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PRELIMINARY REPORT

on the

OLD AGE SURVEY "PILOT STUDY"

Technically speaking, the interviews which are discussed in this report do not constitute a "pilot study." A "pilot study" is a testing of an already developed research tool prior to its final intended use, in order to determine its shortcomings. In the present study, no such tool or testing existed. The actual approach was more in the nature of a preliminary survey of the universe, perhaps with the intention of avoiding the necessity of a pilot study prior to the general survey. In the minutes of the Sub-Committee on Study Methods, it is suggested that "a pilot study be established...for the purpose of obtaining a truer picture of what older people want, are beefing about."¹ In the final notes prepared for the instruction of the interviewers, it states that the purpose of the pilot project is "to attempt to discover the needs of older people from the older people themselves ...results will be translated into a questionnaire which will be taken to a statistical sample of the older population early in the fall."² Thus, no actual pilot study was made, but rather, a preliminary survey, and as such, it will be referred to in the following report.

Procedure

Initially, each interview was read for certain factual content related to the characteristics of the sample, such as age, sex, marital status, etc. Following this, meetings were held with each of the interviewers submitting interviews in order to acquire certain facts not reported and to gain insights into some of the content which required further expanding. Only where relative certainty existed was such recall material retained. The interviews were then analyzed for their thematic content---what was talked about and emphasized by the interviewees as reported by the interviewers. This material was organized into a set of categories which seemed to best give the general nature of the interview content.

Comments about the Interview Process:-

Of the original nine interviewers making up the team, six submitted interviews. Reported time per interview ranged from 45 minutes to two hours, with the

¹A sub-committee of the Committee on Problems of the Aging, Edmonton Council of Community Services, dated Jan. 20, 1956.

²Dated May 8, 1956.

average time being one to one and one quarter hours. This does not include the time to make the contact, or to record the interview. The length of the interviews ranged from 21 lines of type to 141 lines, with an average of between 60 and 80 lines. In general, the interviewers found responsive persons with interests based upon (1) genuine concern for problems of the aged (altruistic feelings) and (2) self-interest in immediate gains that might be forthcoming, particularly financial ones. The consensus was that replies were motivated by feelings in the former category. Following instructions, most of the interviews would be described as "non-directive" although there was sufficient mention of the need for questioning to conclude that completely free and spontaneous response did not take place, or was it possible in some instances, as with a senile person. In general, the contact was explained and the purpose of the interview accepted. Five of the six interviewers took a minimum of notes, or none, reconstructing the interview as soon after as convenient. The sixth took notes. In both techniques the interviewers felt that their way was more successful. (Note-taking inhibits, or note-taking lends prestige to what is being said.)

Characteristics of the Sample:-

Following is a brief summary of the characteristics of the subjects interviewed in the preliminary survey:¹

1. Total returned interviews : 43

Accepted.....	39	
Rejected.....	4	(2 were statements about refusals, 1 was 52 yrs, therefore underage, one was an interview of the wife of the intended interviewee)

2. Sex

Male.....	17
Female....	22

3. Age distribution

60-64.....	4
65-69.....	8
70-74.....	10
75-79.....	4
80/.....	3

29 median age of known ages, 70
(10 not known, or approximated)

4. Marital status

Widowed	21
Married, living with spouse.....	14
Single	4

¹Turned in by the postponed due date of August 10, 1956.

5. Dwelling

Owned own home.....	17
Living with children or relatives.....	9
Renting rooms, not with relatives.....	7
Nursing homes, hospitals, other housing, public and private for aged.....	5
Not accounted for.....	1

6. Number of children

Range : 0 - 13

7. Sources of income, total mentions

Some form of pension.....	25
Still working and earning.....	9
Property (rent and other).....	9
Savings.....	7
Old Age Insurance.....	3

8. Church

Did not mention, or stated no affiliation.....21

Scattering of membership in other Protestant groups,
one Roman Catholic, one Jewish, one Greek Orthodox,
one Greek Catholic

9. Independence-dependence (physical)

Independent.....	25
Partially dependent.....	8
Total dependence.....	4

Anglo-Saxon origin dominated the sample, with larger proportions of British than any other extraction. In addition, there were Ukrainian, U.S., Russian, Italian, Hungarian, French, Swedish, Swiss, German and Irish groups represented.

Approximately half of those having children had children in Edmonton, with a third also having grandchildren in the city. There were reports of visits from children living outside of the city, some occurring as frequently as every two weeks.

It is suggested that some follow-up interviews be made before the formulation of the final interview schedule to more satisfactorily cover two categories: (1) institutionalized aged, and (2) Roman Catholic. It will be noted that these two groups seem under-represented for the purposes of the preliminary survey.

Thematic Content

The intent of the preliminary survey was to discover just what things were important to the aged, what things they derive from, and what their problems were. The data then would form the basis for the development of a questionnaire, or schedule, for a final, more comprehensive survey of a much larger sample. Since the

interest was mainly in what was said and in the inferences that could be drawn from the content of the interviews, no statistical analysis was made. Such an attempt would not be meaningful at this stage. In addition, the validity of such a procedure in the predominantly non-directive approach with the interviewers "left on their own" would maximize possibilities for subjective inclusions and exclusions, as well as for the interviewer to attach significance or importance in a degree different from what was intended by the interviewee. Thus, non-additive themes might result, even though the same topic were discussed. The following descriptions, then, represent the content of the interviews according to dominant themes that were reported. Of importance in selection was frequency of mentions, as well as inferred significance for the final survey. Presentation of the themes is in categories, which in turn are grouped into more general areas.

A. The Situation Itself

1. Health:- In terms of the number of times mentioned, health was one of the three most frequently discussed themes. Both positive and negative statements were made, but even the positive statements indicated the presence of some concern in the event that health should be lost. Content ranged from feelings of those who were completely incapacitated by illness to those who stated that they "never had a sick day in their lives." A major aspect was anticipation of the time when illness might strike, especially in terms of what it would do to a marginal financial position. It is not health per se which seems to be the worry, but its relationship to finances, work, and other activities which become restricted. It is felt that a person enjoying good health may have as many worries as one who has a series of illnesses, and who has learned to cope with, adjust to, or accept them. Not being able to accept an illness and failure to realize that aged do not recover, or recover more slowly, caused a number of anxieties. Being unable to reconcile present poor health with past physical condition was also an important theme.

The reactions to poor health problems were varied, and included frustration, resignation, acceptance, anxiety, avoidance, and depression.

2. Financial situation:- The aspect of finances most frequently mentioned was the inadequacy of various pension arrangements. These did not allow for a "normal" or permit any form of minimal luxury or recreation. Significant numbers pointed out injustices in the pension system, namely the means test, medical expenses have to be paid for by the pensioner, penalties that seemed to be attached to being partially self supporting, and so on. Loss of a proportion of the pension if one worked, or

rented rooms, were specific citations of what was felt to be injustice in this area. Of particular concern was the effect of medical bills on limited pensions at a time when earnings were decreasing and health becoming a greater problem and expense. A few mentioned the increasing cost of living as "cheapening" the pension, feeling that adjustments of greater magnitude should be made. A few felt that those who were financially well off deserved it because of thrift and hard work in the past, while those who were not well off had only themselves to blame.

3. Dwelling Situation:- The idea of primary importance expressed here was the satisfaction felt by those owning their own residences, regardless of their condition or location. Ownership led to feelings of independence and security. Some expressed concern regarding changes taking place in the neighborhood, with special mention of traffic, increased noise, businesses and general deterioration. For those not owning homes, primary importance was attached to the necessity of having privacy--a place to call your own. There was satisfaction from the possession of personal items retained from the past, such as furniture, knick-knacks, etc. The underlying theme seemed to be the importance of regulating one's life pattern, having visitors when desired, coming and going when one wanted to, and being your own boss in general.

4. Family Relations:- Range of thought on this theme went from description of solid family relations involving frequent contacts to the feeling of actual rejection or being "forsaken" by the children. The presence of children in the city was important and mentioned in about one-half of the interviews. In those cases where positive relations existed, this fact was of major importance. The presence of grandchildren lent a new life to the family relations, in which the aged could begin another "family cycle" even if only in part. A problem that appeared was the domination of the aged by the children, especially in instances where the parent was dependent upon the children for care and was living with them. The reverse situation was where a spouse or child was dependent upon the aged person, resulting in a drain on energies and resources. Also mentioned were situations where marital ties were strong, and there was concern at this age about what would happen should one of the mates be lost. This parallels the feeling about healthy people not prepared for the loss of health.

5. Life History:- Themes here centered about nostalgic recall of better times, pride in a hard past life--a sort of "enjoyment of the struggle" theme--, activities which in the past brought satisfaction and are now curtailed, thus

frustrating the individual, and the feeling that in some cases present conditions are the result of the past, i.e., poor health now is the result of past overwork. There were pro's and con's about recalling the past, some feeling that one could learn from it, while others felt that it should not be dwelt upon. Inability to reconcile present conditions with past ones was a problem to a number of interviewees.

B. Activities

6. Individual Activities:- Gardening was by far the most popular activity mentioned by the interviewees. This could perhaps be accounted for by the time of the survey. Since the growing season is such a small part of the total year, perhaps a question relating to substitute activities during the winter months should have been asked. Other individual activities included wood-working, reading, radio, travel and needlework. Significant are the things which were not mentioned, especially those in the cultural area, such as art, concerts, music, movies, sporting events, etc. A few spoke of the lack of concerts and recreational facilities. Either individual activities are not important, or the non-directive approach is not conducive to a listing of such activities for the interviewer.

7. Social Activities:- By far, visiting, both going out and receiving visitors, was the most popular type of social activity. Clubs, lodges, church groups, cards and bingo also made up an important proportion of the activities. It is not known if these latter activities were entered into for their own sake, or because contacts with others were made possible. Certain forms of social recreation, such as dancing and participation in milder forms of sports received no mentions, although one suggested that there should be more facilities for horseshoes and checkers in the parks. Another's sole form of social recreation seemed to consist in watching billiard games by the hour. As with category 6, above, it is felt that many activities might not have been elicited by a non-directive approach, and no conclusions should be reached about the activities of the aged from this sample.

8. Church:- Twenty-one of those interviewed either did not mention church or related activities, or stated that they did not now participate. Of those who did report church activity, four types of responses were dominant. In some instances the person's religion gave strength for facing present problems. The second type of comment involved the role the church plays in providing an opportunity for contacts with friends through various church groups. A third theme was the desire to attend church, but being prevented by poor health. Fourth was a critical type of response, related to the idea that the churches were not fulfilling their function, and that

ministers should visit the confined more frequently.

9. Transportation:- By and large, transportation is a means to an end, although in some cases it does become an end in itself. Not much appeared in this category which could be referred to as a problem. A few of the respondents owned their own car and drove. There was a degree of satisfaction from this related to freedom of movement, and being able to get out and go when it was desired. Some of the respondents were driven by friends, some used public transportation, and others just did not go out much. While it might be anticipated that transportation would be a problem because of decreasing health, finances, etc., possibly the desire to go places decreases as the inability to transport oneself decreases. There was no instance reported in which this inability was a need or a problem for the interviewee.

C. Some Psychological Aspects

10. Independence:- This subject was of vital importance and included three overlapping aspects of independence: health, financial, and social. In some cases discreteness of the themes did not exist, as for instance, being independent in terms of health also implied that one could be independent in terms of finances and social matters. In a number of cases independence was desired even though marginal living resulted. There were situations where the family was willing and able to take on such responsibilities, but where such was refused. A few cases existed where it seemed that psychological satisfaction was derived from being dependent, this substituting for loss of meaningful contacts and loss of role and status. In most cases, however, those who were dependent on others felt it and resented it. Rejection of charity, or anything resembling charity, was emphasized. The theme of independence, regardless of what the feeling state is based upon, seemed to be a necessary factor in a satisfactory adjustment to being aged.

11. Personal Habits and Prejudices:- This category includes individual behavior patterns of sufficient importance that they were mentioned by the respondent. It suggests that in types of facilities now available, or that may be created, rules and regulations may require a modification of an intended resident's life pattern. This may be anxiety-producing, and of sufficient importance that the whole concept of "homes" or related facilities is rejected. For instance, as reported by the interviewers, the person who has been accustomed to sleeping until 11:00 A.M. every morning, or the person who desires to retain possession of certain pieces of furniture, which is not possible in limited quarters, or a person who is accustomed to a certain type of diet, or to "snacking" or to breakfast in bed, or having a pet, will be

concerned about changes necessitated by some form of institutional living. In addition, negative feelings about such things as smoking or card playing, might lead to a desire to avoid situations where this could occur. Just what these personal habits are, how important they are, and how they might relate to various proposed facilities might be a crucial factor in the planning of such facilities. Personal characteristics, such as certain political beliefs, or feelings about immigrants, might result in the inability to adjust in certain situations found in institutions where majority feelings and opinions are different.

In several cases a language problem was involved. What this means insofar as the person's relations with others in the neighborhood is concerned is not known. It also points up the need that the final survey will have to have available persons who can meaningfully interpret the study to individuals of this group who might be included in the sample.

12. Wants and Needs:- These are things the aged find unsatisfactory in their present situation, and although overlapping a number of previously described categories, as implied in statements about dwelling, finances and independence, should be specified here. Two are outstanding in the present preliminary survey, and stand almost as continuing life goals. One relates to being able to continue in some useful, contributing activity, either in the form of part-time work, or by helping others. General resentment at retirement was felt, along with feelings that it was arbitrary, unjust, and not consistent throughout the various occupations and income brackets. Some were forced to retire who were in worse financial difficulties than others, and therefore resent those better off being able to continue work. Unlike the findings in the Winnipeg study, work was desired for its own sake, not just for financial gain, by many respondents.

The second major theme in this category was wanting to have friends, to avoid loneliness, and the desire for companionship. It is also in the nature of a life goal, involving the wish for acceptance and belonging, and for the maintenance of past relationships.

13. Satisfactions:- Too frequently in surveys of this sort, only problems, wants or needs are studied. However, much can be learned from the satisfactions voiced by aged persons, and perhaps ultimately, enough will be learned so that some "formula" may be developed which will serve to maximize what can be called for want of more precise terminology "happiness" at this particular age level. Summarizing what has been mentioned previously, ownership of home, health, and independence were

the major satisfactions expressed. In addition, friendships, having something to do, close family relations, and memories of past life were also important in making a satisfactory adjustment to old age in the present.

D. The General Problem of the Aged

14. Attitude toward the Survey:- Themes in this category give some insight into the manner in which the interviewees view the general problem of the aged, particularly their interest or lack of interest in it. There was general cooperation, in some cases, eagerness, regarding presentation of views. Satisfaction was expressed that "people" were interested in, and wanted to do something about, the problem of the aged. Several interviewers remarked about the initial suspicion of the interviewees that had to be overcome, a difficult task in a short, single-contact interview situation. Some respondents objected to being selected as member of the "aged" or "old" group. There was some difficulty in several cases about getting across an understanding of the purpose of the interview, particularly in cases where the individuals seemed to be especially concerned about financial matters. (These points should result in some suggestions relative to publicity, approach, communication, etc., on the final survey.) Finally, the presence of a third party usually had a detrimental effect on the interview, especially in cases where some dominance and dependence were present.

15. General Situation of Aged Friends or Acquaintances:- The themes here represented both direct knowledge and hearsay, and were not too well-defined. It is felt that some insights may be derived and developed. By determining how the aged feel concerning the general situation of friends and acquaintances, one can arrive at what the aged regard as important in their own situations, but be unwilling to talk about it. This involves projection and identification---a process of "de-personalizing" certain ego-involved aspects of the individual's life. In general, statements in this category were used as evidence for attitudes about facilities for the aged (see category 19), and the general roles and statuses of the aged in the community. Major points here were the isolation of the old people from the community, lack of contact with others, and the pride and independence of the aged in general. In the latter case, this sometimes was harmful to the individual, who went without, rather than accepting help. One interviewee stated that such persons should be forced to accept assistance. Being "at loose ends" and not having enough to do were also descriptions used for the general situation of the aged.

16. Public Attitudes Toward the Aged:- How the aged feel they are viewed by the rest of the community again gives insight, although somewhat indirectly, into what the aged need and are concerned about. As with category 15, the individual is able to voice personal thoughts without necessarily bringing himself into the picture as the focus of public attitudes. Statements were made as to how people took advantage of them, that they feel and are rejected, that both the government and the community have forsaken them, that they bore people, and that they are looked down upon by those working when they are unable to continue work. Such feelings are not conducive to any outward turning of life at this, or any age. (See also category 17 below.) The fact of the survey being made and the younger persons making it might serve to modify some of these attitudes, as evidenced in the statements made in category 14, above.

17. Attitudes of the Aged Toward the Young:- Two conflicting views developed here. One involved liking the young, and desiring to be with them ("keeps you young yourself"). The other view was the desire, not so much to avoid, but to minimize contacts with the young, or at least have them at a time and place of one's own choosing. Lack of common interests, insufficient energy ("pep"), and lack of understanding were reasons advanced for this feeling. (This has important implications insofar as living with children is concerned.) Feelings that some young were cruel to older people, that they reject older people, do not care enough, etc., were manifested. On the other side, some remarked that the young had their own problems and just couldn't be bothered. These feelings represent matters of personal preference and ability to adjust.

18. Responsibility for the Aged:- A large proportion of the interviewees expressed ideas about responsibility for the aged. In regard to the government, ideas ranged from acceptance of the government's role, to demands that it be expanded. The terms "rights," "obligations," and other implying that such assistance had been earned, appeared, especially in relation to housing, pensions, and medical assistance. A second theme was that the aged should take care of themselves, and that they should have prepared for old age in the past. There was some mention of children have the responsibility, as in cases where the person made a comment about being "forsaken." Acceptance of the role of service clubs and churches in caring for the aged existed, accompanied by an understanding that these groups could not do it alone.

19. Facilities and Services for the Aged:- This category of themes received more discussion than any of the others, and because it is so important,

merits fuller discussion outside of this initial report. In the final study it will be crucial, both in terms of positive desires (wants) on the part of the aged and in terms of criticisms of present facilities.. Comments were received in the areas of housing, services, and other facilities, such as recreational opportunities. Two groups of responses were apparent, those who accepted some form of institutional care or help (although those favoring cottage or suite plans did not seem to regard these as "institutions") and those who would not accept institutional care or help. In addition, there were those who rejected help from children, and either accepted some form of institutional care as the lesser evil, or would attempt to remain independent.

Descriptions of the desired facilities were influenced by considerations already mentioned, namely, cost to the individual, privacy, having space, opportunity to entertain friends, flexibility of rules to allow continuation of personal habits, etc. Presence of a "common room" was advocated for various types of living arrangements. Great concern was voiced about the cottage system and the requirement that a widowed person had to leave. The desirability of certain facilities obviously reflected personal tastes. The impression was, however, that if the person could have a portion of his past life pattern reproduced in whatever dwelling situation, there would be a relative degree of contentedness.

Mention was also made of the need for reduced prices on various forms of recreation, sports and other commercial activities, to allow participation by those on limited budgets. Reduced prices on expensive physical aids, such as for hearing, was also mentioned.

20. Feelings about the Future:- Insight into general orientation is obtained from statements about the future. These ranged from feelings that the individual had little to look forward to, resignation, passive acceptance, lack of will regarding the future, waiting for death, and avoidance, to feelings of security, optimism and even anticipation. These attitudes obviously reflect the person's own past life orientation coupled with his present situation. In some cases, the attitudes seem so deeply ingrained that little could be changed by whatever services or facilities that might become available. The basis for these attitudes are formed some ~~period of time prior to retirement.~~

Concluding Remarks

In general, the problems and needs of the aged are no different from any other segment of the population. There are certain basic physical requirements that must be met for survival; there are certain minimal standards of health and decency

that are demanded in contemporary society; and a degree of luxury is not only recommended, but expected. There is no secret, as yet undiscovered "problem of the aged." Rather, the need is to find the particular aspects, quantities, and characteristics of these requirements and standards that seem necessary for aged people. The differences seem to lie in degree, rather than kind. The purpose of the preliminary survey of the universe was to ascertain just what old people were concerned about. The results demonstrate some of these concerns, and as can be seen, they are not unique to the aged. It is how they are viewed at that particular age level that is important, and the various degrees of importance attached to certain of the themes that makes for differences. The aim of assisting the aged is not to provide basic, physical survival prerequisites, but to provide those things, within limitations of time and resources, that are acceptable to, and satisfying for, the aged themselves.

The whole question of "needs"---what they are, and by whose definition---requires clarification, as does the question of what constitutes "a problem." There are needs that can be classified as life goals or objectives; there are needs that are merely means to these ends; there are needs as seen by the person himself; and there are needs that technicians in the field attribute to certain situations. Ends and means must be defined as a preliminary step in attempting to ascertain the nature of the problem of the aged. The use of the terms "needs" and "problems" in the final survey will require careful definition if confusion in the analysis is to be avoided.

In regard to the non-directive approach used in the preliminary survey, the underlying assumption is that what is said is of primary importance to the individual. This is probably true, but sometimes this "importance" is of a different order than that anticipated in a survey of this sort, requiring, instead, psychoanalytic analysis to discover meaning and motivation. It was difficult in most cases to determine just how much of the interview and what points were spontaneous, and what had to be elicited by "neutral" probes. While this would be significant in a depth analysis of the interviews, it is not for the present purposes, namely, uncovering a range of themes.

Some resistance to talking about worries, because they might not be interesting, or nothing could (or would) be done about them, or it was a sensitive area, was encountered. This represents certain generalized feelings about the attitude of people toward the aged, as well as understandable desires not to reveal intimate aspects of one's life. What this implies with regard to the completeness of response in a generally non-directive interview is left for further consideration elsewhere, perhaps in a general discussion related to planning the final survey.

As pointed out, activities seemed to be underreported. In addition, it is understood that the number of institutionalized persons will be expanded so as to give them a better representation for the final report on this phase of the survey.

Finally, the delimitations of the categories are by no means final, nor are they fixed with regard to inclusions at this point. It is hoped that discussions with the interviewers prior to the final report on the preliminary survey will result in a clearer idea of the nature of the thematic content, thus providing a more sound basis for the construction of the questionnaire.

It might also be noted that the final report will include a weighting of the themes, as well as a selection of typical comments under each.

Appendix 1. Listing of Thematic Categories

A. Situation

1. Health
2. Finances
3. Dwelling
4. Family Relations
5. Life History

B. Activities

6. Individual Activities
7. Social Activities
8. Church
9. Transportation

C. Some Psychological Aspects

10. Independence
11. Personal Habits and Prejudices
12. Wants and Needs
13. Satisfactions

D. The General Problem of the Aged

14. Attitude Toward the Survey
15. General Situation of Aged Friends and Acquaintances
16. Public Attitudes Toward the Aged
17. Attitudes of the Aged Toward the Young
18. Responsibility for the Aged
19. Facilities and Services for the Aged
20. Feelings about the Future

Appendix 2. Typical Comments and Quotations

(To be included in final report on preliminary survey)

Appendix 3. Weighting of Categories

(In terms of time mentioned, to be included in final report)