: The University of Chicago Press, 1981), p. 15.

create a loosening of the traditional support systems of the elderly, causing old age to become a period filled with crises.

Despite all these problems, not all elderly have problems adjusting. According to Kutza:

the individual's reaction to change will also be affected by the extent to which it threatens his integrity and his ego, how much gratification is denied him, how it affects the image of himself, and most important of all, by the manner in which he was able to handle threatening changes in his earlier years.\_17/

However,

it is in mental health services that ageist attitudes seem to prevail. Not only is there general reluctance to finance mental health services for the population at large...but there is a widespread view that it is generally futile to invest in mental health services to the old....\_18/

In light of their growing number, it is important to continue to look for better and more cost efficient way to serve this population. Perhaps traditional mental health services have not addressed the problems faced by many elderly because they focus on the individual weakness of the person rather than the problems relating to circumstances of living.

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17/ Ibid., p. 15.

18/ Bernice L. Neugarten, "Older People: A Profile", p. 51.

### Problem Definition

One of the central issues in setting up a program to address the mental health needs of the ageing is how the problem is defined. Victim blaming diverts attention away from societal responsibility and ageism is used to excuse society from taking action. Does the problem lie with the individual who is deficient or with the way in which society views the individual? William Ryan in "Blaming the Victim" discusses programs which are instituted to help or change the individual. The problem is defined as the ageing person and therefore programs are designed to deal with that deficiency. Sydney Bernard in "Why Service Delivery Programs Fail" points out how social programs are instituted to meet social problems. This involves program administration, entitlements, regulations and monitoring. The emphasis becomes efficiency and cost rather than effectiveness of the program in addressing the social problem. Bernard feels that this is the result of social provisions being politically unpopular. Policy change is more related to ideology and values and is consequently more difficult to institute rather than programs which can be legislated incrementally.

According to Rittel and Webber in "Where Models Fail", the way of looking at problem solving is by problem definition. Defining the problem leads toward the solution.

According to the authors, the key problem in policy making and program design for mental health services for the ageing is the lack of social theory from which one can understand the problem. If the problem definition focuses on the individual, a residual social service approach will be utilized; if the problem definition focuses on the way society handles ageing, the approach shifts to national policy, value systems and ideology. The way in which the problem is defined will greatly influence the way in which a planner initiates service delivery. According to Lauffer in "Social Planning at the Community Level", deficiencies or inabilities can exist in a particular population, in service delivery or in terms of inadequate coordination between providers and consumers.<sup>19/</sup> A thorough needs assessment must be made before programs can be planned to meet the needs of this population.

According to Levin and Levin in Ageism: Prejudice and Discrimination Against the Elderly, victim blaming is at the root of policies for the ageing. The authors refer to Ryan's explanation as "the tendency when examining a social problem to attribute that problem to the

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<sup>19/</sup>Armand Lauffer, Social Planning at the Community Level, (Englewood Cliffs, NJ: Prentice-Hall, 1978), p. 83.

characteristics of the people who are the victims".\_20/

Social policies have reflected an exceptionalist viewpoint in which remedial or residual arrangements are made to deal with the problem. Ryan recommends a universal approach which calls for changes in the organization of society so that conditions which create problems are eliminated. Levin and Levin suggest that ageing which is usually treated as an independent variable, should also be viewed as a dependent variable. In other words, ageing shapes the way we live our lives and at the same time is the result of the structure of the complex society in which we live. Programs such as a Friendly Visiting Program can help to alter the way society views the elderly as well as how older people feel about themselves.

Ageing people are often seen as a minority group exposed to all the prejudice and discrimination experienced by other groups such as blacks and women. Minority group discrimination includes stereotyping and notions of appropriate behavior for cohort members. This view points to ageism as a cultural phenomenon which may be a result of the personality needs and social functions of society. Although

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20/ Jack Levin and William C. Levin, Ageism: Prejudice and Discrimination Against the Elderly, (Belmont, CA: Wadsworth Publishing Company, 1980), p. 30.

most minority groups have specific roles assigned to them the aged actually have very few roles. As stated previously, role loss is a major problem for the ageing. Levin and Levin acknowledge that role loss occurs throughout the life cycle but state that role loss prior to old age usually leads to the adoption of new roles.

By contrast, the role exits associated with old age typically are not followed by entry into other socially valued roles. Instead, role exits in old age terminate a person's participation in the principal institutional structures of society - the nuclear family and the occupational structure.\_21/

If role loss leads to lowered self-esteem what can society do to help the elderly regain a sense of purpose and meaning within the constraints of our present socio-economic environment? It is this author's belief that programs such as a Friendly Visiting Program are both cost effective and meet the needs of many isolated elderly in our society.

### Conclusion

Zena Blau in Old Age in a Changing Society presents a realistic view of the problem facing our target population.

The old person's dilemma is this: he needs friends to lessen the effects of major role exit; but just when friendship becomes most important, friendship opportunities are fewer than ever before.\_22/

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21/ Ibid., p. 98.

22/ Zena Blau, Old Age in a Changing Society, (New York: New Viewpoints, 1973), p. 16.

Blau emphasizes the need for many social roles so that a person can exert power over others and over his/her own destiny. The more roles, the greater the chance that he will be needed either for services he/she can offer or for the personal qualities he/she possesses. In reality the number of social roles decrease with age leaving the older person with fewer expressions of his worth. Friendship in old age can fill the void of other role exits

...because friendship rests on mutual choice and mutual need and involves a voluntary exchange of sociability between equals, it sustains a person's sense of usefulness and self-esteem more effectively than filial relationships.\_23/

Blau feels that friendships are confined to people of the same generation and stage of life. She says:

Bonds of friendship, as a rule, develop only between people who view each other as equal and who have the interests and experiences that they can freely share with one another.\_24/

Confirmation of self-worth can be obtained through one's activities or one's personal qualities. A great many aged people lack the opportunity to express their self worth.

Although there are many advocates for segregating the elderly in order to facilitate peer relationships, this author does not feel that this is always possible or even preferable. There is some evidence that older people

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23/ Ibid., p. 17.

24/ Ibid., p. 68.

benefit from relationships with their younger friends.

According to Crystal, policies isolate the elderly from participating in central institutions of our society.

Rather than use their skills, we tend to pension them off from productive social roles, or literally remove them from society by placing them, at great cost, in institutions. Thus our system is as ineffective in meeting the emotional needs of the elderly to participate as it is in providing a reliable social safety net for their more concrete requirements.\_25/

Separating the aged through policy and service delivery stigmatizes them as a cohort group. "The experience of old age is dependent in large part upon how others react to the aged; that is, social context and cultural meanings are important".\_26/ Ageing becomes a social problem only when it is labeled as such by some social group. Perceptions of reality influence consequences. A person's own self-perception can change if others view him/her negatively. According to Estes:

...the labeling of social groups conditions the way others react to them. Thus, the negative imagery associated with the aged may not only damage the psychological self-esteem of the aged themselves but severely impair their capacity as a group to engage in interest-group politics and thereby gain their just share of resources.\_27/

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25/ Stephen Crystal, America's Old Age Crisis: Public Policy and Two Worlds of Aging. New York: Basic Books, 1982. p.10.

26/ Estes, The Aging Enterprise, p.14.

27/ Ibid., p. 228.

This, in turn, perpetuates the myth that the elderly are dependent and in need. The problems of stigmatization of the elderly, then, can often be seen as a result of present social policies.

Older persons' individually are powerless to alter their social status and conditions because their problems and the appropriate remedies are for the most part defined by the dominant members of society. Since the labels and definitions applied to any group in society result from reciprocal relationships in which the relative power, class and social status of interactions play a part, the aged cannot unilaterally alter their relationship to the rest of society.\_28/

The purpose of this project is to study the relationships between older homebound people and younger people who volunteer to be their friends. By achieving a better understanding of this relationship, programs can be designed to better meet the needs of the elderly within a community setting. Staff can be trained to help volunteers establish meaningful and helpful relationships with their friends.

Today's ageing population presents new challenges to social work practitioners, as both the characteristics of the population and the societal environment are changing. According to Brotman there is a high proportion of over age 75 single women who live alone and have some chronic

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28/ Ibid., p. 227.

impairment which affects their daily living. Many of our aged are increasingly isolated both physically and emotionally from the rest of society. This is due in part to the more mobile nuclear family, to the return of the primary caretakers to the workplace and other recent phenomenon. Many aged are homebound due to health or unsafe neighborhoods. Likewise, many social service agencies have experienced cutbacks in funding and funding mechanisms have become more specific about services to be offered. This has created a gap in services for some people in their homes, especially casework services.

In the past, social workers visited the elderly in their homes if they received public assistance or were in need of counseling. Because SSI and Social Security checks are now often delivered by mail or direct deposit to banks, there is no human contact. Caseworkers were often their only visitors and although concrete services were provided, caseworkers provided an ongoing relationship with their clients. Today, some social workers provide the link among agencies in their role as casemanagers overseeing efficient and more effective service delivery. Friendly visitors fill the void left by the reduction of services to those elderly who are lonely and isolated but not in need of more intensive services. Reference has been made to the growing number of people in the over age 75 category

which is the population most at risk of premature placement in hospitals or nursing homes. This group may need fewer concrete services but may result in no service because their needs are less tangible.

Traditional social work has seen this group as needing services demonstrated by the universal view or age entitlements. More recently attempts have been made to engage this population in the giving of services. Although such programs such as Foster Grandparents and Service Corps of Retired Executives have been successful, they require a level of mobility and health not achievable by many older people. What seems to be lacking is a program designed to promote mutuality of services. This type of program would provide some concrete services for the ageing while offering them the opportunity to help others. It is the authors hypothesis that this exchange would increase the morale and self-esteem of the older people. The opportunity to have an impact upon the life of another gives meaning to the older person. The validation of oneself through a meaningful relationship can only serve to make the older person feel better about him/herself.

Reciprocity relates to the activities and tasks engaged in by the older people and their friends while mutuality reflects the attitudes and feelings involved in their

interactions. The author believes that a relationship based on reciprocity and mutuality is more satisfying to the aged than one in which they receive services without giving anything in return. This hypothesis is important in designing programs for the future. As more of our population becomes aged, social workers as well as other mental health practitioners will want to meet the increasing needs of this population.

CHAPTER II  
MAJOR THEORIES ON AGEING

Relevant Theories of Ageing

Program design should not occur in a vacuum but should have a basis within a theoretical framework. Traditional services for the aged have been based either on the theories of disengagement, activity, role, personality or development, symbolic interactionist, balance theory or a combination. This project looks at the relationships which are established through a program known as the DOROT Friendly Visiting Program in which younger volunteers are matched to homebound elderly. The author studied this interaction to determine the level of reciprocity involved in the relationship.

The project's theoretical framework is exchange theory which maintains that interaction between two or more social actors will most probably be continued and positively evaluated if the actors profit from the interaction. Traditional services to the ageing may create a power dependent relationship which prevents the older person from reciprocating and causes loss of self-esteem. If the older person is assumed to have a problem which is addressed through a therapeutic model, this power imbalance is emphasized even more. The problem may be severe or as mild as an adjustment problem to ageing. Either way, the older person may be left with

the feeling that he or she has failed in some way. Helping older people to maintain their self-esteem in spite of their many deprivations is a challenge to the social work profession.

One of the possible values of a program of "friendly visiting" is that more mutuality and reciprocity may be possible. This has value in that older people feel they are participating rather than receiving a service. Their self-esteem is enhanced because they feel someone is interested in them and they feel more connected to the outside world because of this friendship. Although relationships with professionals provide a link to others, reciprocity is not a goal. Friendly visiting does provide an opportunity for older people to give something of themselves to others.

Professional services to the elderly consist of concrete tasks and/or counseling. Concrete tasks include referrals to other services and environmental manipulation such as consulting with other agencies, or providing assistance with housing, health services, funding mechanisms, et cetera. Although some elderly people may feel that their problems warrant a therapeutic relationship, many are looking for a sensitive and empathetic listener. By categorizing this group as in need of traditional mental health services, professionals may further contribute to their low self-esteem.

Screening by professionals is essential to determine the extent of services needed but it should be readily acknowledged that not all older people are in need of casework services.

Some problems of old age may have solutions based on environmental changes rather than the need for psychiatric services. Many older people experience depression and low self-esteem due to their isolation. Although this can manifest itself in clinical symptoms, it can be treated through environmental manipulation to remove the stigma of victim blaming. Although the initial matching process by professionals can be seen as influencing the environment, the relationship that develops is based on the needs of the older person and the friendly visitor. The use of trained volunteers will be examined later in this project to determine if they can provide the type of service many older people need to reduce isolation.

Exchange theory examines the cost of interaction between two people across several dimensions. Services are seen on concrete as well as value levels. What one person does for another and what a person feels is being done are equally important.<sup>29/</sup> The current study examined

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29/ Peter Singelmann, "Exchange as Symbolic Interaction: Convergence Between Two Theoretical Perspectives", American Sociological Review, Vol. 37, 1972, p. 417.

the tasks that each person does for the other and the feelings elicited by the relationship. This type of self-report can serve as a needs assessment for the type of services the elderly feel they want or require. Implementation of a friendly visiting program based on exchange theory can then be translated into a training manual to teach staff how to prepare volunteers to enter into reciprocal relationships with their "friend". This project has clear implications for future program design as well as for evaluation of current programming.

But before exchange theory is discussed in detail, a brief review of several major theories which have influenced the field of ageing is in order. It is important to understand how each theory has developed as well as its relevance to our target population. No theory can be applied to all elderly since they represent such a heterogeneous population. The field of social work should examine all possible theories which can better serve the needs of older people. According to Estes:

Although empirical research in aging provides a partial basis for policy development, even more important is the potential contribution of gerontological theory to the underlying rationale for those policies.\_30/

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30/ Estes, The Aging Enterprise, p. 7.

The combination of research methodology, empirical findings, knowledge, and changes in public sentiment contribute to public policies and must be understood within the appropriate socio-economic context.

### Disengagement Theory

The theory of disengagement proposes that as people get older they prepare for death by a gradual and mutually satisfying process of withdrawal from society. This theory has a base in functionalism in that it enables society to maintain equilibrium by preparing for the inevitable. Disengagement involves the loss of roles, a contraction in contacts and a decline in the commitment to norms and values.

Cumming and Henry are perhaps the founding authors of the disengagement theory. In Growing Old, they see disengagement not only as an inevitable, natural occurrence, but also as a positive, adaptive approach to successful ageing. Some critics of this theory contend it does not view ageing from a historical perspective nor does it take cultural differences into consideration. According to the study done in Kansas City, Missouri using two samples of men and women over a six year period, disengagement reduces social roles, social relationships, and feelings of meaningfulness in the elderly. The first sample represented

a group of middle and working class white persons between the ages of 50-70 who were in moderate to good health; the second sample represented the same characteristics but in a group with ages between 70 and 90. Study findings suggested that for many people, role disengagement did not impair but rather enhanced the life of the subjects.\_31/

Disengagement, at one time, helped explain why older people no longer functioned to their full capacity in society. Society was not seen as responsible for pushing the elderly aside; rather, they went willingly. This theory lost popularity as other theorists showed how other factors influenced the disengagement process. Although some people choose to withdraw from society, studies have clearly shown that this is a factor based on an individual's personality rather than singularly a function of old age.

Havighurst, Neugarten and Tobin, in "Disengagement and Patterns of Aging" address this personality factor element within the disengagement process. They recognized the process of disengagement but question it as a theory of optimal ageing. They also describe two types of disengagement which can occur simultaneously or independently of each other: social disengagement -- the reduced number and

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31/ Ibid., p. 7.

duration of social interactions, and psychological disengagement -- the reduction of emotional commitment and with what is going on in the world in general. In terms of research implications, if it can be shown that psychological disengagement precedes social disengagement, the resulting phenomenon is developmental rather than cultural. Havighurst, Neugarten and Tobin did in fact find some supportive evidence for this theory.

Disengagement theory is criticized in Arnold M. Rose's "A Current Theoretical Issue in Social Gerontology ". He first questions the process of disengagement as being inevitable and points out that, for some people, this non-engagement is a life long characteristic not related to age. He next questions Cumming and Henry's value judgement that disengagement is desirable and cites the Havighurst, Neugarten and Tobin study that the engaged rather than the disengaged are the happiest. Last he criticizes Cumming and Henry for not analyzing disengagement within the context of the present social structure and social trends.

In summary, disengagement theory states that later life is different from the middle years and is characterized by a different style of life and level of social involvement. The theory states that social and psychological factors lead to a voluntary withdrawal from society. This process

is said to assist one to prepare for the inevitability of death.

Disengagement theory does not take into account the environmental and personal factors which may lead an older person to withdraw from society. Feelings of hopelessness, physical capabilities, financial limitations, fears for safety and lack of opportunity can have a direct bearing on level on interaction.

Disengagement theory is an example of functionalist theory with homeostasis as a central theme. Balance is maintained when both the individual and society choose to remain engaged or disengaged. Problems arise when there is a conflict between the two. Systems theory viewed ageing individuals who did not disengage from the social order as dysfunctional because they detract from systems equilibrium. The real problem seems to be that what is functional for society (older generations making way for younger ones) is not necessarily functional for the ageing individual. Policies related to disengagement theory include mandatory retirement, the establishment of high density elderly housing and retirement communities. Although some people were helped, other became more isolated from mainstream society.

While disengagement has been highly criticized, it

was an attempt to understand why older people leave the mainstream of society. Other theories have largely discredited the idea that older people, in general, are happier once they disengage from their commitments to society. Activity theory offers opportunities for interaction and symbolic interaction lifts barriers, but only exchange theory addresses the attitudes and feelings which are affected by an older person's need to relate to others. The desire for a reciprocal relationship would lend further support for applying exchange theory to the field of ageing.

#### Activity Theory

The activity theory of ageing asserts that there is a positive relationship between the aged individual's level of participation in social activity and his/her life satisfaction. This theory addressed the needs of older people who had few friends and wanted to remain active. Recreation or leisure activities provided an outlet for keeping busy and meeting peers. Participation in groups was thought to be an important factor in life satisfaction. Unfortunately, many older people are homebound due to illness or unsafe environmental conditions and are therefore unable to get to senior centers. Other people lack the motivation to leave their homes. This author studied older people who choose not to participate in group activities. For this population, a one-to-one relationship may be more

viable. It is important to review some of the studies which have examined activity theory in order to gain a better understanding of the field of ageing.

Cutler, in "Voluntary Association Participation and Life Satisfaction: A Cautionary Research Note", examines the possible underlying reasons for the positive relationship between voluntary participation and life satisfactions as self selection of the participants. In other words, it may be that the healthier, better adjusted elderly choose to join clubs. He conducted interviews with 170 institutionalized persons of 65 and older in Oberlin, Ohio. The data was analyzed by multiple classification analysis which allowed Cutler to conclude that, after holding distributional effects of health and status socioeconomic constant, only a weak and non-significant relationship exists between voluntary association participation and life satisfaction. He concludes that life satisfaction appears to be primarily a function of personal and social characteristics and role relationships.

Bull and Auroin replicated Cutler's study in "Voluntary Association Participation and Life Satisfaction: A Replication Note" and achieved the same results. They used a random selection of 97 institutionalized respondents of over age 65 in Kansas City. Their sample differed slightly in terms

of sex and race from Cutler's study. The sample population in the Kansas City study was 97 compared to 170 in Oberlin. Both the LSIA and the multiple classification analysis were duplicated. The authors found that when controlling for effects of health and socioeconomic status, the relationship between voluntary association participation and life satisfaction becomes non-significant. This study supported the Cutler study but it raised questions as to type of voluntary associations and level of satisfaction of individuals prior to participation.

George Maddox in his article, "Persistence of Life Style Among the Elderly: A Longitudinal Study of Patterns of Social Activity in Relation to Life Satisfaction", discussed results from his study of 148 non-institutionalized volunteer subjects over the age of 60 as observed over a seven year period. He contends that maintaining contact with the social environment is linked to maintaining a sense of life satisfaction. The key to this study might be the continuity of activity factor which may test a variable other than participation in activities. The important issue is that people should continue middle age life styles into old age in order to maintain high life satisfaction.

Activity theory assumes that successful ageing is positively correlated to maintaining the activity and

involvement levels in middle age. While this allows for more engagement in society, it also assigns the responsibility for remaining active to the older person without necessarily providing appropriate outlets. Senior citizen centers are attempts to reduce the isolation of older people. Although senior centers encourage socialization and offer many activities they do not reach those who are homebound or who have disengaged from participation in social activities. The target population in this author's study either could not get to a center or did not wish to do so. Although loneliness was a presenting problem, the aged did not feel that the atmosphere of a center was conducive to forming the type of relationship which would alleviate this problem.

Although one can strive to maintain previous levels of involvement, this is not always possible. Old age often brings physical impairments and a loosening of ties to others through relocation, illness or death. Many older people have no interest in group activities preferring the company of one person with whom they can share their thoughts and feelings. For these people a friendship alleviates their isolation better than an activity or physical proximity to others.

### Role Theory

The third theory to be reviewed is role theory which

supports the idea that problems associated with ageing are related to loss of status and roles which cause an individual to feel isolated from society. The older person is encouraged to reach out to new roles. The problem is that there are very few new roles assigned to the ageing as old roles are withdrawn.

As people lived longer and in better health, they became more concerned with planning for life after retirement. The government tried to utilize some older people through programs such as Vista, Peace Corps, Foster Grandparents and Senior Corps of Retired Executives. These programs helped some older people to find a new place in society. Unfortunately, the more physically impaired were excluded as well as those without specific skills and those unwilling to relocate. The idea of sharing ones self with others needed to be expanded further. A Friendly Visiting Program is one way of achieving this goal. Understanding the value of this program is contingent upon a knowledge of the importance of roles.

Rosow gives his interpretation of role theory in "The Social Context of the Aging Self". He maintains that role loss creates stress which, in some people, leads to incidences of mental illness. There are five factors which relate to this stress:

1) role loss devalues the aged by excluding them from significant social participation,

2) old age is the first stage of life where systematic status loss for an entire cohort occurs,

3) society is not socialized to the fate of ageing,

4) a lack of specified roles for the elderly make them socially unstructured, and

5) role loss deprives people of their social identity.

Rosow continues by pointing out that personality factors affect the way in which individuals cope with these stresses. He suggests these effects can be moderated by strong group support. In Social Integration of the Aged, Rosow studied 1200 older, middle and working class residents. He concluded the following:

1) in terms of friendship, local density is more important for working class than middle class people,

2) friendships are formed between persons of similar status (age),

3) person-environment relationships help to clarify the character and functions of friendship,

4) reference groups are important (family, neighbors and friends), and

5) the greater the disruption of role loss the more responsive the person will be to social opportunities.

Weiss in "Loneliness: The Experience of Emotional and Social Isolation" sees disruption of social role as capable of producing social isolation and that changing of one role to another is one solution to the issue of loneliness. The problem then becomes finding new roles that are acceptable to society.

Havighurst, Neugarten and Tobin, in "Disengagement and Patterns of Aging" state that neither disengagement nor activity theory is entirely satisfactory, but that personality also plays a significant part. They conclude that an individual may withdraw from the patterns of specific role activities that characterized him/her in middle age but does not withdraw from those values of society that have been internalized. This supports the idea of substituting new and meaningful roles for those the older person has lost in the ageing process.

Rose, in "The Sub-Culture of the Aging: A Topic for Sociological Research", concludes that the aged interact more readily with each other because they are ordinarily excluded from interacting with other groups. This contradicts Rosow's study of a natural affinity toward similar status. Rose sees a class distinction in that the wealthy have more contact with the general population than do the middle and lower classes who usually socialize in the workplace.

Therefore it would seem that role loss would be more disruptive to lower socio-economic groups.

Reed Larson in "Thirty Years of Research on the Subjective Well-Being of Older Americans" concludes that well-being is most strongly correlated to health, followed by socio-economic factors and social interaction. Larson examined the limitations of measuring well-being as the extent to which it can be assumed that instruments measure the same thing in differing populations, as well as the interpretations that can be made by mood and individual response styles. Nonetheless he concludes that there is an association between activity and role counts which correlates with well-being.

Role substitution has been recommended but few roles are made available to the ageing. Vista, Peace Corps, Senior Corps of Retired Executives and Foster Grandparents are, as previously stated, notable programs which provide suitable roles for the ageing. In a society which places value on youth rather than ageing, new roles are difficult to find. Role theory is an extension of activity theory stressing the importance of keeping busy but emphasizing the continuity of meaningful roles for older people.

Role theory stresses the importance of taking on new roles. Society does not provide access to new roles for

many older people who are homebound or have physical impairments. It is important to look at what is possible within the context of their lives. How can their lives be more meaningful and what role can they realistically play. While the role of friend is familiar to most people, the difficulty is in providing opportunity for a relationship to develop. Friendly visiting is one way older people can expand their horizons and to feel that they have become an important part of society again.

#### Developmental and Personality Theories

The developmental theory of ageing should also be examined. This theory is based on Erickson's last stage of ego integrity versus despair. Summarized, this stage represents satisfaction with life, work and accomplishments. The successful completion of this stage enables the individual to accept responsibility for his/her own life and to maximize success. The possessor of integrity is ready to defend the dignity of his/her own lifestyle against all physical and economic threats.

Developmental theory stresses the psychological or personality aspects of the ageing process. Maintenance of a mature, integrated personality are stressed. The individual continues to exercise choice and select from his/her environment that which will serve him/her best.

Robert Peck, in "Psychological Developments in the Second Half of Life", outlines areas necessary for successful ageing. He examines the following:

1) ego differentiation versus work-role preoccupation as the ability of an individual to reappraise and redefine his worth in a broader range of activities;

2) body transcendence versus body preoccupation as the ability to define happiness and comfort in terms of satisfying human relationships, or creative activities rather than physical comfort; and

3) ego transcendence versus ego preoccupation as the individual's inner state of contentment or stress, and his constructive or stress inducing impact on those around him.

An important conclusion for future research is Peck's emphasis on sampling with respect to stage of life rather than solely on chronological age.

Peck and Berkowitz conduct further studies in "Personality and Adjustment in Middle Age". Findings suggest that personality patterns are firmly established before middle age and that measures designed to maximize general adaptability and personal integration in the interests of successful ageing need to be taken early in life. Their findings also point to social effectiveness and emotional stability

as positively related to social class.

Neugarten, Havighurst and Tobin examined this in their article, "Personality and Patterns of Aging", but with different results. This study examines three sets of data: personality type, extent of social role activity, and degree of life-satisfaction. The sample group was the same group which formed the original population in the Kansas City Study of Adult Life. The authors did make a note that the group's survival rate was 60% and that those people remaining at the end of the study represent the relatively advantaged 70 year olds who had had better than average health, cooperativeness, and general well being. The life-satisfaction measure was the LSI. The study isolated four major personality types with varying degrees of role activity and life satisfaction. These types included integrated, defended, passive-dependent and disintegrated personalities. The authors summarized the study by stating that they regarded personality as the pivotal dimension in describing patterns of ageing and in predicting relationships between level of social role activity and life satisfaction.

The program aspects of the developmental model called for mental health services provided to the general population in an effort to improve adjustment to various life stages. Education and self-help groups should be included in this

model. Developmental theory is a more individualistic approach to ageing. People enter old age with a variety of strengths and weaknesses and are able to handle crisis in a variety of ways. One cannot assume that all older people need the same intervention.

Exchange theory allows for individuals to express their needs and negotiate a solution through a one-to-one relationship. This can become a friendship in which each partner can fulfill themselves in their own style and manner. Developmental theory focuses solely on the individual. It assumes that viable choices are available to the older person. Exchange theory adds another dimension which is the interaction between the individual and another.

#### Symbolic Interaction Theory

Estes proposes the theory of symbolic interaction which states that it is the interaction between a person and his environment that affects the experience of ageing. Life satisfaction and morale can be improved by altering the experience. Disengagement, low self-esteem and dissatisfaction are seen as resulting from the interaction between the aged and others. Society must build, sustain, or reconstruct self-esteem through environmental

interventions.\_32/ Estes says:

Both the self and society are seen as capable of creating new alternatives. Social context is crucial; cultural meanings and values are critical and dynamic rather than universal or unchanging. The symbolic interactionist perspective emphasizes the diversity of outcomes that can result from variations in individual commitments and the salience of different issues and situations to the participants.\_33/

Robert Butler is also a proponent of symbolic interactionism. In his book Why Survive: Being Old in America, Butler discusses research done at the National Institute of Mental Health which observed the critical significance of environment on mental health. In referring to the elderly he states "Effective commitment to something outside oneself and the ability to act on ones own behalf are energizing".\_34/ Butler fears that age segregation will affect younger generations by depriving them of their sense of ancestry, history and roots. This will ultimately contribute to a loss of an understanding of themselves. Butler finds this exclusivity of generations non-functional for all segments of the population.

Symbolic interactionists are also concerned with the

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32/ Ibid., p. 9.

33/ Ibid., p. 9.

34/ Robert M. Butler, Why Survive? Being Old in America, (New York: Harper and Row, 1975), p. 332.

self-concept older people have as reflected back through the eyes of society. Self-image is affected by the way others view one. Therefore the type of interaction a person has with others, either positive or negative, will to a degree determine his/her feelings about him/herself.

Symbolic interaction proposes changes in the environment to allow the elderly to reach their maximum potential without hindrance from societal bias. Programs based on need rather than entitlement, which do not separate the elderly from other age groups, would be examples of this theoretical perspective. Intergenerational programs which encourage the lifting of societal barriers would also be part of symbolic interactionist theory.

Symbolic interactionism has been criticized for not dealing with the issue of power and minimizing the social and structural constraints which may affect older people. Exchange theory, which introduces power as a central theme, allows older people to affect outcomes in a one-to-one relationship. Using friendship as a means of controlling ones environment permits the inclusion of all classes of people. Exchange theory affects the way others view the elderly. Through a relationship with older people, younger people may change their attitudes and would then be able to transfer those feelings to other older people. The

changing of perceptions is an important component of symbolic interactionist theory.

#### Balance Theory or Theory of Shared Functions

The theory of shared functions is usually applied to the relationship between formal organizations and primary groups. It suggests that while formal organizations provide technical knowledge and primary groups are necessary for non-technical tasks, the inter-relationship of the two allow for a balance.

The linkage between the formal organization and the primary group must be close enough to permit coordination but not so close as to cause their contradictory structures to negatively influence each other.<sup>35/</sup>

Litwak discusses a midpoint between the two structures which is referred to as the point of balance.

The balance theory was applied to the field of ageing in a study performed by Rose Dobrof in which nursing home patients with active families were compared to patients without families. She found that the aged received maximum care when linkage mechanisms were created which balanced their relationships close enough that each could perform

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35/ U. S. Department of Health, Education and Welfare, Public Health Service, Alcohol, Drug Abuse and Mental Health Administration, "Theoretical Bases for Practice" by Eugene Litwak in Maintenance of Family Ties of Long-Term Care Patients, (Rockville, MD: DHEW Publication, 1977) p. 92.

its task yet with enough distance so that the purpose of each was not subverted. Dobrof's assumption was as follows:

Old people in institutions will be cared for best if the relationships among them, the policy makers and staffs of the institutions, and their families are characterized by mutuality of respect, concern, and willingness and ability to work together\_36/

The shared function theory helps to determine whether distance is too great or too close and to select linkage mechanisms designed to bring them into better balance. This has direct implications for this author's study which used volunteers to bridge the gap between the formal organization and the older person. Volunteers were able to perform those affective tasks (non-technical) which then allowed the agency to perform its technical tasks. Volunteers became a surrogate primary group for the older persons.

According to Litwak, the family members or primary groups use love, affection and preservation of the relationship as their criteria.\_37/ Formal organizations, on the other hand, stress the use of written rules and impersonal relations. The theory of shared functions suggests that there are

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36/ Rose Dobrof, "The Care of the Aged: A Shared Function" (DSW dissertation, Columbia University, 1976) p. 139.

37/ U. S. Department of Health, Education and Welfare, "Theoretical Bases for Practices", p. 82.

many times when technical knowledge is not crucial but access and commitment to the person is more effective. The balance between organization and volunteer will best meet the need of the older person.

One can also examine the relationship between the older person and the volunteer as a balance in which the distance cannot be too close or too isolated in order to achieve a successful friendship. The volunteer must be helpful but not infringe upon the autonomy of the older person. The older person can make demands but not to the point of over-taxing the volunteer. Emotional commitments are sought but not to the extent of burdening the other person.

Litwak's balance theory can also be applied to the relationship between the organization and the older person with the volunteer as providing the balance. The volunteer determines the distance between the agency and older person by controlling the flow of information. If the volunteer asks for assistance in working with the older person, he/she brings the agency closer. If very little is reported, the agency becomes more distant.

The organization can also try to control the nature of the relationship between the older person and the volunteer

by either over burdening the volunteer with demands (e.g., paperwork, training, reports) or by leaving the volunteer without back-up professional assistance. The agency can intercede if they determine that the relationship between the volunteer and older person is either too close or too distant.

Although the theory of shared function, or balance theory, is applicable to the field of ageing, it does not examine the balance between two parties, namely the volunteer and the older person. The concept of shared function is important, especially in understanding the triad of agency, volunteer and client. The theory of shared functions stresses making service delivery more efficient. It relates to mutuality of concern and respect in order to better serve the client. Balance theory does not concern itself with equity or reciprocity between two individuals but instead deals with the relationship between a formal organization and a primary group (e.g., family of client). This author's study, however, was concerned with the reciprocal relationship between an older person and a volunteer who visited on a weekly basis. The friendship that developed, based on mutuality, can best be understood through exchange theory.

#### Summary of Theories on Ageing

After reviewing the major theories on ageing, this

author recognized that there are still areas of concern. The problems of many older people do not seem to neatly fall into any of the categories which other theories address.

Disengagement involves the loss of roles and a contraction in outside commitments which many older people experience. The author questions whether this withdrawal is a function of old age or rather based on the individual's personality and/or the environmental factors which may make continued contacts very difficult. Disengagement as a theory attributes certain phenomena to ageing which may be a consequence of social factors.

The problem of loneliness in old age is addressed in activity theory in that it proposes participation in leisure or recreational activities. The theory urges older people to maintain the same level of involvement as they did in their middle years. For example, high levels of socialization are provided through senior centers. Activity theory does not speak to the needs of the homebound elderly or those who feel a one-to-one relationship is more helpful in relieving loneliness than group participation.

Role theory delves deeper into the emotional needs of the elderly by acknowledging that the loss of status and meaningful roles may be the cause of the individual's

feeling of isolation. Older people are encouraged to reach out to new roles which society offers. By their design, however, programs which afford opportunities to older people exclude the homebound. Therefore and although the concept is valid, role theory does not reach many people who would like to expand their horizons and bring more meaning into their lives.

Maintenance of a mature, integrated personality is stressed in the developmental theory on ageing. The individual is encouraged to continue to exercise choices and select from his/her environment that which will serve him/her best. Acknowledgement of an individual's strengths and weaknesses is important but this theory assumes that older people are in situations where options are viable. All too often environmental factors effectively limit choices.

Symbolic interaction takes into account the interaction between an individual and his/her environment which affects the experience of ageing. Changing the environment will change the experience. The interaction between the older person and others will change the stigma of ageing and improve the older person's self-concept. Symbolic interaction proposes long range changes in society but is not intended to have an affective role in changing the lives of the homebound elderly on an immediate basis.

Balance theory, sometimes referred to as the theory of shared functions, examines the relationship between formal organizations and primary groups. It can be applied to the field of ageing through studying the linkage mechanisms in service delivery systems. The concept of reciprocity is introduced but not developed fully.

The target population of homebound elderly persons may not always be able to benefit from the direct application of the theories previously reviewed above. Because this population is both isolated and lonely, community based senior programs may not be a viable option to them. Accordingly, the author is of the opinion that exchange theory was more appropriately applicable to this population.

#### Exchange Theory

Exchange theory is usually applied to economics, but can also be applied to social work practice as well. This author feels the concepts of reciprocity and mutuality, which are the cornerstones of exchange theory, can be applied successfully to social work. The target population of elderly, homebound people is a group which is not able to utilize various other theories of ageing previously reviewed. Therefore the social work profession should examine alternative theories which may be applicable to service delivery.

According to George Homans in Social Behavior: It's Elementary Forms, the expectation in exchange theory is that the greater the reward, the greater the costs, that profits are proportional to investments, and that the greater the investments the greater the profits. Sentiments and feelings are overt behavior and are considered activity. Interaction occurs when an activity emitted by one person is rewarded or punished by another person. The variables associated with interaction include quantity or amount of time, and values or degree of reinforcement or punishment. One important reinforcement is social approval. The withdrawal of a positive reinforcer is as much a punishment as the presentation of a negative one. The ageing population suffers from the withdrawal of social approval, thereby incurring a cost which translates into a lowering of self-esteem.

Most research on exchange theory has been on small group behavior or bureaucratic models. This dissertation examines the concepts of exchange theory as it applies to the interaction between elderly people and others in the context of a relationship. If profit is reward less cost, then what is the potential profit to the elderly in a relationship and what is the cost?

A Friendly Visiting Program is based on mutual exchange,

also known as friendship. When a relationship is considered balanced by both parties, satisfaction is achieved and the relationship will continue. The relationship becomes costly when one party feels he/she is not participating fully and loses self-esteem. This project examines the perceptions of older people, as well as volunteers, who are engaged in relationships. Level of satisfaction is measured against level of mutuality to determine the appropriateness of exchange theory to this population.

According to Blau in The Dynamics of Bureaucracy, social exchange occurs when one person furnishes a service to another. Although there may be no contract of a specific service to be returned there is a general expectation of a future return. Social exchange requires a degree of trust that a service will be forthcoming generating an expectation of reciprocity. According to Blau, if a person supplies important services to another, the second person becomes dependent on and obligated to the first. If the second person reciprocates by giving something of importance to the first person, he has balanced the relationship. If however, the second person cannot give an equally valuable service, he becomes both indebted and dependent on the first person creating a power dependent relationship. The second person would then need to discharge his service obligation by deferring or subjugating himself to the first. This can be understood by examining the elderly's use of

compliance. If a person feels he/she has nothing of value to offer he/she may become overly conformable in order to retain the approval of the other person. This can eventually lead to a lowering of self-esteem.

According to Homans, activities exchanged are sentiments or social approval, or activities proper. Exchange is balanced if both parties conform to the norms that have value to each other.

A norm is a statement made by some members of a group that a particular kind or quantity of behavior is the one they find valuable for the actual behavior of themselves and others whom they specify, to conform to.\_38/

If one person does not conform to norms the exchange is unbalanced and will be terminated, or disapproval will be expressed. Many interactions involving the elderly are based on compliance in which the older person gives social approval to the younger person, thereby encouraging that person to continue the relationship. "Men give social approval as a general reinforcer to others that have given them activity they value, and so make it more likely that the others will go on giving the activity".\_39/

Mutuality of exchange does not infer that the activities

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38/ George C. Homans, Social Behavior: It's Elementary Forms, (New York: Harcourt, Brace and World, 1961), p. 116.

39/ Ibid., p. 129.

involved in the exchange are similar. In any successful exchange each person should have a feeling of profit. The concept of distributive justice pertains to whether each person feels he is getting not just a profitable exchange but a fair exchange. "...[I]n explaining the behavior of two men toward each other, we need to know the relation between the values of the one and those of the other".<sub>40/</sub> In fact, sometimes it is the very differences between people that makes exchange successful. For example, if one person valued help more than approval and another person approval more than help, that difference makes the exchange profitable to both. According to Blau "no exchange will take place unless both parties to it feel that they will benefit from it, which can occur only provided that their wants and preferences differ".<sub>41/</sub> The value of an activity must be measured by the person receiving the activity not by the one giving it.

The open secret of human exchange is to give the other man behavior which is more valuable to him than costly to you and to get from him behavior that is more valuable to you than it is costly to him.<sub>42/</sub>

Each person can change the type of activity to make it more valuable to the other as long as the relationship remains equal. However, if one person changes the value

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40/ Ibid., p. 214.

41/ Peter Blau, The Dynamics of Bureaucracy, (Chicago: University of Chicago Press, 1955), p. 138.

42/ Homans, p. 62.

of the activity and the other does not the balance changes. In an unbalanced relationship one party incurs cost. An activity incurs cost when an alternate and rewarding activity which is available is not given in return. Cost is the value of a reward obtained through a unit of an alternate activity, which is foregone by emitting that activity. Over time, unrewarded activity will diminish or an unrewarding relationship will terminate. A rewarding exchange, on the other hand, will produce more interaction.

The more valuable to a person the activity others give him, and the more valuable the approval he gives other and the more often he emits activity, including sentiment, to other. 43/

In most relationships the person initiating the activity is the one lowest in self-esteem. The one individual asking for help is held in lower esteem than the helper. The degree of cost incurred will depend in great part upon the status the recipient holds. If the status is already low the cost will be less. If a person feels unable to reciprocate he may not ask for help at all unless he sees himself as inferior with nothing to lose by an uneven exchange.

In a volunteer Friendly Visiting Program both parties are initiating the relationship. No one feels at an initial disadvantage, which may occur in a client orientated

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43/ Homans, p. 182.

relationship. Although their reasons for entering the program may be different, both have a need to fulfill which places them on equal status. The matching process, which is the responsibility of the professional worker, represents the meshing of strengths and weaknesses which could eventually lead to a mutual exchange.

Emerson examines exchange theory in "Power-Dependence Relations". He says that "special relations commonly entail ties of mutual dependence between the parties".<sup>44/</sup> The dependence of one party provides the basis of power for the other and this power is based on his/her control over the things he/she values.

Emerson sees cost as that which an individual must overcome in order to obtain a goal and cost reduction as a process involving a change in values which reduces the discomfort incurred in meeting the demands of the more powerful person. He sees balancing operations falling into one of the following categories: withdrawal, extension of power network, emergence of status or coalition formation. This project's goal is to increase the elderly's status in order to balance the exchange.

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44/ Richard Emerson, "Power-Dependence Relations" in American Sociological Review, Vol.24 (1962), p. 32.

The quality of social interaction seems to decrease with age and disengagement occurs due to the power imbalance between the aged and the rest of society. The aged become power dependent in a social exchange when they feel unable to reciprocate a rewarding activity or behavior. The only avenue presently considered open to the aged in a social exchange is compliance. This is the most costly behavior in terms of self-esteem.

In the case of the aged, decreased social interaction is the eventual result of a series of exchange relationships in which the relative power of the aged vis-a-vis their social environment is gradually diminished until all that remains of their power resources is the humble capacity to comply. 45/

Dowd reviews Emerson's possible balancing operations as they pertain to disengagement theory, extension of power network as activity or role theory, emergence of status as symbolic interaction theory, and coalition formation as a form of advocacy. The important theme is the exercise of power. Resources must be available for exchange in order to exercise power. These resources include money, knowledge, persuasiveness and social position.

Blau sees power resources as money, approval, esteem

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45/ James Dowd, "Aging as Exchange: A Preface to Theory" in Journal of Gerontology, Vol.30(5) (1975), p. 587.

or respect, and compliance. In a social relationship the two generally utilized resources are esteem and compliance. Esteem is the more preferable as it is less costly than compliance. However since many older people view themselves as lacking anything of value to offer they instead exchange compliance which establishes a power dependent relationship. This would explain why older people in high income brackets can retain their positions in society. They are able to exchange money and social position rather than compliance, to retain their self-esteem. This project will measure the interaction of older persons involved in relationships in which respect or esteem is the resource exchanged. The interaction through which this occurs will be referred to as a friendship.

If, as the author hypothesizes, an intergenerational Friendly Visiting Program fulfills the mandate of exchange theory, then the field of social work needs to become more familiar with this approach to ageing. Activity, disengagement, role, personality, symbolic interactionism, and balance theory have validity for some ageing people but exchange theory can also be applied. Exchange theory can be used to plan programs which meet the needs of a population currently under served. Program planning and design should be based on a theoretical framework with application to the target

population. This project studies the success of a service delivery and the values behind it, within the framework of exchange theory.

## CHAPTER III

IMPORTANCE OF FRIENDSHIP TO THE AGENCY  
AND THE ROLE OF THE VOLUNTEERIntroduction

The author has reviewed the theories of disengagement, activity, role, developmental or personality, symbolic interactionist and balance theory. All can be applied to some elderly with specific needs, but no one theory is applicable to all the elderly. This is because older people represent such a heterogeneous population comprised of people of different ethnicity, cultural experiences, and socioeconomic backgrounds. Because their life experiences vary so greatly their needs will be different when they enter late adulthood. Each of these theories has relevance to an unmet need and each service offered has validity to a specific target population.

The author feels that there is a growing population of older people who are isolated by health or circumstances. These people reside in the community, in this case on the Upper West Side of Manhattan, New York, but have little opportunity to interact with other people. As a result, they feel lonely and begin to lose a sense of contact with the outside world. A program of "friendly visiting" helps to alleviate this isolation by matching a younger volunteer to an elderly homebound person through weekly visitation.

This relationship, based on mutuality (attitudes) and reciprocity (activities) fulfills a need for companionship and contact with the outside world and creates a sense of caring for others, which older people reported to be important to them. This program should be seen as an adjunct to other needed services rather than a substitute. Friendly Visiting Programs fill a specific need for older people but an assessment must be made by a qualified professional before services are offered. Friendly Visiting is not a social work intervention although it can be considered to be part of a social work program. It is necessary to understand the importance of friendship to older people in terms of their mental health before examining a Friendly Visiting Program.

#### Loneliness In Old Age

Loneliness can be a result of one's life circumstances or one's personality. Many older people find that their peer group has decreased due to death or illness, spouses have died, families move to other locations, and work is no longer a viable alternative. Lack of mobility may hinder their meeting new people and lack of resources may preclude many social activities. Older people often feel that it is difficult to make friends and that they have nothing in common with other older people except age. These factors can cause a lack of stimulation for some and a deep loneliness

for others. It is important to understand the concept of loneliness and its accompanying isolation as well as their impact on both the mental and physical well being of the aging person.

Vira Kivett in "Discriminators of Loneliness Among the Rural Elderly: Implications for Intervention" examines the phenomenon of loneliness. She defines it as the general wish or longing for a specific form of relationship, not just the desire for company. A relationship fulfills the need for human intimacy and cannot be replaced by frequent contact with others. Kivett found that the determiners of loneliness can best be categorized into social and physical losses sustained by the elderly person. Areas of intervention include better transportation, communication (telephoning), social activities and relationships. Since the target population is primarily homebased, the author examined interventions which encourage relationships. Kivett suggests mutual self help groups of peers who could offer role models, friendship and a bridge to the community. She stresses the importance of creating an opportunity for a relationship to develop which can provide the intimacy of past lost relationships.

In "Loneliness: The Experience of Emotional and Social Isolation", Weiss stresses the importance of social roles

to replace those lost to the elderly person through retirement, death and cultural changes.

Lowenthal and Haven in "Interaction and Adaptation: Intimacy as a Critical Variable" suggest that many age-linked traumas such as widowhood, retirement and a decrease in social activity, which usually lead to a decrease in morale, can be partially alleviated by an intimate relationship or through a confidant. They found that the morale of people who are more isolated in old age, but who have one intimate friendship, is as high as that of people with increased social participation. The authors stressed intimacy and capacity for mutuality as vital factors. This is of great importance for the mental health of the homebound elderly.

A longitudinal study of psychological health in later adulthood by Clark and Anderson found the availability of a confidant to be the strongest single predictor of well being. For older people, the presence of an intimate relationship in which personal concerns can be shared is an important source of well being. 46/

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46/ M. Clark and B. Anderson, "Loneliness and Old Age" in J. Hartog, J.R. Rudy and Y.A. Cohen (eds), The Anatomy of Loneliness (New York: International University Press, 1980).

Lowenthal and Robinson cite the importance to the ageing of control over social life in "Social Networks and Isolation". The authors feel that friendships develop voluntarily and are based on common interests and lifestyles as opposed to kinship relationships. Therefore, friendships afford greater parity of roles and visits tend to be scheduled at mutual convenience.<sup>47/</sup> Lowenthal and Robinson also stress the importance of quality of friendship rather than merely the amount of time. Social exchange and level of interaction are also important variables.

This author feels that although friendships are usually characterized by peer relationships, intergenerational friendships can satisfy many of the same criteria without some of the accompanying difficulties. Peer relationships are often difficult for older people because one or both parties have problems traveling, are in ill health or have other impairments that make visiting difficult.

Many older people have difficulty initiating relationships. This may be due to lack of social opportunities, personal problems such as self-presentation, social assertiveness or communication skills, or cognitive functioning problems

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47/ M. F. Lowenthal and F. Robinson, "Social Networks and Isolation" in R. Binstock and E. Shanas (eds), Handbook of Aging and the Social Sciences (New York: Van Nostrand Reinhold, 1976).

such as unrealistic expectations, distorted perception of self, or low self-esteem.

There seems to be consensus that older people need intimacy, social roles, capacity for mutuality and availability of a confidant in order to alleviate loneliness. Friendships based on the exchange model do fulfill these needs and should be considered a viable alternative to services for the ageing.

### Friendship

Older people often find themselves alone at a stage of life when they are most dependent on others for emotional support. During working years, there are many outlets for socialization. Co-workers often become friends, fraternal organizations and religious groups offer opportunities to meet people and even raising children can lead to making friends. Once these roles are no longer available due to changes in life stages, the older person loses the chance to establish new friendships. Old friends are lost due to illness, death and relocation, leaving the older person very much alone except for family. When there is no family, that loneliness is even more acute. Although people are living longer there is no reason to think their situation will change as long as the role limits society puts on the elderly remain basically the same.

The importance of friendship to the elderly must be examined. Through the many studies of life satisfaction, research has identified two key components: 1) the level of social participation and 2) contacts with friends. Rosow in Social Integration of the Aged advocates for high density elderly communities to promote the development of friendship. He states that friendships become more important as other roles diminish.

Patricia Spakes also finds that friendship rather than family and/or community involvement plays an important role in life satisfaction. In her article "Family, Friendship and Community Interaction as Related to Life Satisfaction of the Elderly", she views friends as a natural support group for the elderly and discusses the importance of friendships "...which deserves further exploration in terms of possible utilization by social service providers".48/

If friendship plays such a vital role in the morale of older people, what can be done to facilitate these relationships? As previously noted, the avenues usually open for meeting people are not available to this target group. This may be due to physical limitations or illness which prevent socialization outside the home.

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48/ Patricia Spakes, "Family, Friendship and Community Interaction as Related to Life Satisfaction of the Elderly" in Journal of Gerontological Social Work, Vol.1, No.4 (1979), p. 292.

The role of the DOROT Friendly Visiting Program is to match older people with others who will become, over time, their friends. The younger person volunteers to go to the older person's home on a weekly basis and a relationship is established. The goal of the relationship is mutuality and volunteers need to be introduced to this concept.

An orientation manual was developed by the author to direct volunteers toward those activities which would facilitate feelings of reciprocity among the two groups. According to exchange theory, satisfaction with the relationship, and therefore continuity, is dependent on the level of mutuality.

Friendship is defined by this author as a mutually satisfying relationship based on trust and caring. Once the match is made by DOROT staff, the agency recedes into the background allowing the relationship to develop on its own. The author believes that the older person, rather than feeling like a recipient of a service, feels like an active participant, which removes the stigma of being a client. The older person knows that the volunteer wants to develop the relationship and feels flattered.

Robert Salmon reports this phenomenon in his article "The Use of Aged Volunteers: Individual and Organizational Considerations". Salmon discusses the benefits to the

older volunteer but also to the client. "Therefore the client's feelings of self-worth may increase because of this gift of self on the part of the volunteer".49/  
This has direct implications for program design and demonstrates the value of using volunteers rather than paid staff.

Another article which discusses the value of utilizing the skills of the elderly is "Matching Helping Roles With the Characteristics of Older Natural Helpers" by Patterson and Brennan. This article deals with the elderly as a natural helper:

...to whom people turn naturally in difficult times because of the concern, interest and innate understanding they possess. The natural helper is not paid for his or her services, does not possess official organizational sanction as the volunteer does, and is marked by the equality and mutual exchange which he or she brings to the act of helping.50/

The elderly can offer understanding and life experience in a relationship with a younger person which is sometimes not appreciated by a peer. This author's study findings support the hypothesis that volunteers feel benefited by their relationship to older people.

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49/ Robert Salmon, "The Use of Aged Volunteers: Individual and Organizational Considerations" in Journal of Gerontological Social Work, Vol.6, No.3/4 (1985), p. 220.  
50/ Patterson and Brennan, "Matching Helping Roles with the Characteristics of Older Natural Helpers" in Journal of Gerontological Social Work, Vol.5, No.4 (1983), p. 57.

These articles represent the viewpoint that the ageing have skills which can be utilized and that they do well in programs which encourage participation. "Most people, including aged people, feel better about contributing to others than they do about receiving help from others."\_51/ There has been a movement to utilize senior citizens in programs such as Foster Grandparents and Senior Corps for Retired Executives. These programs encourage the older person to give services to others for two reasons: first, it utilizes the expertise which older people have and, second, it raises their own feelings of self worth. For many older persons, participation in a program outside the home is not possible due to their physical limitations. For this group of elderly people, our target population, friendship can serve many of the same objectives.

Cohen and Rajkowski criticize many of the studies on friendship in their article "What's in a Friend? Substantive and Theoretical Issues." They state that investigators often use the category of friend in questionnaires and interviews without determining whether the concept is relevant or how the population being studied may interpret the word. The authors believe that friendship must be understood

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51/ Robert Salmon, "The Group Experience" in Journal of Jewish Community Service, Vol.46 (1969-70), p. 250.

within a particular cultural and temporal setting, and on the basis of underlying social relations. They conclude that future research must delineate which components of social interaction (e.g., content of exchange, affectivity, frequency, directionality, etc.) underlie the concept of friendship within a particular study population.

Roberto and Scott analyze equity in friendship in their article "Friendship Patterns Among Older Women". They reiterate the importance of friendship to this population in helping a person sustain a sense of usefulness and self-esteem. Friendship is more effective than filial relationships because it rests on mutual choice and mutual needs between equals.<sup>52/</sup> The authors cite equity theory as their theoretical base, which suggests that individuals become distressed when they find themselves participating in an inequitable relationship. The more inequitable the relationship, the greater the effect on the morale of the individual. It was assumed that morale would be affected if the balance of the relationship was tipped in either direction.

Study findings by Roberto and Scott confirmed that

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52/ K.A. Roberto and J.P. Scott, "Friendship Patterns Among Older Women" in Journal of Aging and Human Development, Vol.19, No.1, (1984-85), p. 1.

equitably benefited women had a higher mean morale score than women who were receiving more help. What was unanticipated was that women who were giving more help than they were receiving also had a higher mean morale score than those who were receiving more help. The authors offered several possible explanations for their findings, the best of which involves social exchange theory. This theory suggests that the rewards the older woman receive, less the costs she has incurred from her friendship, will determine her satisfaction with the relationship. Expectations are an important variable in terms of reciprocity:

Although the friend may not be providing assistance to the older women, the friend could be providing rewards for her in terms of a different function within the role of a friend. The friend relationship itself may be very rewarding for the older woman even though mutual help is not part of the relationship.\_53/

The authors conclude that more research is necessary in order to guide a revision of equity propositions to better understand the effects of giving and receiving help on the morale of the older person.

Sarah Matthews, in her article "Friendship in Old Age: Biography and Circumstances", examines the lack of institutionalized criteria to determine the existence of

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a friendship. Validating the existence of a friendship requires a subjective evaluation of the relationship by at least one of the participants. The author cites a study done by Lillian Rubin in which Ms. Rubin attempts to verify the subjective evaluations of her informants. She found that the relationship was not always viewed as mutual by both parties, although the informant believed it to be reciprocal. The question raised is whether the belief that there is reciprocity is more critical in the relationship than the reality. Unless the friendship is tested and found wanting, the subjective evaluation is all most people have to measure a friendship.

Exchange theory specifies that a relationship will continue as long as both parties feel that rewards outweigh costs. This means that each person is getting and giving what he/she wants. The exchange does not have to be equal, but should be equitable. Although friendship and its relative success is subjective in nature, it can be considered to be a valid social exchange if based on a perception of mutuality and reciprocity between two parties.

#### Role of Volunteer

The role of friendship is important in reducing the isolation and loneliness of older people. Many elderly people have received traditional casework services from

professionals in part because other, more appropriate, services were not available. This author feels that many older people used their social worker to relieve their loneliness rather than as a therapist or to solve concrete problems. The weekly visit from the social worker often resembled a friendly visit, with the older person attempting to engage the social worker in conversation, often about the worker's own life. This is not to say that all professionals found themselves in this position but that, in many cases, the relationship was altered by the needs of the older person.

According to the United States Department of Commerce, Bureau of the Census report, there is a large population of over-age-75 women who live alone.<sup>54/</sup> This population lacks social interaction and often feels isolated and lonely. The way in which organizations which deliver services to this population try to meet this need is a function of the agency philosophy, available resources and political environment.

Due to cutbacks in funding, many agencies have tried to use volunteers to supplement their professional staff.

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54/ Bernice Neugarten in Age or Need, Public Policies for Older People (Beverly Hills: Sage Publications, 1982) p. 39.

Although volunteerism is not a new concept, it now has additional appeal due to the economic conditions imposed by the fiscal austerity plan of the Reagan administration. Volunteers who visit the elderly on a weekly basis can gather important information which can then be passed on to professionals for evaluation. This can be very cost effective as the supervision of a volunteer is significantly less expensive than a salaried professional. A brief review of the history of volunteerism in this country would be helpful in understanding the current movement.

Karl in "Lo, The Poor Volunteer", characterizes the volunteer as distinctly American in fundamental value and as a part of the American way of life.<sup>55/</sup> The early social welfare movement was carried out by friendly visitors who gave aid and assistance to the needy. Around 1800, training degrees and state certification began to replace apprenticeship, and paid agents represented official organizations. Professions were regulated by local and state government, reflecting the view that the federal government was not responsible for social welfare. In the late 1800's, volunteers began to play a greater role in fund raising for organizations, with professionals actually

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55/ Barry D. Karl, "Lo, The Poor Volunteer: An Essay on the Relation Between History and Myth" in Social Service Review, (Vol:58, No.4, 1984), p. 493.

delivering the services. This became clarified during World War I, when private foundations raised money for war-bonds, Red Cross and for general public use. In the early 1930's, Herbert Hoover attempted to mobilize the volunteer effort to help the unemployed by providing community services for the poor. This effort failed and the New Deal utilized these previously unpaid workers as government employees to implement many of the same services they had previously provided as volunteers.<sup>56/</sup> Karl points out that the term "volunteers" refers at times to the character of the service provided, sometimes to the individuals who provide it and sometimes to the sources of funding.

Karl attributes the origin of the volunteer as related to religious concern with free will and service to the church. Providing a service without monetary compensation and acting without coercion have been part of the volunteer concept from earliest times. Volunteers still retain traits which set them aside from professionals. They are able to give the gift of time which is often seen by clients in a different light than services by paid employees. Volunteers should not take the place of professionals, but in many instances they are able to provide a variety of services in a different way than paid agents. Programs

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56/ Ibid., p. 504.

such as a Friendly Visiting Program rely on volunteers because of fiscal restraints but, in actuality, volunteers are better able to carry out the program's objective of validating the importance of the elderly person. The homebound elderly feel worthwhile that someone cares enough to spend time with them without compensation. This should increase their self-esteem by helping them feel that they are making a contribution to the life of another person. Therefore, a program which utilizes volunteers provides better opportunities for reciprocal relationships than a traditional social service program.

Volunteerism has become a popular theme for voluntary agencies that cannot afford a large social service staff. A problem of using volunteers is their lack of accountability to the agency and the difficulty of determining exactly what they do while in the field. Training of volunteers becomes a critical issue for organizations. Most agencies are so elated to get a volunteer that they hesitate to place heavy training demands on them. Social work agencies need to do a through assessment to determine whether the older person would benefit from a Friendly Visiting Program or a more intensive social work intervention. Supervision of volunteers should be continued as circumstances can change and alternative services may need to be considered.

For organizations to maintain their goals and objectives

in serving the elderly, volunteers must necessarily be incorporated into the agency structure. The next chapter examines how one agency developed a program of friendly visiting despite their budgetary and staff restraints.

CHAPTER IV  
DOROT FRIENDLY VISITING PROGRAM

Introduction

The concepts of mutuality and reciprocity have been examined as related to exchange theory and to the ageing. A program incorporating theory and practice in these areas is Project DOROT. It was founded in 1977 by young professionals and university students who identified a population in need and decided to provide innovative services. The population is comprised of elderly men and women living on the West Side of Manhattan, New York. Most of this group is Jewish of European background living in transition neighborhoods from white middle-class to minority, mainly Hispanic and Black. Some older people felt uncomfortable walking around in their community and others were unable to get out due to physical limitations. Project DOROT, through program planning, identified new ways to address the emotional, social and cultural needs of this population.

The large majority of older people known to DOROT are lonely and isolated due to ill health and/or circumstances of living. Many of these people are not known to social service agencies because they are not receiving financial assistance or are too proud to ask for help. University students began to develop relationships with some of their

older neighbors. Through word of mouth these students came into contact with many other older people and began to match them with fellow students who had shown an interest in forming relationships. DOROT Friendly Visiting Program has a staff of four social workers. Although DOROT is interested in program evaluation and monitoring, their staff does not have time for in-depth research. They must rely upon outside sources for analysis of program impact. DOROT was pleased to participate in this study for two reasons. The first is that although the program is successful they have not been able to quantify what the interaction is between the elderly and the DOROT "friend" and what the elderly person actually gets out of the relationship. The second reason pertains to funding and the hope that documentation will be helpful in receiving grants.

Project DOROT describes itself as a Friendly Visiting Program" which

...matches a volunteer or a family with an isolated, lonely older person. They meet together once a week for a minimum of one hour, and share life's experiences or a game of cards, a ballet on TV or just a few precious moments together. The volunteer takes on a big and rewarding responsibility when entering into a relationship with an older friend. For many of these elderly their DOROT visitor is their only human contact all week. \_57/

### Impact On Older Person

Services may be requested by older people in the community, relatives or neighbors. A social worker interviews each person in their home to determine if a Friendly Visiting Program is appropriate and explain the underlying principles of the program. Older people who are judged to be incapable of carrying on a reciprocal relationship due to mental handicaps are screened out. A brief history is taken with an emphasis on eliciting strengths and weaknesses as well as interests and hobbies. The worker then matches the older person to a volunteer and sets up the initial visit. The professional tries to determine what the older person would like to get out of the relationship (e.g., friendship, companionship, conversation, sense of caring, etc.). Often the older person is unclear about his/her motivation and will remain flexible about the relationship. Limitations of the relationship are discussed such as physical handicaps and time constraints so that expectations will not exceed reality. Areas of mutual interest are introduced as well as possible activities which can be shared. The concepts of mutuality and reciprocity are discussed in terms of concrete tasks and emotional components.

In effect, DOROT is initiating and supporting a network of primary group relationships which are important in maintaining older people in their homes. Although some

older people already have active families, for many others the volunteer is their only link to the outside world.

An example of mutuality involves an older woman who is completely immobilized by multiple sclerosis and is visited by a younger volunteer. The older person cannot participate in any activities, share food or go anywhere with her friend. She was however, a concert violinist and is able to share her knowledge and expertise with her friend who is very interested in music. On the surface it would appear that this older woman could not participate in a mutual relationship but this is not the case. The woman feels that she is contributing to the friendship which makes her feel better about herself, and the volunteer feels she is getting something as well.

Another example is an older woman who is visited by a young man. Prior to her participation in the Friendly Visiting Program she felt lonely and depressed. The young man visited weekly and shared his life experience with his friend. The older woman felt included in the world and was able to feel an interest in other people again. She now would like to meet other people and become more socially active because she feels cared about and feels she has something to offer others. She now feels that her friendship is of value and is ready to make new friends.

A third involves a woman in her sixties who was lonely and isolated because she does not know how to meet people and has limited financial resources. Her younger friend has introduced her to her own friends and the older woman is often invited to concerts or dinner with a circle of younger people. She thoroughly enjoys the contact with her younger friends as well as the social activities they offer her. She feels that her life experiences are of interest to her new friends and that the relationships are based on mutuality.

In case number three, the woman feels her volunteers are like peers who enjoy her company. She therefore has a real sense of mutuality based on the sharing of sentiments. This contrasts with the first example of the violinist who feels she has something concrete to offer, namely her expertise. She is giving a service to her younger friend which develops into a friendship.

There are many opportunities for each relationship to develop into a friendship. All relationships are unique but require a give and take, sense of commitment and feeling of mutual caring. In all three examples, the older person felt that their life experience, or more accurately their "selves", were of worth to another.

Project DOROT finds volunteers through outreach to universities and community groups as well as word of mouth. People are interviewed by professional social workers to discuss his/her needs and interests. Orientation and training take place during this interview. Also during this initial meeting, staff try to familiarize the volunteer with DOROT policies and information related to the process of ageing. From a list of elderly waiting for a visitor, the volunteer is able to choose who he/she would like to visit. The social worker helps the volunteer to pick someone who seems to be compatible in terms of interests, hobbies or background. For the first visit, the staff person makes the initial phone call to the older person, sets up the appointment and accompanies the volunteer.

After the initial orientation with the agency, the volunteer is required to fill out a monthly report form and attend at least two training sessions a year. The monthly report aids the agency professionals in keeping abreast of events and/or changes. Training sessions are held on an informal basis where volunteers are encouraged to share their experiences with others as well as hear from guest speakers on topics of interest. Although contact between the volunteer and agency is encouraged, the primary source of training occurs during the one session orientation. Therefore, a comprehensive training manual could be of

great importance to this type of program and accordingly, one will be presented by this author. For example, a training manual could be used as a reference guide when problems arise and as a source of information for routine matters. It would also serve as a written reminder of the program goals and philosophy of Project DOROT.

The DOROT Friendly Visiting Program has 4 full time social workers on staff to cover 202 matches of older people and volunteers. There is a waiting list of 20 to 24 elderly who have been referred by other agencies, and an additional 20 to 25 older people who have been interviewed and are waiting for a match. Waiting lists are dependent upon available volunteers as well as the ability of social workers to take on higher case loads. The low number of social workers employed by Project DOROT is related to budgetary constraints.

The Friendly Visiting Program is able to function with minimal staff and overhead making it very attractive in this climate of social service cutbacks. The program could be easily duplicated in a variety of settings including religious organizations, community groups and social service agencies. Since services are offered in the homes of the aged a large physical plant is not necessary. The program could be carried out in either an urban or rural setting

with minor modifications. Before duplicating a program it is important to understand what elements make it successful.

Project DOROT began in 1977 as a Friendly Visiting Program and later expanded to include intergenerational programs, holiday food package deliveries, telephone reassurance and a homeless prevention project. These additional services were a result of community needs and resulted in a diversity of funding. Project DOROT receives support from The Federation of Jewish Philanthropies, the Community Development Agency, the Department of the Ageing, the Federal Management Agency, foundations, corporations and individual donations.

The DOROT Friendly Visiting Program is based on generations helping generations through emotional support. The name DOROT means "generations" in the Hebrew language. The program provides a link between older isolated people and the outside world through a volunteer friend. It does not address the overall societal barriers but concentrates on the one-to-one relationship. In many cases, the volunteer is the only visitor the older person has all week.

#### Study Methodology

The research instrument used in this exploratory study was an original questionnaire utilizing the interview format (see Appendix A). It elicited a self-report from the older

person and the volunteers as to how they felt about the relationship, specifically whether they felt the relationship was reciprocal. Questions were asked which related to concrete tasks, topics of conversation, as well as feelings. The author tried to determine, through the responses, whether one party felt that they were giving or receiving more than the other as well as what concrete services were being exchanged. One assumption of exchange theory guiding this study was that if each pair felt they received as much as they gave that a true social exchange was taking place.

This author asked questions relating to concrete tasks such as what activities took place and/or topics of conversation during the visit. Both the older person and the volunteer were asked who initiates the conversation/activities in order to determine if the relationship was balanced. Additional questions were asked which elicited the emotional commitment of the parties as well as judgements as to how the other person viewed the relationship.

#### Goals of the Program

It is the author's contention that when older people are involved in a mutual exchange of goods or services with people of other generations their morale and self-esteem are raised. It is also the author's contention that those relationships which are based on mutuality will be more

satisfying to the older person than those in which there is a power dependency. The author feels that some of the benefits which have been documented for volunteers could be realized by the elderly in a friendship. According to Monk and Cryns in "Predictor's of Voluntaristic Intent Among the Aged " the volunteer receives non-income benefits such as status-enhancement, self-justification and morale value expression. Volunteerism addresses some of the common problems of ageing caused by loneliness and instills a feeling of continued usefulness and self-respect. For the home-bound elderly, participation in a relationship based on mutuality may satisfy some of the same needs that volunteer services address for the more mobile ageing. Although much research has been done on examining the motivation and rewards obtained by volunteers, little is known about the feeling of the elderly involved in the service.

#### Scope and Feasibility

The project involved interviews of 25 elderly people who have participated in the DOROT Friendly Visiting Program for at least one year. There are at present 175 on-going relationships in the program with 75 who have participated for at least one year with the same volunteer. Many of these elderly have more than one "friend" visiting them each week. Interviews were drawn from the sample of elderly who have had one volunteer visiting them for at least a

year.

The 25 interviewees were randomly selected from the pool of 50 relationships. Each person received a telephone call from the researcher explaining that DOROT is conducting research about the Friendly Visiting Program and requesting their participation. When the person agreed to the interview an appointment was made for the following week for the researcher to come to his/her home. The researcher asked questions from a questionnaire form which included a combination of open-ended questions, agree/disagree questions and questions related to demographics.

The personal interview was selected for several reasons. The first reason relates to possible physical limitations of the elderly population in reading a questionnaire due to poor vision. Some people might tire from a long questionnaire and lose interest. In other cases illiteracy could be a problem. The second reason this type of instrument was chosen is that it allows the interviewer a more informal visit with the older person and allows them to talk about their relationship with their "friend" in a more personal way. The visit itself becomes more in keeping with the DOROT philosophy. Thirdly, this format allows the interviewer to encourage the elderly person to go into detail or give more in-depth answers, which is appropriate in an exploratory

design.

The different styles within the questionnaire allow the researcher to ask some questions which can be easily coded without losing information which can be gathered by open-ended questions. The format also helps the interviewer to keep the elderly person focused by eliciting short responses (ex. agree/disagree) but also allowing some story telling when appropriate. The method of self report is used rather than more objective measures for several reasons. Self-esteem is usually defined as a general sense of self-worth. The objective factors cannot capture a person's feelings about him/herself as has been demonstrated by much research. A person's sense of self value can only be measured by asking them. Similarly socio-economic factors can be measured objectively but do not necessarily reflect the person's view of his/her situation. The author was more concerned with the elderly person's view of their financial status and health as a measure of his/her morale.

#### Social Work Principles

Although services are delivered primarily by volunteers, social work principles play an important role in the program. Volunteers should be aware of agency philosophy as it relates to clients. An important concept is the preservation of the dignity of the client. This relates to independence versus dependency and volunteers should be made aware that

each person needs to exercise as much control over his/her life decisions as possible. Another principle relates to maximizing opportunities for personal growth and development by providing opportunities for the older person to express him/herself. This may take the form of acknowledging past experiences as important or listening to stories which may validate the life of the person. Respect can be shown by keeping appointments, promptness and other common courtesies.

Self-esteem is based on a general sense of self-worth. Self-esteem is developed and maintained through a process which allows the person to successfully negotiate his environment and his personal interaction. As a person ages he will probably have less success with his environment (retirement, lower income, physical handicaps, etc.) and have fewer personal interactions (death of loved ones, physical isolation, etc.). Therefore it is logical to assume that his self-esteem will be lowered. In addition, the traditional social service programs may have unintended detrimental effects on the older person by creating a negative image of neediness or helplessness. This project focuses on the positive interaction of two people involved in a friendship. The concept of mutuality is examined through exchange theory as a viable intervention for the elderly.

CHAPTER V  
DATA ANALYSIS

Introduction

Data collected through interviews with the 46 participants of the DOROT Friendly Visiting Program will be analyzed by reviewing personal characteristics of both the older people and the volunteers and examining the content of the visits as reported by both groups. The review will include the expectations and resulting realities of individual relationships as well as differences in responses between the older people and the volunteers. In this way the author hopes to address the issues of perceived mutuality and the pertinence of exchange theory to the field of ageing and service delivery.

Personal Characteristics of Older People

The author interviewed twenty-five older people, 22 females and 3 males who are currently participating in the DOROT Friendly Visiting Program, ranging in age from 60 years to 94 years with a median age of 80. Fourteen people were age 80 or above.

The sample had been involved in the Friendly Visiting Program for an average of 2 years with a wide range of individual participation from 3 months to 6 years. Eleven older people had been involved with DOROT for 2 years or longer and the remaining 14 for less than 2 years. The range for participation with the current volunteer also ranged from 3 months to 6 years, with the average relationship being 1½ years.

Only 4 people were seeing a different volunteer than they did when they started the program. Of the 3 older people who had been visited the longest, however, only one was with the original volunteer.

Fifteen participants had been with the same volunteer for at least 1½ years and 8 had relationships of more than 2 years. Twenty percent had been friends for less than one year, the original criterion for the sample. These people were inadvertently included in the study due to administrative errors in sample selection.

TABLE 1

DEMOGRAPHIC INFORMATION FOR OLDER PEOPLE

	Age	Sex	Marital Status*	Time with DOROT	Time with Volunteer
1	85	F	W	2 Yrs.	2 Yrs.
2	82	F	S	1½ Yrs.	1½ Yrs.
3	72	M	M	5 Yrs.	1 Yrs.
4	81	M	D	2 Yrs.	2 Yrs.
5	80	F	W	1½ Yrs.	1½ Yrs.
6	87	F	W	6 Mo.	6 Mo.
7	73	F	W	2½ Yrs.	9 Mo.
8	93	F	S	1½ Yrs.	1½ Yrs.
9	79	F	D	1 Yr.	1 Yr.
10	85	F	W	8 Mo.	8 Mo.
11	88	F	W	6 Yrs.	6 Yrs.
12	84	F	W	1 Yr.	1 Yr.
13	66	F	D	2 Yrs.	2 Yrs.
14	91	F	W	1 Yr.	1 Yr.
15	73	M	W	1 Yr.	1 Yr.
16	70	F	S	1½ Yrs.	1½ Yrs.
17	94	F	W	3 Yrs.	3 Yrs.
18	**	F	W	3 Mo.	3 Mo.
19	69	F	S	4 Yrs.	4 Yrs.
20	80	F	S	2 Yrs.	2 Yrs.
21	85	F	W	1½ Yrs.	1½ Mo.
22	**	F	D	3 Yrs.	5 Mo.
23	79	F	W	5 Yrs.	3 Yrs.
24	60	F	W	1½ Yrs.	1½ Yrs.
25	90	F	W	1½ Yrs.	1½ Yrs.

NOTE: \* - W=Widowed; M=Married; S=Single; D=Divorced  
 \*\* - Refused to answer question

Self Report Demographics

Because of the religious affiliation of the agency, 23 out of the 25 participants were Jewish. Twenty-four of the the elderly participants lived alone, the other was married. Fifteen were widowed, five were single and four divorced. Three older people had 24 hour homemaking services due to ill health. All had work histories and most had worked all their lives. Three people had completed

a grammar school education, two junior high school, eight high school, six attended college and four had at least a Masters Degree.

Reporting on their own financial status, nine older people felt it was good, eleven felt it was fair and four felt it was poor. In measuring their physical health, two thought it was good, twelve thought it fair and eleven thought it was poor. Six felt their level of mobility was good, three felt it was fair and sixteen felt it was poor. Two of the sixteen were completely immobilized by multiple sclerosis. Seventeen participants felt their hearing was good, three felt it was fair and five felt it was poor. Fourteen people rated their sight as good, five rated it as fair and six rated it as poor. In a self report of mental health, eighteen people felt it was good, six felt it was fair and one person rated it as poor.

TABLE 2

SELF REPORT			
	Good	Fair	Poor
Financial status	9	11	4
Physical health	2	12	11
Mobility	6	3	16
Hearing	17	3	5
Sight	14	5	6
Mental Health	18	6	1

Physical health and mobility seem to be of greatest concern to this population. This is understandable as they are primarily homebound. Hearing, sight and mental health are rated high. These traits impact concretely on a relationship and may have more influence on the ability to engage in a mutual exchange.

DOROT tries to provide a service to isolated older people on Manhattan's West Side. Criteria for acceptance into the program include a stated or apparent need, geographic location and the ability to participate in a relationship. According to the self report, nine persons had frequent contact with their own families, six had occasional contact and ten had no contact at all. Six people had other visitors on a somewhat regular basis, (at least 4 times weekly), and eleven had occasional visits. Eight saw no one but their DOROT friend.

TABLE 3

FREQUENCY OF CONTACTS			
	Frequently	Occasionally	No contact
Family contact	9	6	10
Contact with others	6	11	8

NOTE: Excludes DOROT and paid employees

Many of the older participants are totally dependent on the Friendly Visiting Program to provide human contact.

Sixty-four percent of the people interviewed had little or no contact with their family and 76% had little or no contact with friends.

#### Long Term Relationships

For a relationship to continue, it must be satisfying to both parties: this is an essential aspect of exchange theory. Two of the 3 older people continued in the program for 5 years, although not with the same volunteer. In these examples the primary tie is with the agency rather than the individual volunteer.

One man saw his volunteers for about one to two years each. He enjoyed the stimulation of new people and was able to start a new relationship easily. His volunteers, drawn from a student population at Columbia University, also seemed to enjoy the stimulation of the relationship. The man did not mind the turnover and utilized his friends for more concrete purposes than did most other people in the program. He lost his vision in recent years, but maintains an active social life and is living with his wife. He now writes short stories and journal articles. Having someone visiting weekly does alleviate his isolation, although the volunteer does not serve as his only link to the outside world. In addition, the volunteer does the concrete task of transcribing his articles from tape to written page.

The older person feels that he shares his life experiences which are of interest to the volunteers.

Another woman who has had the same volunteer for over 5 years sees her friend as needing her more than she needs the volunteer. This older person works every day in an unpaid job and feels she has more than enough social contact. The relationship has changed over the years, principally because the volunteer is now married. As a result, the older person feels that she is not needed as much, which is a comfort to her. This older person feels that she gives more than she receives, but finds the relationship rewarding nonetheless. This is compatible with exchange theory which states that a person will continue in a relationship as long as the rewards outweigh the costs.

The third woman who has been in the DOROT program for 5 years expects to start a relationship with her third friend soon. The author does not know why the first relationship ended but did interview the second friend. This volunteer reported that the older person had become progressively more demanding and difficult to be with due to constant complaining. The author did notice this during the interview with the older person. The volunteer has just terminated the relationship after 3 years and DOROT is looking for a replacement. It is not clear whether

this older person finds the relationship rewarding or is simply desperate for someone with whom she can talk.

These three people are getting something out of the relationship although it is clearly not the same thing. One person is receiving concrete help, the second is giving comfort to another and the third person has someone with whom to share her problems. As mentioned previously, a person will continue a relationship as long as the rewards outweigh the costs. In the case of the woman who was too demanding, the costs outweighed the rewards for the volunteers and they terminated the relationship. Therefore it can be assumed that needs are being met by the performance of concrete tasks, by the desire to be useful to someone else or through the need for companionship. Each person was able to extract from the relationship what was important to him or her.

#### Frequency of Contacts

The program is designed for weekly contact and 19 of the 25 older people were visited on a weekly basis. Some of the people with the more sustained relationships had altered this schedule to accommodate a volunteers' work schedule or marital status. These changes seem to reflect needs of one party which were negotiated and accepted by the other person.

Of the six older people not visited regularly, two specifically requested this irregular contact. These two women were among the youngest and most active of the program and preferred spending an evening out with their friend at a movie, concert or dinner to just visiting at home for an hour or two. Neither woman had other friends that they saw regularly and only one had family in New York. Both women objected to the visits as a scheduled "duty" or "job" and preferred the spontaneity of social outings even if these were less frequent. The volunteers were both willing and able to change the nature of the visits to keep the exchange balanced.

Two of the relationships changed due to new demands on the volunteers' time; one has gone back to work and the other recently had a baby. The older persons seem to have adjusted to the less frequent visits and view the problem as one of time rather than commitment. The relationships seemed to be well established before the visits were diminished and a sense of well being about the friends seems to continue.

The two other relationships in which the volunteers are not able to visit regularly are relatively new, 3 months and 1½ years. In both cases, the older people have expressed

some displeasure about the lack of regularity and the relationship has not progressed on an emotional level. Both women are pleased with the relationship but do not feel an emotional commitment either for or by their friend.

#### Content of Visits

Older people were asked to rate the quality of their relationships with their visitor. Nineteen felt it was excellent and 6 felt it was good. The majority of visits are scheduled ahead of time and are consistent for day and time. Seventy-six percent meet weekly and visits seems to follow the same pattern each week. Older respondents report visits as follows:

"If weather permits we go to the park and talk. If weather is poor we stay in the house and talk".

Most visits take place in the older person's home. The average length of a visit is 1 hour and 15 minutes although 40% of the visits lasted over 1½ hours. Most older people described the visits in terms which represent a high degree of mutuality:

"Pleasant, exchange of confidences."

"Talk about each other's week."

"Talk about each other's family."

"Ask about his/her job...sit and talk."

"Comes in and sits down and talks. Talk about problems, relate well to each other."

"She tells me about the interesting things she has done."

Sharing of food also represents a high degree of reciprocity. Two-thirds of the visits include an exchange of food, usually tea, cookies or ice cream. This is usually provided by the older person but some volunteers routinely bring cookies or doughnuts with them.

TABLE 4

FOOD EXCHANGE		
	Number	Percentage
Share food	8	32
Provided by volunteer	2	8
Provided by older person	7	28
No food exchanged	8	32

Volunteers usually ask if they can bring anything for the older person, but only 28% of the older people allow their friend to help with errands. This may be because the older people are able to reciprocate in this area. Most of the older people preferred to ask relatives or paid employees to do errands for them. Most visits are ended by the volunteers due to their schedules and often the older person reminds them when it is time to leave. Terminating the visit does not seem to present a problem for either party, although a few volunteers expressed guilt at having to leave their friend alone. Time was usually not a main consideration during the visit, with people responding as follows:

"When we feel we have had enough or we have finished our business we end the visit."

"We talk about history and other things, we don't look at the time".

"We both know at the end of the hour that she has to go."

"When we feel we have had enough, we end the visit."

"Visit ends because (volunteer) has to go back to work."

It seems the relationship is more balanced when both parties share the termination process.

One relationship was established on a counseling or therapeutic basis in which the volunteer spent exactly one hour with her "client". In this relationship the volunteer listened to the older person's problems as part of a graduate school requirement. This was arranged between the volunteer and DOROT staff and seems to reflect the need of the older person for therapeutic intervention. The older person described the visit as follows:

"The visit is the same time each week. We don't speak on the phone unless there is a specific reason. She sits opposite me in the living room. I usually have something to complain about so I start talking...she stays one hour...she tries to be helpful and understanding."

The older person responded that she did not consider the relationship to be mutually rewarding. She did feel that she had something to offer her friend and that her friend

got something out of the relationship. This woman has no other visitors or family and was one of the few responding who felt dependent on her friend. Although the individual needs of both parties were being met, the author does not feel that a mutual exchange occurred. Both the volunteer and older person confirmed this in the interview.

Other atypical visits included relationships which had changed to reflect the needs of one or both parties. One involved an older person who preferred spending an entire afternoon or evening going to concerts or dinner with her friend. This pair met twice monthly rather than weekly. Other visits reflected long term relationships which had become more informal, with less frequent visits but continuing deep concern for each other.

Older people were asked what they talked about with their "friends". Ninety-six percent discussed their personal lives, 88% discussed family issues, 76% discussed past experiences, 72% discussed current events, 68% discussed cultural events, 60% gave advice to each other, 56% discussed health related problems, 48% discussed loneliness, 48% discussed religion, 36% discussed generational differences, 36% discussed death and 28% discussed fears that either party might have. In general, people felt their conversations reflected present day problems and/or issues of concern

which they would discuss with a friend of any age.

Older people were asked if they did anything other than talk with their friend. Sixty-four percent ate either snacks or meals with their friend. A few went to restaurants for special occasions like birthdays. Forty percent went for walks when the weather permitted. Thirty-six percent had visited each others family or friends, 32% had attended social events together such as concerts or theater, 28% of the older people asked their friend for help in doing errands for them. Only 24% had attended DOROT events together, 16% had done some shopping and/or reading together, 8% had played card games and 4% had volunteers help them with letter writing. Going places together and meeting each other's families seems to show a closeness which may be representative of familial relationships.

When asked about the most important thing people did with their friend, 48% reported talking, 20% said companionship, 12% felt that friendship and/or caring was primary and 4% reported either encouragement or physical help as being most important. Typical responses included the following:

"Talking about common interests."

"We have a very pleasant exchange of conversation."

"Exchange confidences."

References to companionship included the following:

"Most important thing is that she comes...company."

"Being together."

"Personal contact."

Many older people felt that the friendship and caring attitude was most important:

"She's a friend, I don't use her I enjoy her."

"Understanding of each other and situations."

"When she calls me I am happy."

All reports were about pleasant experiences with varying degrees of intensity. Regardless of what was considered to be the most important aspect of the relationship the above comments represent a very high degree of mutuality and reciprocity.

#### Expectation and Realities of Relationships

All older people were asked what their expectations were when they were first introduced to the DOROT Friendly Visiting Program. Thirty-two percent had no expectation and another 32% were not sure what to expect from the relationship. Sixteen percent expected friendship, 12% expected some type of physical help and only 8% expected companionship. Some of the responses including the following:

"Didn't expect much from the relationship. I made a real friend and I didn't expect that."

"I felt it would be nice to have someone visit and chat, learn about other people's interests."

"I didn't expect anything. I was happy that someone came. I didn't have anyone at that time."

Low expectations on the part of the older people may be one reason why so many people are pleasantly surprised when the relationship works out and why the older people are willing to adjust to changes in the relationship.

These expectations can be compared with what older people reported they were getting out of the relationship. Seven felt that they were cared about, 6 felt that the visit brightened their day and alleviated loneliness, and 5 people reported friendship as the primary product of the relationship. Three people mentioned interesting conversation, contact with the outside world and an exchange of generations. Two reported getting physical help and 1 person mentioned companionship. One person mentioned a sense of helping others and one felt nothing was gained from the relationship. People responded to this question with a great deal of intensity, including the following:

"I'm so much looking forward to her visits. It's nice to talk to a young person."

"Cheers me up. I was very depressed. He saved my life."

"I feel like I have a young person who values my advice."

"The daughter I had wanted. She makes me feel wonderful. She loves me."

"Feel like I'm still part of the world."

"I get a lot. I know that I have a friend, that's the most important thing."

"Feel a warmth and an understanding."

Many of the responses represent a mutuality that the older people feel are part of the relationship.

Eighty percent were able to identify something they felt they had given to their volunteer in the relationship. Typical responses represent a high degree of mutuality:

"I think she likes to visit me, she finds me interesting. She's very conscientious about visiting so she must get something."

"She enjoys the openness. She probably gets the same reaction I do, that I like her, that she's a great person."

"She says she feels we are friends and that sums it up."

"She loves to listen to me."

"She likes me, thinks I'm an intelligent person."

"Must give her some pleasure to be charitable. She says she feels lucky to know me, enjoys my company."

Other responses show some confusion about the relationship, such as the following:

"I don't know what she get out of the relationship. Maybe she feels good about visiting an old lady."

"I assume it's something she wants to do for mankind and I'm a representative of it."

When asked what they thought their younger friend might be getting out of the relationship, 20% did not know.

Twenty percent reported friendship, 20% a sense of helping others, and 20% interesting conversation. Twelve percent felt that their friend received a sense of caring from the older person and 8% thought they received an exchange between generations. No one felt that companionship or loneliness played a part in their friend's visitation. The 20% who did not know felt that they were giving something to their friend but did not know what. All felt that an exchange was taking place, even if it could not be clearly defined.

When asked if they are getting what they want out of the relationship, 92% responded yes and 8% responded negatively. Most responses represented a lack of expectations and a gratitude for whatever they received, e.g.:

"Can't expect more."

"Getting as much as can be expected."

"Satisfied with the relationship because I have no expectations."

"Would like to see her more often but can't expect it."

Some older people expressed surprise at the quality of the relationships, e.g.:

"Getting exactly what I want. Relationship is far beyond my expectations or hopes."

"Didn't expect much from the relationship. I made a real friend and I didn't expect that."

"Would like to get what I got - a young devoted friend."

"I love her company. She's a friend, a true friend and that's what I want."

Negative responses were related to the amount of time invested in the relationship, e.g.:

"Only one hour a week. Can't develop too much in that time."

"Visit could be longer."

Although a few people felt the relationship could be better, none wished to terminate their visits or request a change of friends from DOROT.

Several people expressed an interest in having more people visit them, since they found the visits very stimulating and helpful in alleviating their loneliness. All interviewees praised DOROT staff and the service that was offered.

When older people were asked how long they anticipated the relationship to continue, 80% responded indefinitely. This desire for continuity is part of exchange theory which states that a relationship will continue as long as it is more rewarding than costly to each party. The answers were qualified in that circumstances might change the nature of the relationship but would not end it.

Three older people felt the relationship would change if their friend moved and three felt that marriage might make a difference in the amount of time their friend could

spend with them. One older person said she might move and another felt she might become too ill to continue the relationship. Two felt their younger friend might not have the time in the future to devote to the friendship. When asked if they would start another relationship through DOROT if this one ended, 84% responded affirmatively, 4% said no and 12% were unsure. This represents a high degree of commitment to the agency and the program which most older people verbalized in other parts of the interview.

The eight people who saw no one but their DOROT friend did not present different responses than the other people who were interviewed. Levels of expressed loneliness and/or dependence remained about the same as those people with more frequent outside contacts. This may reflect the different levels of need among individuals for companionship. The literature points out the need for intimacy with at least one person, although some people desire a larger circle of companions.

#### Personal Characteristics of Volunteers

Twenty-one out of the original sample of 25 volunteers were interviewed. Four volunteers could not be located or did not respond to the author's inquiries. One volunteer was out of the country and the other 3 did not return the authors numerous messages. It is speculative to assume

that these volunteers may be less committed to the program. The age range for volunteers was between 21 and 75 with the average age being 37. Eleven people were under age 30, 5 were between 30 and 40 and 5 were over 50.

Originally, volunteers were drawn from a student population, but in recent years recruitment efforts have expanded to community groups and religious organizations. Word of mouth also continues to be a successful method of reaching new volunteers.

Nineteen out of the 21 volunteers interviewed were female, only two were male. The range of participation in the DOROT program was between 6 months and 7 years. Excluding the person who participated for 7 years, the average length of participation in the program was 2 years with an average of 21 months with the same older person.

Twelve people had participated in DOROT for under 2 years with 9 people participating over 2 years. Eight volunteers had been visiting the same older person for over 1½ years as opposed to 13 volunteers who had visited for under 1½ years.

TABLE 5

DEMOGRAPHIC INFORMATION FOR VOLUNTEERS

	Age	Sex	Time with DOROT	Time with Older Person
1	29	F	1½ Yrs.	1½ Yrs.
2	75	F	1 Yr.	1 Yr.
3	22	F	1 Yr.	1 Yrs.
4	30	M	1½ Yrs.	1½ Yrs.
5	38	F	4 Yrs.	2 Yrs.
6	*			
7	57	F	2 Yrs.	2 Yrs.
8	*			
9	30	M	4 Yrs.	1½ Yrs.
10	50	F	1½ Yrs.	1 Yr.
11	*			
12	25	F	2 Yrs.	1 Yrs.
13	24	F	2½ Yrs.	2½ Yrs.
14	29	F	4 Yrs.	4 Yrs.
15	21	F	1½ Yrs.	1½ Yr.
16	34	F	1½ Yrs.	1½ Yrs.
17	33	F	10 Yrs.	6 Yrs.
18	*			
19	44	F	4 Yrs.	4 Yrs.
20	21	F	1½ Yrs.	1½ Yrs.
21	25	F	1 Yr.	1 Yr.
22	23	F	6 Mo.	6 Mo.
23	53	F	4½ Yrs.	3½ Yrs.
24	38	F	1½ Yrs.	1½ Yrs.
25	90	F	1½ Yrs.	1½ Yrs.

NOTE: \* = No response from Volunteer

Content of Visits

As previously mentioned, most visits are scheduled for the same time each week with the volunteer calling to confirm the visit ahead of time. Some volunteers described the visits in the following ways which represent mutuality:

"Talk about things that have happened to us. She's a good listener and so am I."

"If it's a nice day we go to the park. If it's not nice we stay inside and visit."

Other responses showed a lack of mutuality:

"I let her talk about whatever is on her mind. What she did in the past, a lot of reminiscence, talks about fears and anxieties."

"She (older person) needs an outlet; someone to talk to."

Many volunteers felt that their friend had no one else to talk to and allowed them to control the conversation. Others felt that the older person preferred to hear about the volunteer's life and still others felt a mutuality of interests to be at the center of their conversations. Many discussed mutual interests such as ballet, opera and musical instruments.

Volunteers were asked about specific topics of conversation. All 21 responded that they discussed each others' personal life. Ninety-six percent discussed family and past experiences. Ninety-one percent felt that health was a topic and 91% felt they both gave and received advice from their friend. Current events and cultural events were discussed by 77% of the volunteers, religion was discussed by 67% and loneliness was discussed by 62%. Volunteers felt that older people expressed their fears to them 58% of the time and discussed generational differences 53% of the time. Only 48% of the volunteers had discussed death.

Activities

When volunteers were asked about activities they engaged in with their friends other than talking, 77% reported eating, either in their friend's home or in restaurants. Sixty-two percent reported meeting and/or visiting friends or family of the older person. Forty-eight percent said they had done small errands for their friend and 48% reported going out together for walks. Thirty-eight percent attended social events together (movies, theater, concerts), 29% had attended a DOROT event together. Twenty-three percent had helped their friend with reading, usually due to the visual impairment of the older person. Nineteen percent had shopped together, 14% had cooked together and 9% had helped with letter writing. Four percent had reported playing some kind of game of cards together and another 9% sang or played musical instruments together.

Volunteers were asked about the most important aspect of their relationship. Forty-three percent reported companionship as most important, 29% felt talking was primary, 19% felt that the caring was the important issue and 4.8% reported either friendship or encouragement. Responses included some of the following statements:

"Having someone he can call. He doesn't have anyone else."

"Bring fresh air, a link to reality and the outside world."

"Give her company; listen to her; she's lonely."

"Companionship, showing that someone cares."

Some statements represent more mutuality such as:

"An ear to listen and someone to talk to. A bond has developed between us."

"Deep love and affection for each other."

### Expectations and Realities of Relationship

When asked about their expectations when first introduced to the DOROT Friendly Visiting Program, volunteers were able to respond more concretely than their older friends. Fifty-three percent felt they would be doing a good deed and 10% each felt they would receive friendship, companionship or a link to another generation. Nineteen percent did not know what to expect. Some volunteers hoped to get something out of it:

"I didn't know what it would be like. I thought I might be missing something because all my friends are my age."

"Thought he would be able to tell me about the times and places I didn't know about."

Other volunteers felt they would be doing something for someone else:

"Unknown expectations. Didn't expect a real relationship."

"Expected to be doing a good deed. Expected that it would be a chore but it wasn't."

When these responses were compared with what the volunteers actually felt they were getting out of the relationship, the

reality of the relationship represented a higher degree of mutuality than did their expectations. Forty-eight percent felt they were receiving friendship, 43% felt they were helping others, 24% felt they were getting an exchange of generations, 14% felt they benefited by interesting conversation, 5% felt companionship was an issue and 5% felt they were receiving nothing from the relationship. Typical responses of volunteers which represented mutuality included the following statements:

"Like to get her opinion on things because she has a different point of view."

"I feel good when I visit her. We have a real comradarie."

"Get as much as I give; benefit from her experience; warmth and enjoyment of her company."

"I enjoy talking to her. Sometimes I feel very needed and that's nice. Sometimes it's very reciprocal and I enjoy that."

"Knowing her gives me another angle on the world."

A response representing non-mutuality was as follows:

"Not much; some self-satisfaction about making someone happier."

When asked what they thought their older friend might be getting out of the relationship, 53% felt friendship was the primary issue. Twenty-nine percent responded that their friend received companionship and 14% each responded affirmatively to caring, contact with the outside world and alleviation of loneliness as by-products of the

relationship. Ten percent felt the older people received interesting conversation, 5% reported happiness and 5% reported receiving physical help. Responses to the question "What do you think your friend gets out of the relationship?" included:

"She feels she's not completely alone. It reduces her isolation."

"Companionship; someone to rely on; a sense of security."

"She enjoys the stimulation of conversation, companionship and friendship. She is able to go out of her own world."

"Someone who cares; emotional support."  
"Someone she can count on; someone to talk to; someone to listen to her."

"One hour a week of great conversation."

"Contact with the outside world; something to look forward to every week; someone who cares about her."

Although the majority of volunteers went into the relationship expecting to do a good deed, they found friendship and received as much out of the relationship as they gave.

When volunteers were asked if they were getting what they wanted out of the relationship, 82% said yes and 19% said no. Most volunteers felt that the relationship exceeded their expectations. Here is a sampling of comments:

"Getting what I want, to become friends."

"I'm satisfied. I'm doing a service. There's some satisfaction in helping people."

"Getting what I would like: friendship, companionship and helping someone."

"Expected it to be more one sided but it is really mutual."

Some volunteers were disappointed with their relationship and would have liked more mutuality as evidenced by the following comments:

"Hoped it would develop into a real friendship but it didn't."

"Wanted to have a more active role in helping (older person) rather than just listening."

"Would like it more if we could go do more things together."

Although 4 people were dissatisfied with the relationship to some degree, only 1 person terminated the relationship. The volunteer who ended her relationship did so after 3½ years of weekly visits. She felt the relationship had deteriorated and she was no longer comfortable visiting the older person due to her constant complaining and depression. The volunteer described her relationship in the following way:

"She was getting very dependent...got very little out of the relationship...found her to be very difficult...not mutual at all...she wanted someone to listen to her complaining."

In spite of the problems the volunteer felt she would be interested in starting a relationship with another older person.

The other two volunteers who were somewhat dissatisfied were males about age 30. In both cases, the relationship had been over a 1½ year duration. According to these

volunteers, the problem stemmed from a lack of mutuality. One volunteer felt that there was an emotional component which was missing from the relationship and that he shared more of his feelings than did his friend. He wanted a more open relationship rather than have the focus on himself. The older person also reported a superficiality to the relationship. The other volunteer felt dissatisfied because he felt he received very little from his friend. He had hoped for more mutuality and that the older person might be able to talk about Jewish history and politics. The older person felt that the relationship was mutually rewarding but did feel dependent on his friend.

Volunteers were asked how long they anticipated their present respective relationships to continue. Sixty-two percent felt the relationship would continue indefinitely, even if circumstances altered the nature of it. Nineteen percent cited moving or changes in job as possible reasons for termination. Five percent felt marriage might change the relationship and 5% said that extreme illness of the older person would be the only reason for termination. When asked if they would start a new relationship through DOROT if the present one ended, 11 people or 53% responded yes, 10% responded no and 38% of the volunteers were not sure. The desire for continuity with their older friend (62%) demonstrates the high degree of mutuality which is

the nexus of exchange theory.

#### Comparison of Responses

Responses by older people and volunteers about topics discussed at visits were fairly consistent. A greater percentage of volunteers (96% vs 76%) felt that the past experiences of older people was a topic of conversation. This may be because the volunteers found this to be an area of interest and therefore asked questions about their friend's past. Volunteers also felt that religion and loneliness was a topic more often than the older people reported. Sixty-seven percent of volunteers reported discussing religion and 62% reported discussing loneliness as compared to 48% of the older people reporting discussions on religion and 48% reporting discussions of loneliness.

Older people (60%) thought that they gave advice less often than the volunteers reported (91%), indicating a perception of more mutuality. Volunteers also felt that topics such as death (48%) and fears (58%) were discussed more often than the older people felt indicated (36% and 28% respectively). It may be that older people prefer to view the relationship as based in the present and on mutual interest while the volunteers are interested in the broader life experiences of their older friends.

Some slight discrepancies exist in what activities were reported by older people and volunteers. Volunteers (62%) reported meeting the friends and/or family of the older people more often than older people (36%) reported visiting with friends and family of the volunteers. Volunteers (48%) reported doing errands more often than older people reported (28%). This may be due to the older person's desire not to impose on the younger friends.

Questions about the most important thing the friends did together also invoked different responses. The most important aspect of the relationship to the older people was talking (48%) while the volunteers rated companionship as most important (43%).

TABLE 6

<u>WHAT IS THE MOST IMPORTANT THING YOU DO WITH YOUR FRIEND?</u>		
<u>Category</u>	<u>% Older people</u>	<u>% Volunteers</u>
Talking	48	29
Companionship	20	43
Caring	12	19
Encouragement/stimulation	4	5
Physical help	4	0
Friendship	12	5

Initial expectations of what each group would receive from the relationship were quite different. While volunteers were clearer on what they thought they would receive, these

expectations were not necessarily born out. The majority of volunteers (53%) initially felt they would be doing a good deed, but later felt that they were helping others (43%) and were also receiving friendship (48%).

Sixty-four percent of the older people had no clear expectations and apparently expectations had no bearing on what people actually got out of the relationship. Twenty-eight percent of the older people felt that they were cared about, 24% felt that their loneliness was partially alleviated and 20% said they were receiving friendship.

TABLE 7

## WHAT WERE YOUR EXPECTATIONS?

Category	% Older people	% Volunteers
None	32	0
Friendship	16	10
Good deed	0	53
Companionship	8	10
Physical help	12	0
Connection to generations	0	10
Unsure	32	19

Most volunteers (53%) reported that their friends received friendship from the relationship while only 20%

of the older people felt the volunteers were receiving friendship. Twenty percent of the older people did not know what their younger friends were getting out of the relationship.

TABLE 8

WHAT DO YOU GET OUT OF THE RELATIONSHIP?

<u>Category</u>	<u>% Older people</u>	<u>% Volunteers</u>
Friendship	20	48
Brightens day/Less lonely	24	0
Helping others	4	43
Contact with outside world	12	0
Interesting conversation	12	14
Companionship	4	5
Exchange between generations	12	24
Caring	28	0
Physical help	8	0
Nothing	4	5

TABLE 9

WHAT DO YOU THINK YOUR FRIEND GETS OUT OF THE RELATIONSHIP?

<u>Category</u>	<u>% Older People</u>	<u>% Volunteers</u>
Friendship	20	53
Brightens day/Less lonely	0	14
Helping others	20	0
Contact with outside world	0	14
Interesting conversation	20	10
Companionship	0	29
Exchange between generations	8	0
Caring	12	14
Physical help	0	5
Happiness	0	5
Unknown	20	0

The overwhelming majority of people responded that they were getting what they wanted out of the relationship (92% older people, 82% volunteers). Eighty percent of the older people and 62% of the volunteers indicated the relationship would last indefinitely. Eighty-four percent of the older people liked the program enough to start another relationship, while 53% of the volunteers would try again. This seems to represent a higher satisfaction among the older people than their younger friends, which may be due to the more complex nature of the volunteers' lifestyles. Although the volunteers are committed to their present

relationships, they may not want to commit themselves to a new relationship due to their busy lives. Many volunteers anticipate changes in lifestyles within the next few years and do not feel they can devote the time necessary for a new relationship. Older people, on the other hand, do not anticipate a busy schedule and welcome opportunities for new relationships.

Each group was asked if they felt better about themselves because of the relationship. Thirty-six percent of the older people responded in the affirmative, 20% responded no and 44% said they did not know if they felt better. The actual responses do bear out a heightened sense of self-esteem as demonstrated by the following responses by older people:

"I feel like I have a young person who values my advice."

"She makes me feel wonderful."

"[I] feel that I'm still part of the world... (she) has a liking for me as a person, which gives you a sense of worth."

"I feel better if anyone talks to me."

"I feel that I'm not alone, that someone is interested in me."

This contrasts to 67% of the volunteers who said they felt better, 9% who said no and 24% who were not sure. When asked if they thought their friend felt better about

themselves because of the relationship, 36% of the older people said yes and 64% were unsure. Sixty-seven percent of the volunteers thought their friend felt better and 33% did not know.

TABLE 10

DO YOU FEEL BETTER ABOUT YOURSELF BECAUSE OF THE RELATIONSHIP?

	<u>% Yes</u>	<u>% No</u>	<u>Unsure</u>
Volunteers	67	9	24
Older Persons	36	20	44

TABLE 11

DOES YOUR FRIEND FEEL BETTER ABOUT HIM/HERSELF?

	<u>% Yes</u>	<u>% No</u>	<u>Unsure</u>
Volunteers	67	0	33
Older People	36	0	64

This finding may be related to the volunteers' desire to be helpful to the older person and their expectations of doing a good deed. The volunteers felt better about themselves and thought their older friend also felt better due to the relationship. This indicates a perception of mutual exchange. Older people were less sure about their own feelings and about their impact upon volunteer friends.

Each person was asked if he or she agreed, disagreed or was undecided on 27 statements. These questions were designed to elicit attitudes about mutuality, dependency, friendship and intergenerational relations. In general, the responses from both groups indicated a high degree

of mutuality, feelings of friendship and caring and a low degree of dependency. Although 88% of the older people and 82% of the volunteers were glad that their friend represented a different generation, only 56% of the older people and 55% of the volunteers felt they helped their friend to understand each other's generation. Many people from both groups responded that, although there were differences in their ages, they did not feel a generation gap and treated each other as peers. Although 100% of the volunteers and 76% of the older people stated that they did not feel dependent upon their friend, 84% of the older people responded that their friend kept them company and 80% felt they could rely on their friend if needed. This compares to only 57% and 19% of the volunteers who responded affirmatively to those questions. This is due in part to physical limitations of many of the older people.

Volunteers were reluctant to impose responsibilities on their older friends, although they did not question the older persons' willingness to help. Interestingly, a higher proportion of volunteers (96%) than older people (72%) responded affirmatively to the question based on mutuality which was "[w]e keep each other company". Both groups agreed that volunteers do more for older people than older people do for volunteers and that life would be more difficult for older people without their friend

but not vice-versa. Eighty percent of the older people and 62% of the volunteers felt that their friend did things for them. The author was usually asked to clarify this question and it was broadened to cover emotional as well as physical factors.

TABLE 12

QUESTIONNAIRE RESPONSES (RAW DATA)						
Ques- tion	% Older Person Agree	% Older Person Disagree	% Older Person Unknown	% Volun- teer Agree	% Volun- teer Disagree	% Volun- teer Unknown
1	84	16	0	57	29	14
2	56	36	8	57	34	9
3	24	64	12	38	62	0
4	96	4	0	91	9	0
5	64	32	4	19	77	5
6	60	8	32	*	*	*
7	56	36	8	53	38	9
8	72	28	0	96	4	0
9	96	4	0	100	0	0
10	20	72	8	9	86	5
11	64	36	0	4.5	91	4.5
12	80	20	0	62	33	5
13	88	4	8	91	9	0
14	72	24	4	53	33	14
15	44	56	0	38	62	0
16	12	76	12	62	33	5
17	52	44	4	76	24	0
18	88	8	4	91	9	0
19	100	0	0	100	0	0
20	96	4	0	96	4	0
21	24	76	0	0	100	0
22	60	16	24	76	24	0
23	80	8	12	57	24	19
24	88	8	4	82	9	9
25	64	24	12	19	72	9
26	44	28	28	57	29	14
27	96	4	0	14	81	5

NOTE: \* = Inappropriate question for volunteers

Ten questions were designed to elicit feelings about mutuality and generated affirmative responses from both

older people and their volunteers:

Question #4 - We share our feelings and thoughts with each other.

Older people: 96%                      Volunteers: 91%

Question #8 - We keep each other company.

Older people: 72%                      Volunteers: 95%

Question #9 - I feel I have something to offer my friend.

Older people: 96%                      Volunteers: 100%

Question #12 - My friend does things for me.

Older people: 80%                      Volunteers: 62%

Question #13 - The relationship is mutually rewarding.

Older people: 88%                      Volunteers: 91%

Question #14 - We give each other an understanding of each other's generation.

Older people: 72%                      Volunteers: 53%

Question #18 - I trust my friend with my confidences.

Older people: 88%                      Volunteers: 91%

Question #19 - I feel my friend really cares about me.

Older people: 100%                      Volunteers: 100%

Question #20 - I consider him/her to be my friend.

Older person: 96%                      Volunteers: 95%

Question # 27 - I would like to see my friend more often.

Older person: 96%                      Volunteers: 14%

With the exception of question #27, answers represent a high degree of mutuality indicative of exchange theory. Although volunteers did not want to see their DOROT friends more often, they also did not wish to end the relationship. Apparently they wanted to maintain the friendship in its current state whereas older people preferred to expand the relationship. This does not seem to affect the balance between the two parties, because the older people have

a realistic view of what to expect from their friends and do not ask for more.

Questions relating to mutuality seemed to have had the highest correlations. Ninety-six percent of the older people and 91% of the volunteers responded that they shared feelings and thoughts with each other. Ninety-six percent of the older people and 100% of the volunteers felt they had something to offer their friend. Eighty-eight percent of the older people and 91% of the volunteers felt the relationship was mutually rewarding.

Two case histories represented older people who were completely immobilized due to multiple sclerosis. These volunteers were much more active than their partners in doing errands and concrete tasks within the relationship. Despite this apparent imbalance, the two older people and one volunteer who were interviewed rated the relationship as mutually rewarding. All felt they gave something to their friend in terms of caring, emotional support or knowledge. This has implications for social work practice in that the perception of being cared about has as much value as the concrete tasks being performed.

Questions relating to friendship and caring were also highly correlated. Eighty-eight percent of the older people

and 91% of the volunteers trusted their friend with their confidences. One hundred percent of both groups felt their friend really cared about them and 96% of each group considered their partner to be their friend. Both groups felt their friend fulfilled their lives in a different way than family.

Ninety-six percent of older people would like to see their friend more often as opposed to only 14% of the volunteers who wanted more time together. Older people also preferred more contact with the DOROT staff (64%) than did the volunteers (19%). This probably represents the isolation and loneliness the older people feel and the need for contact with people in general and the allegiance they feel to the agency.

Analysis of data is a prerequisite to understanding the importance of exchange theory. Understanding how older people and volunteers feel about a Friendly Visiting Program leads to improved programming for the elderly. In the next chapter, the implications associated with the findings will be reviewed.

CHAPTER VI  
IMPLICATIONS OF STUDY FINDINGS

Summary of Findings

The DOROT Friendly Visiting Program services the elderly living on Manhattan's Upper West Side. The population is predominately Jewish, middle class and white. To describe the general condition of this group participants were asked to rate themselves on the following well-being chart:

TABLE 13

OLDER PERSONS' SELF-REPORT		
Category	% Good to Fair	% Poor
Financial status	84	16
Physical health	56	44
Mobility	36	64
Hearing	80	20
Sight	76	24
Mental Health	96	4

The areas of greatest difficulty lay in physical health and mobility with areas of greatest strength in mental health, financial status, hearing and sight. This supports the hypothesis that this group may be isolated due to physical limitations rather than by choice.

There is a wide range of older people served by this program. Ages vary from 60 to 94, health varies from very active to completely immobilized and disabilities include blindness, deafness and mental incapacities. Length of

participation in the program was from 3 months to 6 years. All but one older person lived alone, 3 people had full time homemakers and several others had part-time help. All 25 had work histories although there was a wide range in educational backgrounds from grammar school to post graduate school. Nineteen people were visited by their DOROT friend on a regular weekly basis and visits lasted from one hour to several hours. Nineteen older people rated their relationship as excellent and 6 rated it as good.

A typical profile of the older person in the DOROT program would be a Jewish female of 80 who lives alone and has been widowed for a number of years. This person typically has been in the program for 2 years and with the same volunteer for 1½ years. Measured by self-reports, the typical older person felt that financial status and physical health was fair, mobility was poor and hearing, sight and mental health was good. The typical person had either no family contacts or no friends, although one third of the population had neither. The author did not find any real differences in responses between the young old and the old old. Isolation and loneliness seemed to be correlated to circumstances of living influenced by such things as death of loved ones, proximity of family members and physical health and mobility. It also appeared

that many people did not feel lonely although their circumstances looked very isolated to the observer. These people were the ones who felt self-sufficient in their youth and had maintained this attitude. Although they enjoyed their relationship with their friend, they did not feel dependent upon it to maintain their self-esteem.

This sample does represent a group of people who are feeling isolated from the general population through health or other circumstances and who feel they are benefiting in some way from the Friendly Visiting Program.

A review of the 21 volunteers shows an age range between 21 and 75 years with a high proportion of females. Participation in the program was between 6 months and 7 years and volunteers had been with the same older person for between 6 months and 6 years. The typical volunteer was age 37, employed full time, with the DOROT program for 2 years and visiting the same older person for the last 21 months.

Typical visits seem to be on a weekly basis for 1½ hours each visit. Over 75% of the visits included sharing food either at home or in a restaurant. Approximately 44% of the visits involved going outside for walks and almost half the participants visited with each others family

or friends. The overwhelming activity was talking which was reported by 100% of those interviewed. A variety of topics were discussed, but almost everyone reported discussing their personal lives with each other. This included work, family, weekly activities and other present oriented topics. Cultural and current events were often discussed and religion was brought up mostly around religious holidays. Volunteers reported talking about the past experiences of their older friends more often than the older people reported it, due in part to the older person's desire to remain in the present and the younger person's interest in the past. Similarly, volunteers reported discussions about loneliness and death more often than did the older people. Volunteers felt that they gave and received more advice than was reported by the older people and that differences in generations were discussed more often.

Interestingly, the author found that most participants from both groups did not feel any generational differences between them once the relationship was established. Although almost all volunteers offered to do errands for their friend, only 28% of the older persons permitted this. It may be indicative of the desire towards mutuality and the inability of the older person to reciprocate in this area.

People's expectations of a potential interaction may

influence the outcome of the relationship. Initially volunteers appeared to have had clearer expectations of what the relationship would be like than did their older counterparts. Volunteers expected to be doing a good deed but in addition found the same friendship they hoped to be giving the older people. When asked in an open-ended question, 20% (5) of the older people felt they received friendship, 24% (6) felt their days were brighter and 28% (7) felt that someone cared about them. Seventy-two percent of the older people responded positively with words and phrases which described feelings of friendship.

This sense of caring, plus contact with the outside world to alleviate their loneliness, seemed to be most important to the older person. Were it not for their Friendly Visitor, many of these people would spend the week without any contact. Exchange theory specifies that people do not have to get the same thing out of a relationship in order for that relationship to be balanced. It is more important for people to get what they want and to give what they want in order to ensure the continuity of the relationship.

On the whole, volunteers were very committed to the relationship and satisfied with what they were receiving but only half would start a new relationship. This may reflect the extent of the commitment made by the volunteers,

both physically and emotionally. Many volunteers felt they valued the relationship and their experience but would not want to commit themselves again to the time and emotional strain. The actual relationship was what seemed to be of primary importance rather than the program of friendly visiting. This perspective is somewhat different from that of the older people who were very satisfied with their relationship, enjoyed the idea of a visitor and would gladly start a new relationship if the present one ended. The older people seemed more involved with the DOROT program and staff than did the volunteers.

The stability of the relationship with the agency helps the older people to allow the volunteers to leave. Often if an older person has no visitor, the DOROT staff tries to fill the void. Knowing that the staff cares about them helps the older person bridge the loneliness between volunteer visitors. Older people were better able to verbalize the possibility of the relationship ending than the volunteers. Although the older people felt the relationship was important to them, they understood that the younger people had busy lives and might leave them someday. The volunteers had more difficulty and often linked ending the relationship with termination of their involvement with the Friendly Visiting Program, or the death of the older person.

Both groups believed that the relationships were based on friendship, caring and mutuality. Although each was not equal in what it could do for the other and this fact was easily acknowledged, both felt that the relationship was balanced. Volunteers visited the older people in their homes, did occasional errands for them and planned outings. The older people were not able to reciprocate in kind but felt nonetheless they contributed to the relationship by sharing their thoughts and emotions with the younger volunteers. The older people felt free to express how they felt about world events and feelings about themselves and their loved ones. Each partner received from the other according to his/her needs. Each person felt cared about by the other and felt that their lives had significance.

The need to be nurtured is not age related and crosses generational boundaries. This has implications for exchange theory which states that as long as both parties feel they are getting what they want and giving what they want, mutuality exists. The concept of mutuality and its importance to the field of ageing is an area which needs to be incorporated into program design. Traditional social service programs are based on the giving of services to the older person. This can create a loss of self-esteem. Programs should be designed to increase feelings of self-worth and allow older people to contribute their experiences and emotions

to others. Organizations which serve this population should be aware of the importance of exchange theory.

#### Relevancy of Exchange Theory to the Field of Ageing

Areas of greatest exchange between older people and volunteers involve sentiments of caring. Ninety-six percent of the older people and 91% of the volunteers felt that they had shared their feelings and thoughts with each other. Eighty-eight percent of the older people and 91% of the volunteers felt the relationship was mutually rewarding and that they trusted their friend with their confidences. One hundred percent of both groups felt their friend really cared about them and 96% considered their partner to be their friend. The concepts of reciprocity (services) and mutuality (feelings) are balanced creating a true social exchange.

Activities which reflect exchange theory include sharing personal experiences (96%), sharing of food (64%), giving and receiving advice (60%), and visiting with each others's friends or family (36%). The most important consideration still remains the feelings the older people have about their volunteer friends. They describe the interactions as exchanges of confidences, caring friendships, exchanges of conversations, being together, enjoying each other's company, and so on. There is no doubt that the older people

feel that a balanced exchange is taking place.

Thirty-six percent of the older people felt better about themselves as a result of the relationship, 44% were not sure and 20% felt that the relationship did not affect their self-esteem. Most of that latter 20% responded that self-esteem was not a problem for them anyway. Although only 36% reported feeling better because of the relationship, the responses demonstrate a heightened sense of self-esteem. It may be that some older people do not feel they have a problem of self-esteem but that friendships add to a sense of self-worth. It should be briefly noted here that in formulating the questionnaire, DOROT staff felt that the use of the term "self-esteem" might confuse the older person. It was for that reason that the author did not ask specifically about self-esteem but instead tried to determine if they felt better about themselves due to the relationship. In any event, for older people who have some problems related to self-esteem, the Friendly Visiting Program does help. Organizations serving an older population should understand how a Friendly Visiting Program represents social work principles when planning for program design.

#### Social Work Principles

According to exchange theory the withdrawal of a positive reinforcer can generate a cost to the person which can

result in a lowering of self-esteem. In the field of ageing, the positive reinforcer has been social approval which is gradually withdrawn as people age. Few new roles are available to older people, especially for those with physical impairments, and as a result they become more isolated from mainstream society.

Social exchange, according to Blau in The Dynamics of Bureaucracy, occurs when one person furnishes a service to another. The expectation is that there will be a service returned at a future time, creating an atmosphere of reciprocity. If the second party does not reciprocate, he/she becomes obligated to the first and feelings of dependency arise. If the relationship becomes unbalanced, the older person may need to discharge his/her obligation by subjugating him/herself to the other person.

One important feature of the Friendly Visiting Program is that older people have an opportunity to balance the relationship and retain their self-esteem. Mutuality of exchange does not infer the activities involved in the exchange are similar. The key to a successful exchange is that each person should feel that he or she is profiting. This may not be apparent to an observer, especially if one partner is more physically active than the other. As long as there is a matching of needs, a true exchange

is possible.

The value placed on any activity must be measured by the person receiving the activity rather than the person giving it. This may be due to the differences or the similarities of the parties involved and their respective needs. Therefore, a questionnaire asking for a self-report on how older people feel about a relationship is the most valid way to elicit this information. Self-report promotes client feedback and encourages evaluation of programming. Consumer satisfaction should be a feature of any social service program and continuity of participation is one measure of satisfaction in a voluntary Friendly Visiting Program.

Exchange theory involves the exercise of power, which requires resources such as money, approval, esteem or respect, or compliance. Money is often not an available resource for exchange among the elderly. Compliance can result in loss of self-esteem by creating a submissive or dependent relationship. Friendship offers an avenue for exchange in which the older person can feel good about him/herself and can strengthen his/her ties to the outside world while reducing his/her isolation. Although no concrete services are rendered, the program impacts on the psychological well being of the older person.

Client participation is another important social work principle. Within a voluntary Friendly Visiting Program, the older person helps to design the nature of the service through the relationship with the volunteer. If needs are not being met, the older person can negotiate for more/less time, change the nature of the relationship or terminate the relationship. The older person can exert some control over his/her environment and maintain a sense of power which is often unavailable through other services. This is because the volunteer wants to continue the relationship as much as the older person. Although the reasons for being in the program may be different, volunteers need the interaction and are therefore on an equal basis with their older counterparts. Although many older people accept whatever is given to them, a one-to-one relationship offers them more opportunity to be an active participant than many other types of service.

#### Role of Professional

Although the Friendly Visiting Program is based on the relationship between the older person and the volunteer, it is important to understand the vital role of the professional. The social worker provides the volunteer with his/her first contact with the agency and defines its goals and objectives. It is critical that this philosophy be conveyed in order for the agency to carry out its mission

to promote mutuality and reciprocity. The social worker must determine the motivation of the volunteer and what he or she expects to get out of the relationship.

The professional screens all inquiries about the program from the older people and/or their families. As the type of service is quite specific the worker must make sure that the older person can benefit from the relationship and that more intensive services are not needed. Social workers should also serve as referrals to other needed services. Professionals can use their skills to determine client strengths and weaknesses. The interview should also elicit information regarding interests, hobbies, past experiences and expectations, all of which may influence the outcome of the relationship. Social workers arrange the match between the older person and the volunteer and remain the link between them and the agency.

The social work professional continues to be involved even though the relationship is between the older person and the volunteer. This is important since the older person may need additional services as time goes by and the volunteer may need guidance in handling changes in the relationship. Social workers should be available for crisis management as well as routine problems which may develop in the areas of physical or mental health, housing, nutrition or family

relations. Social workers may wish to become actively involved with the older person or supervise the volunteer in helping the older person deal with the problem. Professionals also need to be aware of the relationship between the older person and his/her volunteer to determine if the exchange is a positive one.

Some examples of social work intervention include the following:

A volunteer had been visiting his friend for about a year when the friend became ill. The volunteer felt responsible for getting his friend to doctor's appointments, etc., which placed a strain on his own life. The referral for additional services helped alleviate some of the burden from the volunteer allowing him to continue the relationship.

A volunteer wished to terminate the relationship with her friend after almost 4 years of visiting. She felt the older person had gotten progressively more difficult and demanding and that the relationship had become a burden. The social worker was able to provide counseling to the volunteer to assist in the termination process.

These examples demonstrate how an agency can be helpful to the volunteer and the importance of monitoring the relationship. Another consideration is the protection of the client against well intentioned, but inappropriate volunteer actions. This includes advice giving in areas requiring professional knowledge or creating undue dependency. An agency cannot surrender its responsibility for the well

being of clients to non-professional volunteers. Organizations need to step in when concrete services are needed thus allowing the volunteers to maintain the balance in the relationship. It is important that care giving between the friends remain mutual rather than one sided as in a pure service delivery program.

#### Volunteer Orientation and Training

A critical area for social service agencies interested in this type of program is training: how can mutuality be fostered within a relationship between an older person and a visiting volunteer?

Agencies planning to institute a Friendly Visiting Program must prepare volunteers. This training should include concrete material on older people such as what they might be like, what their needs might be and possible emergency procedures. Under the guidance of professional social workers, volunteers need to examine their motivations for participating in the program and their expectations of the relationship. The interaction between the volunteer and the agency should also be set forth in a clear policy. Due to the fiscal constraints of most agencies, training is often accomplished through the use of a manual rather than one-to-one or group discussion. Therefore a comprehensive training manual is essential to any volunteer program.

Friendly Visiting Programs such as the DOROT program do seem to alleviate the isolation and resultant loneliness suffered by many older people. The program offers advantages to the sponsoring agency in terms of cost, personnel and space requirements.

Although the importance of a professional staff cannot be disputed, the use of volunteers minimizes the number of staff needed to carry out such a program. Case loads can be significantly higher because the regular home visit component is eliminated. Once a relationship is established, the social worker can rely on the volunteer to do much of the reporting. Periodic professional intervention is important but volunteers allow for a greater expansion of the program.

Orientation of staff is a most important feature of program planning. Employees need to be familiar with agency philosophy so to properly train volunteers to carry out agency goals. Professional staff should learn what traits to look for in volunteers as well as how to match them with older people. The agency must be well aware of the population it is serving in terms of age, level of disability (blind, deaf mental and/or physical incapacity, etc.) and stated need. Training by professional staff should focus on the orientation of volunteers as to:

- 1) agency goals and philosophy,
- 2) agency policy and procedures,
- 3) psycho-social dynamics of ageing, and
- 4) possible expectations and realities of the potential relationship.

Agency goals and philosophy should reflect mutuality as a vital part of friendship between two people. Volunteers should be made aware of exchange theory as it relates to ageing. The goal of alleviating loneliness for the elderly through Friendly Visiting rather than traditional casework services should be explored. Volunteers should try to find areas of commonality to share or discuss. These can be in the form of similar interests or sharing of experiences, a form of mutuality in which the older person will feel he/she is able to contribute his/her skills or knowledge to another person.

Another area of great importance is the sharing of daily experiences which helps older people feel part of the outside world. Knowing a younger person and feeling a part of their life helps older people to feel that they are still participating in society. Finally, the sharing of feelings and sense of caring which is conveyed between two friends will help alleviate the loneliness and sense of loss many older people feel at this stage of their lives.

Agency policies and procedures, the guidelines of behavior the agency wants volunteers to follow, are another important part of an orientation program. Volunteers come from a variety of backgrounds and educational levels and it should not be assumed that because people have an interest in ageing that they also possess the prerequisite knowledge necessary to work with this segment of the population. The volunteer should understand that he/she is to share an experience with the older person and is not expected or permitted to provide casework services.

Professional staff should train volunteers to be alert to signs of depression, mental illness and/or physical illness which may occur and to know when to consult with professional staff. Ongoing training should deal with possible emergencies which older people might have (e.g.: falls, eviction, illness or hospitalization, etc.) as well as life stage changes (e.g.: retirement, loss of loved one, physical impairments, etc.).

#### Training of Volunteers

The last category to be discussed involves helping volunteers understand the potential and limitations of their relationship. Volunteers may have a variety of reasons for wanting to become a friend to an older person. Sometimes expectations are unrealistic in terms of what the older

person can contribute or in what the volunteer hopes to accomplish. Some volunteers may want something specific out of the relationship such as knowledge of Jewish history, reminiscence of war experiences or other topics the older person may not want to discuss. The volunteer may want to take the older person to concerts, museums or movies which may be too physically taxing. It is important to discuss these issues before the relationship begins so as not to raise false hopes for either party. It should be stressed that each pair will need to work out their own relationship to mutual satisfaction and that flexibility is very important. Possible activities may be suggested to the volunteer, but it should be made clear that a quiet chat may be all the older person wants or needs. Professional staff should be available to volunteers on an ongoing basis for consultation on any issues which may arise.

#### Orientation for Older People

Although training is usually reserved for professional staff and volunteers, orientation of the target population in a Friendly Visiting Program is equally important. Discussion of what is and is not being offered will often help to determine the success or failure of a program. Some older people may have clear expectations of what they want or need. If so, an attempt should be made to fulfill this need. Needs which exceed the limitations of the program

should be discussed and referrals made to more appropriate agencies. It is important to try to determine if the older person wants companionship, a confidant, or someone to go with to social activities. If more concrete help is being requested, the professional staff needs to have that information. A psycho-social summary or social history would be helpful in eliciting this information.

The social worker is trained to determine the appropriateness of a person for this type of program. Areas of concern are ability to carry on a relationship and emotional or mental capabilities. Those people unable to participate should be referred to other programs. This requires staff to be knowledgeable and to involve themselves in a network of geriatric services.

Older people may be unsure as to what to expect from the relationship or why someone would volunteer to visit them. They may have low self-esteem or feel they have nothing to contribute. They may also have a general fearfulness of strangers and be reluctant to have unknown people enter their home. It is important that professional staff assure them that they do have something to offer and that volunteers are pre-interviewed before being accepted to the program. One way for professionals to stress the value of the older person is their treatment of them.

A caring attitude, courtesy and an interest in what the person has to offer will convey a sense of respect and worthiness. The demonstration of continued interest by occasional telephone calls also help older people to feel valued.

Problems of self-esteem can be addressed by stressing the strengths, accomplishments and interests of older people. The program philosophy needs to be explained so that older people will feel like participants rather than recipients of a service. The role of the agency as well as the role of the volunteer should be explained so that a sense of belonging and trust will develop between the older person and the agency.

#### Agency Preparation for Training

Organizations interested in setting up a Friendly Visiting Program should examine their resources as well as the needs of the community. Demographic information is available through community groups, religious organizations, governmental social service agencies, and political groups. Approximate numbers of elderly should be determined in order that the agency can provide adequate services. The agency needs to be able to reach those elderly people who are most isolated from the outside world and who may or may not have affiliations to other types of social, religious

or service based organizations. Outreach services should not exceed agency resources. A waiting list is acceptable, especially during the initial phases of program implementation, but the agency needs to commit enough manpower for a viable service.

Whether an agency is adding a Friendly Visiting Program to its organization or forming a new organization based on this program, resources must be available to carry out the program. Areas of concern include funding sources, personnel needs, physical plant, and support services.

Funding resources must first be identified. These sources can be governmental or private, each having its advantages and/or drawbacks. Organizations can rely on either but a combination is usually preferable. Government funding is usually service specific, mandating the agency to serve an identified population. This includes eligibility requirements which may be based on age, ethnicity, geography or financial need. Documentation of service delivery is another element of government funding. Private funding may be from non-profit foundations, private donations and/or fund raising events. Monies from these sources can usually be used at the agency's discretion for actual services, personnel or other support services. Identification of funding sources becomes an essential component of organizational

life and much energy is often devoted to it.

Personnel needs include professional social workers, administrators and support staff. In small organizations, people may perform more than one role. Agencies must decide what level social workers to use, how much to compensate them and how many staff is necessary. Areas such as adequate supervision, case loads, level of experience, and benefits must be examined. The use of volunteers or student social workers is an option for many agencies.

Agencies should have adequate space to meet its needs. Personnel should have offices and program space should be taken into consideration. If visiting is always in the home of the elderly, less space is required for the agency. Staff meetings for large numbers of people could be held at another location on a contract basis. Concerns over accessibility to public transportation or by the physically handicapped are also less important when workers do home visits.

Support services include telephones, mailings, paper and supplies, duplication services and maintenance. Agencies need to evaluate how much they need to spend on outreach and on-going programs in this area. Adequate support services are essential to an agency's ability to carry out its mandate.

### Conclusion

Today's ageing population has better health and financial status than in the past but still has unmet needs. According to Neugarten, 95% of the elderly live in the community.\_58/ Census data confirm that many of these people live alone and 5% require help due to mental or physical dysfunction.\_59/ Depression occurs in many people due in part to situational factors including isolation and loneliness.\_60/ It is to be expected that the percentage of people over 75 and 80 will continue to expand over the next decade. Programs which address the problems of this group should be studied so that the social work profession can better meet their needs.

As people age they undergo physiological, mental and emotional changes. Some of the difficulties stem from environmental factors such as the death of loved ones, retirement, loss of support systems or loosening of family ties. Traditional care givers are not available due to changes in the work force which now include a large proportion of middle aged women. As a result, older people are often lonely and in need of companionship. Just when friendship becomes most important, older people are deprived of

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58/ Neugarten, "Older People, A Profile", p. 48.

59/ Tolliver, p. 316.

60/ Neugarten, "Older People, A Profile", p. 50.

opportunities to meet new friends and even to visit with old friends. This is due to physical impairments, unsafe traveling conditions, lack of resources and/or the death of peers. If family is not in close proximity, older people can find themselves totally isolated from the rest of society. This study found that 64% of the sample population had little or no contact with their families and 76% had little or no contact with friends other than their Friendly Visitor. Many programs have been instituted to deal with this problem but with the exception of the Friendly Visiting Program, none deal specifically with the home bound elderly and their need for friendship.

A Friendly Visiting Program not only meets the needs of the elderly for meaningful interaction, it contributes to the overall well being of society by ensuring a place for older people. Rather than blaming the elderly for having no place in society, older people are given respect and a sense of self-worth. Younger volunteers also benefit from the experience of a relationship based on sharing and mutual concern. Although volunteers initially feel that they are doing a "good deed", it has been clearly shown from this study that they are receiving as much as they are giving. The most successful relationships are built on the concept of mutuality in which each person gives what they can to the other and receives something

in return. The most important activity of exchange was caring and friendship which was freely given by each to the other.

The development of the relationship is crucial but must be built upon a foundation which represents the concept of mutuality. This can best be accomplished through orientation and training of the volunteer Friendly Visitors. Organizations need to develop training tools which will help volunteers to understand how they can foster independence, self-esteem and friendship with the older persons they visit.

The manual which was developed by this author deals with the role of the volunteer, the role of the agency and professional guidelines for courtesy, agency regulations and policies, possible relationship pitfalls, and gives some case history examples of the variety of relationships that may occur. A training manual does not replace the need for professional supervision. However, it does serve as a set of concrete guidelines for both agency and volunteer behavior and expectations, and as a reference to many questions and situations that may arise during the course of the relationship.

The author is confident the training manual presented herewith will be helpful for either those agencies starting

a Friendly Visiting Program or for those with operational Friendly Visiting Programs. In both cases, the manual has been based specifically upon an empirical study of an on-line, successful Friendly Visiting Program. As such, it stands as an authoritative training instrument for those agencies who have not independently developed the necessary record research in this discipline.

### Research Problems

The interpretation of data can always be questioned when the interview method of research is utilized. Self-report represents the feelings and attitudes people have at a certain time. One runs the risk that these feelings can be transitory although this author does not feel that this was a problem in this particular study. Alternatives to self-report include interviews with professionals regarding their judgements about the relationship. The author feels that by eliciting self-reports of both older people and their volunteer(s), a balance is obtained.

This author feels that two concepts used, namely "friendship" and "self-esteem", might have been better defined in order to illicit more precise responses. The word "friendship" was used to express feelings of caring, companionship and sharing. The older people interviewed may have attached their own values to the word. The term

"self-esteem", likewise, is open to subjective interpretation. The author allowed the older people to define these terms subjectively because this is compatible with exchange theory.

Another problem area was access to information from DOROT concerning budgets and staffing. Although the agency agreed to share this information, staff was not able to follow through on this author's request due to their lack of time. Therefore this information could not be brought forth in this study.

Although this author fulfilled the mandate of the research project, namely to determine the level of mutuality and reciprocity in friendships between the homebound elderly and volunteers who visit them, other research questions were raised during the course of this investigation. It would be interesting, for example, to perform a longitudinal study to see how the 25 friendships continue to develop and/or change over time. A follow-up study would also be helpful in determining the helpfulness and/or effectiveness of the developed Training Manual for Friendly Visitors in contributing to a qualitative difference in a client/volunteer relationship.

#### Implications for Future Research

The project amply demonstrated the link between exchange

theory and the field of ageing through a Friendly Visiting Program. The DOROT program is successful because of the commitment of the agency to serve the needs of the elderly in their community. This is demonstrated by the low turnover in staff, which is due in part to the sharing of goals and philosophy between the agency and the staff. The organization serves mainly a Jewish population and it is not surprising that the staff is predominately Jewish. Although volunteers are not matched on the basis of religion, most are also of the Jewish faith. What seems to be of importance is the sense of caring about ones community. This can be replicated in other areas, urban or rural, if this feeling of taking care of one's own can be tapped. For an older person to allow a stranger to visit them there must be a feeling of trust. It is therefore this author's opinion that ethnicity may be one factor which needs further consideration.

The use of volunteers is another area which should be examined. What is the impact of this trend on the social work profession? How can this profession use volunteers to their best advantage without lowering the quality of service delivery to its clients?

There are other interesting questions too. What other types of programs can be initiated which utilize the concepts

of mutuality and reciprocity? Can traditional social services incorporate some of the components of exchange theory which lead to a heightened sense of self-worth among the elderly? The findings presented in this study are important to the practice of social work and efforts should be made to continue to study exchange theory and how it relates to the ageing.

CHAPTER VII  
TRAINING MANUAL FOR FRIENDLY VISITORS

Introduction

A Friendly Visiting Program is based on the idea that many older people are isolated and lonely due to ill health or circumstances of living. When people grow old they do not necessarily lose their interest in society or the desire for companionship, but rather their opportunities for personal growth diminish. Traditional social services have not adequately addressed this problem for the many homebound elderly living in the community.

A current theory with application to the field of ageing is exchange theory. It posits that a person will continue in a relationship as long as the rewards outweigh the costs. Rewards are individually defined and usually vary from person to person. Older people often value companionship, emotional attachment and a link to the outside world. The feelings of mutuality and reciprocity which come from participation in a one-to-one relationship can be extremely valuable to older people who have few other outlets for expressing self-worth. A regular visitor who volunteers his/her time on a weekly basis can become an important variable in the life of a homebound elderly person.

A friendly visitor is one who makes a commitment of time and involvement to an older person. The visitor is expected to spend at least one hour weekly with his/her friend and to develop a relationship based on mutual interests and caring. Guidelines for the relationship will be suggested by the agency professionals, but the volunteer is expected to establish and continue the relationship with minimal assistance.

#### Role of Volunteer

You will be interviewed by agency staff to determine what interests you may have in common with older people requesting services. The willingness to share yourself with another person is the most important component. As a volunteer, you must be prepared to commit yourself to the one hour weekly minimum time requirement prior to starting the relationship. Agency philosophy will be discussed, specifically the value of mutuality for the older person. The professional may suggest ways of encouraging feelings of mutuality such as the sharing of food, meeting each other's friends or family, the sharing of personal experiences and the exchange of ideas. These experiences will probably flow out of a developing concern for each other similar to other friendships you might have with peers. Discussions of what is going on in the present will help you to move forward with the relationship. You may find that older

people have interesting ideas about current events, movies and books, and other topics of mutual interest. The different vantage points is one reason why intergenerational friendships are worthwhile.

The importance of independence for the older person is also stressed. You should be aware of ways in which you can foster this in your friend. Examples include asking for advice when appropriate, showing an interest in the older person's past accomplishments and present strengths. It is important that the older person feel that he/she can do something for you within the relationship.

Volunteers should examine their reasons for wanting to participate in this program. Some people feel they want to get to know an older person because they never knew their own grandparents. Others enjoy relationships with older people because of past positive familial relationships. There are many reasons for volunteering one's time, such as a desire to help someone else, concern about the problem of ageing or interest in information or knowledge about earlier times. All are valid and, regardless of the initial reason for wanting to become part of the program, most people are able to establish a meaningful friendship based on mutuality. Try to remain open to changes

in the relationship which reflect the needs of each person rather than trying to keep the relationship static.

Guidelines regarding courtesy and agency regulations include the following:

- 1) Choose a time for visiting which is convenient for both parties. It is a good idea to call earlier that day to confirm the appointment in case your friend is ill or needs something from the store.
- 2) Be punctual and consistent in your visiting. If circumstances prevent or delay your visit, you should telephone your friend as soon as possible to avoid undue disappointment.
- 3) Arrange the visit for a time when the older person is alone to alleviate loneliness and maximize privacy.
- 4) Stay at least one hour. It is advisable to state the departure time at the outset so both of you can prepare for the end of the visit.

- 5) Visits should be appropriate to the needs and limitations of the older person. Issues such as hearing or visual disabilities, or mobility problems should be taken into consideration in planning activities.
- 6) Be aware of forms and reports you will be responsible for as well as future training requirements.
- 7) Always call your friend if you cannot keep an appointment. If you plan to be out-of-town for more than one week, you should contact the agency so that alternative visitation plans can be arranged.

#### Possible Pitfalls

Volunteers may have a variety of concerns regarding their role as a Friendly Visitor. You have entered into a commitment with the agency and the older person which should not be taken lightly. Some of the questions volunteers may have include the following:

- Q. What do you do in an emergency if the older person becomes ill during a visit?

- A. An emergency could be a fall, fainting, unconsciousness, intense pain or other condition. In a life or death situation, call 911. If the older person feels ill, try to reach his/her doctor and a relative. Stay calm and try to reassure your friend. Real emergencies are rare but if one occurs, use common sense.
- Q. What do you do if the older person seems mentally incapacitated?
- A. Older people can become confused, disoriented or depressed due to either medical conditions or mental illness. It is important to contact the agency social worker if any acute changes occur. Mood changes may be due to a life situation (loss of loved one, financial problems, etc.) or to illness (increased pain, stroke, etc.). These problems should be discussed with a professional and should not be considered a breach of confidentiality with your friend. You may become aware of a problem but only a professional is qualified to assess its significance. Environmental problems such as no food in the house, unsafe conditions or very poor housekeeping should also be reported to the agency social worker.

Q. What happens if I decide I want to terminate the relationship?

A. There may be many reasons for a relationship to end. You may have a change in your life such as a new job, marriage, relocation, etc., which limits the time you can spend with the older person. The older person may become difficult to be with due to mental or physical illness. Termination of a relationship should be done with the help of the agency professional. It is very detrimental to end a friendship without proper preparation and a social worker can provide guidance in this area.

Q. How close should I get to the older person?

A. You can become as emotionally involved with your friend as both parties want. It is important, as in any relationship, to take the time to get to know the other person so that expectations are not raised which cannot be met. It is suggested that you do not share too much information about yourself until you are sure you are committed to the relationship. Never make promises you cannot keep, do not become over involved in your friend's personal problems too soon, and do not extend yourself with time commitments which cannot be met.

Q. What can I expect to get out of the relationship?

A. Each relationship is unique as is each individual.

When the initial match is made, each party should decide if they feel comfortable with the other person and if they feel a friendship is possible. If both decide to proceed with the commitment, certain behavior guidelines should be established (promptness, attendance, when to call, etc.). If the relationship progresses, it should reflect the needs and desires of both you and the older person. If the relationship is based on mutuality there will be a give and take between the two people which will reflect individual needs. A successful relationship is one in which each person is giving what they want to give and receiving what they need. This will be different for each friendship and the value of each relationship can only be judged by the people participating in it.

#### Examples of Relationships

Most relationships are intergenerational although volunteers can be of any age. You may wonder what you will get out of the relationship with the older person? When some volunteers were asked what they got out of the

relationship, the responses included the following:

"A friend...makes me feel important."

"I like to get her opinion on things because she has a different viewpoint."

"It gives me a lift to visit her because she is always up and articulate and I learn from her."

"I benefit from her experience, warmth and the enjoyment of her company."

"I get good advice...emotional support"

"I get the same things that she gets. I have a friend. I get advice, I laugh and have fun."

Older people responded in much the same way by saying the following:

"I feel as though she's a good friend of mine."

"I feel that I'm still part of the world. [My friend] has a liking for me as a person which gives me a sense of worth."

"I feel a warmth and an understanding. I can ask her questions about anything and she will understand."

"She's very spirited. I share her experiences."

"I feel I'm not alone...that someone is interested in me."

As you can see, each feels they are benefiting from the friendship. The goal of the Friendly Visiting Program is to encourage mutuality within the relationship, which will ultimately lead to friendship. Some of the older people felt that the sharing of everyday experiences was an important component of the relationship. Others felt

good about being included in the family life of their friend or attending social functions. Talking about current events, movies or television programs also contribute to an exchange of ideas. Try to find out if your friend has interests that you might share together such as music, literature, cooking, et cetera. As you talk, you will probably find the difference in ages becomes less important. Once relationships are established, most volunteers and older people do not feel that there are any generational differences or gaps.

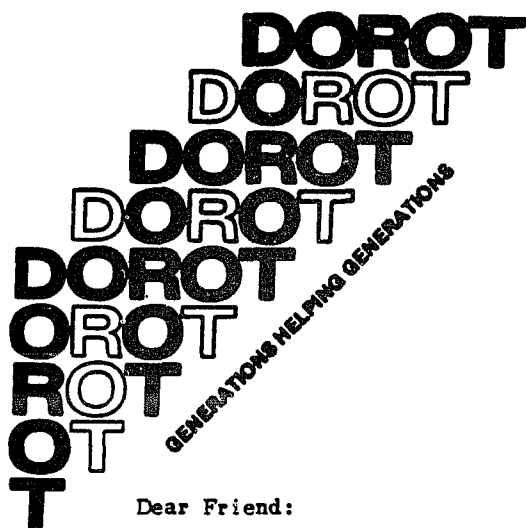
#### Role of the Agency and Professional

The agency is the author of the Friendly Visiting Program and sets certain goals and objectives which it hopes to reach through it. Programs are designed to meet the needs of a target population; in this case, homebound, isolated elderly people. The agency feels that a one-to-one relationship based on mutuality is the best way to reduce isolation and improve the self-worth of older people who may have few other avenues of expression. You, the volunteer, become an arm of the agency and must abide by the rules and regulations set down by agency personnel.

The professional worker and volunteer carry out the program goals together. The social worker is always available for consultation and guidance and should be kept informed of any changes in the relationship. A professional can

make the determination of whether a referral is needed for additional services and what issues can be handled by you. From time to time you may have questions about what you should do or how you should handle a situation. It is important that you call an agency social worker to discuss your concerns. It is in the best interest of your friend that the agency be kept informed of any potential problems. The Friendly Visiting Program is based on a cooperative effort involving the agency, professional worker, volunteer and older person. It is based on mutuality of exchange in order to foster self-respect and to promote friendship and caring between older people and concerned volunteers in the community.

In this day and age of impersonal contacts, isolation and lack of concern with ones fellow man, it is heart-warming to meet people like yourself who are so generous with your time and emotions. One person can make a difference in the life of another. It is hoped that your gift of caring will be returned tenfold and your experience remembered forever.

APPENDIX A

May, 1986

Dear Friend:

With each passing year DOROT continues to grow and develop special friendships with people like you. As we look to the future we must reflect on the past to ensure that we grow together.

We are looking to you, our long time friends, to get your feedback and better understand the nature of relationships between different generations.

Wendy Steele, a DOROT volunteer, will be contacting you within the next few weeks to set up an appointment either in your home or by telephone. She would like to spend about 30 minutes conducting a confidential interview.

We hope that you will agree to participate and look forward to sharing the results of this survey with you.

With warm regards,

Sheila Hochman  
Assistant Director  
Community Service

SH:jc



SECTION II

What do you talk about with your friend?:

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TOPIC	NO	YES	EXPLAIN
Currents events			
Cultural events			
Health problems			
Family			
Religion			
Fears			
Death			
Past experiences			
Personal life			
Loneliness			
Generational differences			
Advice			
Other			

Comments: \_\_\_\_\_

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What kinds of things do you do with your "friend"?

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TOPIC	NO	YES	EXPLAIN
Cooking			
Reading			
Play games			
Singing or playing Instruments			
Eating			
Writing letters			
Errands			
Attend social events (movies, concerts, religious services)			
DOROT events			
Walking			
Shopping			
Visiting others (friends or family)			
Other			

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What is the most important thing you do with your friend? Why?:

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SECTION III

What do you feel you get out of the relationship? On an emotional level, what does your friend do for you? Do you feel better about yourself because of the relationship?

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What do you think your friend gets out of the relationship? What do you feel you give your friend on an emotional level? Do you think she feels better about herself because of the relationship?

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What were your expectations of the relationship? What did you expect to get out of the relationship? What would you like to get out of the relationship? If you were planning a program like this what would you like to see happen in a relationship?

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How long do you anticipate this relationship to continue? Under what circumstances would you discontinue the relationship? (External or internal factors). Would you start another relationship if this one ended?

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SECTION IV

I am going to read you several statements. Please indicate how you feel about the following statements as it pertains to your relationship with your DOROT friend: (Code: Agree, VI-very Important, MI-moderately important, SI-somewhat important)

	AGR.	UNDEC.	DISA.
1. My friend keeps me company.			
2. I help her understand my generation.			
3. We keep each other from getting lonely.			
4. We share our feelings and thoughts with each other.			
5. She helps me more than I help her.			
6. I provide a role model for her.			
7. She helps me understand her generation.			
8. We keep each other company.			
9. I feel I have something to offer my friend.			
10. I feel asking for help is a sign of weakness.			
11. Life would be more difficult without her.			
12. My friend does things for me.			
13. The relationship is mutually rewarding.			
14. We give each other an understanding of the other's generation.			
15. It is important that my friend be of the same religion as I am.			
16. I help her more than she helps me.			
17. I give my friend advice.			
18. I trust my friend with my confidences.			
19. I feel my friend really cares about me.			
20. I consider my volunteer to be my friend.			
21. I feel dependent on my friend.			
22. My friend fulfills my life in a different way than family.			
23. I feel I can rely on my friend if I need her.			
24. I like the idea that my friend is from another generation.			
25. I would like more contact with the DOROT staff.			
26. I feel my friend is different from other people of her generation.			
27. I would like to see my DOROT "friend" more often.			

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SECTION V

The following questions will help me understand your circumstances better:

What is your ethnicity \_\_\_\_\_

Do you live alone? \_\_\_\_\_

Present marital status \_\_\_\_\_

Have you ever been married? \_\_\_\_\_

Have you ever worked? \_\_\_\_\_

How often do you see your friend? \_\_\_\_\_

How old do you think your friend is? \_\_\_\_\_

What ethnicity is your friend? \_\_\_\_\_

What is the highest grade you completed? \_\_\_\_\_

How would you rate your relationship with your friend?  
excellent\_\_\_ good\_\_\_ fair\_\_\_ poor\_\_\_ . Explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How would you rate your financial status?  
good\_\_\_ fair\_\_\_ poor\_\_\_ . Explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How would you rate your overall physical health?  
good\_\_\_ fair\_\_\_ poor\_\_\_ . Explain: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How would you rate your level of mobility?

good\_\_\_\_ fair\_\_\_\_ poor\_\_\_\_. Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How would you rate your level of hearing?

good\_\_\_\_ fair\_\_\_\_ poor\_\_\_\_. Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How would you rate your level of sight?

good\_\_\_\_ fair\_\_\_\_ poor\_\_\_\_. Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How would you rate your overall mental health?

good\_\_\_\_ fair\_\_\_\_ poor\_\_\_\_. Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you consider your contacts with your family to be frequent\_\_\_\_  
occasional\_\_\_\_ not at all\_\_\_\_. Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you have people other than your DOROT "friend" visit with  
you?

yes\_\_\_\_ no\_\_\_\_. Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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