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## Abstract

We investigated the extent to which earlier life experiences with informal and formal services might influence older adults' views of getting assistance in the future. In a short-term longitudinal follow up of telephone interviews with a representative sample of rural, community dwelling elders ( $N = 532$ ), we conducted face-to-face interviews with a subsample ( $n = 84$ ) who were originally receiving informal assistance only, formal services only, both forms of support, or no assistance. We examined changes in assistance over 18 months and inquired about previous and current use of community resources (restaurants, hired help, overnight travel), home-based nursing or personal care, and formal services, as well as plans for future care needs. Past and current acceptance of external (nonfamilial) sources of support are associated with willingness to rely on formal services in the future. However, most participants expressed a strong preference for maintaining as independent a lifestyle as possible, even while expecting a need for greater assistance in the future. Whereas a minority have made arrangements for some type of formal care such as long term care insurance or nursing home placement, most intend to rely on family members for help. Few endorse depending on friends, neighbors, or other informal helpers except for occasional assistance. The results of this study have implications for research and public education on family caregiving, as well as for planning and delivery of informal and formal community services in rural areas.

## Sample & Methods

Representative sample of 4,050 adults aged 65+ living in their own homes in 17 rural southwest Virginia counties; 2,034 interviewed

T1: PHONE SURVEY (+ 18 mo.) T2: FACE-TO-FACE INTERVIEWS

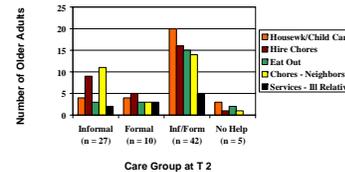
- 1,502 Had No Care Needs
- 532 With ADL/IADL Limitations
 

|                                   |    |
|-----------------------------------|----|
| Subsample of 84                   |    |
| 318 – Informal Help Only (I)      | 20 |
| 63 – Formal Help Only (F)         | 24 |
| 87 – Informal & Formal Help (I/F) | 21 |
| 64 – No Help (NH)                 | 19 |

### Structured and Open-ended Questions

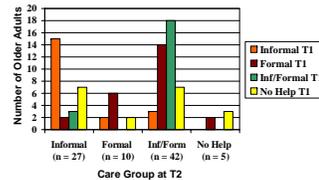
- Quality of Life, Health
- Current Assistance, Expectations for Future
- Informal Helpers and Formal Services
- Psychological Well being, Filial Responsibility Expectations
- Previous Experiences w/ Hired Services, Attitudes about Community Services

## Previous Help/Support Experience



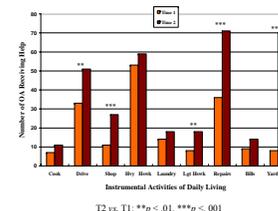
- Hypothesis: Use of nonfamily resources in the past predisposes individuals to accept community services in old age
- Care-receiving groups differed in use of nonfamily resources in the past, notably, housework/child care ( $X^2 = 8.38, df = 3, p = .04$ )
- The more nonfamily resources used in the past (sum of 5), the greater the likelihood of using formal services in the future (sum of 7) ( $r = .23, p = .04$ )

## Change Over Time



- T1 Informal was 75% stable at T2
- T1 Formal tended to change (75%) to Informal/Formal (58%) at T2
- T1 Informal/Formal was 86% stable at T2
- T1 No Help tended to change (84%) to Informal (37%) or Informal/Formal (37%) at T2

- IADL help needs increased ( $M_s = 2.45 \text{ \& } 4.21, t = 7.00, p = .00$ )
- ADL help needs increased ( $M_s = .42 \text{ \& } .69, t = 1.77, p = .08$ )
- T2 needs were higher for driving (D), shopping (S), light house work (HW), home repairs (HR), yard work (YW)
  - Informal: HR, YW
  - Formal: YW
  - Inf/For: D, S, HW, HR, YW
- I, F, & I/F > NH on sum of T2 heavy HW, HR, and YW ( $F = 8.70, p = .00$ )



## Comments about Help/Support

### Influence of Past Experiences

- "I worked in a nursing home for years, and when I think of having to go there I just don't like the idea. [The workers] have their own lives, family, responsibilities, and they just don't have time to help other people as much as they want to." (age 75, NH → I)
- "I don't want [family] to take care of me, it's too hard. I took care of my mother, and it's too hard. I would rather go to a nursing home." (age 73, I)

### Views of Formal Services

- "I would rather hire somebody or [pay relatives] to do something than feel obligated to that person." (age 83, F → I/F)
- "If it was one of my friends that come in and washed dishes or something, I would not think nothing about it, but to have strangers come in, well, I just don't want to turn nobody loose in my house." (age 73, NH → I)
- "In my case it's the two boys and it definitely would matter [who helps]. I think a community agency would be less personal and you wouldn't feel as embarrassed." (age 76, NH → I)

### Reluctance to Impose on Family & Friends

- "I would not want to disrupt [friends'] lives, and I know they would be perfectly willing. But I am afraid I would become aggressively more dependent and the frequency of my requests would increase and soon they would be looking at the caller ID and seeing my name and be, 'Oh my God, what now, what now, it's the 6th time today.'" (age 66, F)
- "If [family] have got children at home to take care of, I think they need to take care of them first, then [me] maybe. I think their [children] should come first." (age 74, NH → F)

## Conclusions

- The change from T1 to T2 within the Formal Only group was to add informal sources of help. These elders had been in the best health of all groups at T1 and were maintaining a sense of independence by purchasing services, but as their needs increased they had to begin to rely on family. This situation is opposite the usual assumption of a trajectory from informal to formal forms of assistance as limitations increase.
- Those in the No Help group at T1 had needs, but were not getting help. At T2, their needs had not changed, but they had begun to receive assistance.
- Results demonstrate the importance of moving beyond the traditional focus on health-related assistance to studying the full range of needs and support.
- Different forms of support elicit different responses, and "personal" tasks extend beyond toileting and bathing: Elders prefer nonfamily members to help with those, but want family members to help with cooking and shopping, which are also viewed as "personal."
- Dichotomous comparisons (formal vs. informal) and unidimensional conceptualizations (caregiving is burdensome; caregiving for old people is different from interdependence earlier in life) mask the complexities of perceptions, attitudes, and experiences revealed by in-depth and detailed questioning.