



**WESTERN
MICHIGAN**
UNIVERSITY

The Journal of Sociology & Social Welfare

Volume 18
Issue 3 *September*

Article 10

June 1991

Social Support for the Black Elderly: Is There a Link between Informal and Formal Assistance?

Susie A. Spence
University of Alabama

Follow this and additional works at: <https://scholarworks.wmich.edu/jssw>



Part of the Race and Ethnicity Commons, and the Social Work Commons

Recommended Citation

Spence, Susie A. (1991) "Social Support for the Black Elderly: Is There a Link between Informal and Formal Assistance?," *The Journal of Sociology & Social Welfare*: Vol. 18 : Iss. 3 , Article 10.

Available at: <https://scholarworks.wmich.edu/jssw/vol18/iss3/10>

This Article is brought to you by the Western Michigan University School of Social Work. For more information, please contact wmu-scholarworks@wmich.edu.



**WESTERN
MICHIGAN**
UNIVERSITY

Social Support for the Black Elderly: Is There a Link between Informal and Formal Assistance?

SUSIE A. SPENCE

The University of Alabama
School of Social Work

This study explores informal and formal social support among a sample of elderly southern Blacks. The results reveal that all respondents received informal assistance and that while overall formal assistance was low, a number of respondents received support from both sources. The author discusses these findings in relation to the supplement model of elderly social support and their implications for social service providers.

Previous research suggests that the Black elderly's informal networks are particularly important because they provide substantial supportive services (Chatters, Taylor, and Jackson, 1986; Krishef and Yoelin, 1981). Jackson (1971) classifies these services as instrumental (e.g., grocery shopping and transportation) and affective (e.g., advice and encouragement). While attention has been devoted to assistance provided by the Black elderly's informal networks, there is limited discussion about the relationship between their informal support and assistance available through formal agencies.

This study explores the role of the Black elderly's informal networks in providing assistance, their use of formal community-based social services, and the relationship between informal and formal assistance.

Informal-Formal Service Linkage Models

The gerontological literature generally identifies four competing models to explain the relationship between informal and formal assistance provided the elderly. These models are substitute model, the complement model, the kin independent model, and the supplement model. The substitute model suggests that

formal services replace informal assistance (Greene, 1983). The formal system intervenes when informal caregivers are unavailable or unable to meet the service needs of their elders. While little research supports this model (Greene, 1983; Stoller, 1989), the potential for a shift to total elderly dependence on the formal system is a major concern of policy makers who anticipate less informal support because of changing work and residential trends (Jackson, 1980; Kivett, 1985; Shanas, 1979).

The complement model suggests that both informal and formal systems are structured to provide certain types of services which respond to different needs of the elderly. The informal structure provides nontechnical, nonroutine, and unpredictable services, while the formal system provides technical, routine, and predictable services (Litwak, 1985).

A number of studies are consistent with the complement model. For example, Noelker and Bass (1989) found that informal caregivers provided their elders personal care, while the formal system provided home health care. Krishef and Yoelin (1981) found that while older Blacks and Whites in the rural South relied primarily on the formal system for health care and limited income maintenance, they depended on their informal networks for other services.

The kin independent model maintains that there is no relationship between the informal support system of older persons and the formal service delivery system. The informal system is viewed essentially as the sole provider of services to older people (Noelker and Bass, 1989; Wagner and Keast, 1981).

A number of studies support the kin independent model, but their explanations for the nonexistent relationship differ. For example, some studies indicate that informal networks of older persons inhibit access to the formal service system (O'Brien and Wagner, 1980; Wagner and Keast, 1981). Other studies point to the beliefs and cultural values of older persons as factors that prevent formal service use (Gaitz, 1974; Karcher and Karcher, 1980; Moen; 1978).

While the kin independent model has not been explicitly discussed in relation to support systems of ethnic minority elderly, there are a number of research findings which suggest that it might have some utility (Aschenbrenner, 1973; Bould, Sanborn,

and Reif, 1986; Gordon, 1979; Mindel, Wright, and Starrett, 1986; Chatters, Taylor, and Jackson, 1986). Adams (1980) reported that most of his sample of African-Americans, Japanese-Americans, and Latin Americans preferred caring for themselves or making service arrangements within their informal networks. Chatters, et al. (1986) found that among older Blacks, the daughter was the most frequently desired helper. Forty-one percent of their sample expressed a preference for help from a daughter, 37.2% showed preference for a son, and 32.8% selected the spouse as the desirable helper. Others expressed preferences for a sister (28.7%), brother (20%), friend (19%), neighbor (11.9), mother (5.5%), or father (1%).

Other research attributes different attitudinal factors to nonuse of service by the Black elderly. Among these are the perception of formal assistance as a form of charity, and a level of skepticism about acceptance by a system that has historically employed discriminatory practices (Dancy, 1980; Jackson, 1972).

Structural and functional characteristics within the formal service system have also been identified as barriers to services for older ethnic minorities (Die and Seelbach, 1988; Holmes, Holmes, Steinbach, Hausner, and Rocheleau, 1979; Lee, 1987). Holmes et al. (1979) found that the lack of adequate ethnic representation within the service system and the absence of community-based services contributed to nonuse by elderly Blacks, Hispanics, and Asian Americans. Other inhibiting factors reported are inadequate dissemination of service information (Die and Seelbach, 1988; Gordon, 1979), inappropriateness of services (Sears and McConalay, 1973; Spence and Atherton, in press), eligibility problems (Spence, in press), and the negative attitudes of service providers (Dancy, 1977; Holmes et al. 1979).

Finally, the supplement model posits that the formal system augments the support provided by informal caregivers (Edelman, 1986; Noekler and Bass, 1989). The assumption is that informal caregivers provide substantial care to their elders, and that the formal system intervenes by providing similar services because of a critical need.

Findings from a number of studies (Stoller, 1989; Edelman, 1986) are consistent with the supplement model. Brody (1981)

observed that older women who received a high level of informal support also received more formal services. Similarly, Mindel and Wright (1982) found that formal service use was positively related to informal assistance provided older Blacks and Whites. They explained this finding by suggesting that those individuals who received the most help were in greatest need of assistance.

Methodology

Sample and Sampling Procedures

The study's sample was selected from a population of non-institutionalized older Blacks who resided in a northwestern county in Florida. In the absence of a complete listing of all elderly Blacks in the area, local churches, civic and social organizations, businesses, and informed individuals were contacted for identifying information. The number of individuals identified totalled 1,204 and represented 31% of the elderly Black residents in the county.

A nonprobability purposive sampling procedure was used to ensure adequate representation of the Black elderly with regard to selected background characteristics. While 105 persons were initially selected to participate in the study, the ultimate sample consisted of 100 individuals. Of the nonparticipants, three could not be contacted, and two refused to be interviewed. The data were collected by the researcher between October and December 1986.

Fifty-nine percent of the respondents were female, and 50% were 75 years of age or over. Forty-eight percent were widowed, 31% were married, 10% were divorced, and the remainder were never married or separated. Eighty-one percent of the widowed respondents were female, and 74% of the males were married. Forty-six percent of the respondents attended or completed elementary school, 24% attended and 4% completed high school, 2% attended and 15% completed college, and 9% had no schooling. Fifty-six percent reported individual monthly incomes of under \$400, 33% had incomes between \$400 and \$1,199, and 11% had incomes over \$1,200. Eighty-three percent received social

security benefits and 58% of those respondents also had supplemental security income, pensions or other government benefits. Fifty-six percent of the respondents lived with relatives or other members of their informal network and 44% lived alone. Sixty-eight of the respondents lived in the urban area.

Measurement

Formal service use was dichotomized as use and nonuse. Use was defined as respondents reporting having used one or more of the following six services within the year covered by the study: transportation, homemaker/chore (i.e., house cleaning, washing clothes, cooking, household repairs, and yard work), congregate or group meals, home-delivered meals, day care (protective support during the day), and counselling. Nonuse was defined as respondents reporting not having received any of these services within the period covered by the study.

Informal network assistance was measured by asking the respondents if they had received any of the above six services from the following individuals within the study period: family members, friends, neighbors, and/or other individuals not identified with the formal social service delivery system.

Findings

Use of Formal Services

Formal service use was low, with only 34% of the sample reporting use of one or more of the six services. The lowest percentages of use were found for day care and counselling (2% each). Eleven percent of the respondents reported use of transportation, and 8% stated that they had received home-delivered meals. The percentage of use for the entire homemaker/chore service category was 13%. The highest percentage of use was found for congregate meals (20%).

Informal Assistance

All respondents received some type of informal assistance (one or more of the selected services). Sources of assistance included family, friends, neighbors, and persons identified as

"others." The family ranked first in providing the wide range of selected services, with respondents receiving greatest support for group meals (90%), house cleaning (57%), transportation (54%), cooking (50%), and home-delivered meals (47%). Friends provided the next largest range of services, with respondents receiving greatest assistance with group meals (30%), transportation (27%), counselling (20%) and home-delivered meals (12%). Neighbors and individuals in the "other" category both ranked third in providing support. From friends, respondents primarily received transportation (20%), counselling (17%) group meals (14%), and home-delivered meals (10%). From other individuals, respondents mainly received assistance with household repairs (34%), yardwork (30%), group meals (17%), and house cleaning (8%). Services not provided by neighbors were housing cleaning and cooking and those not provided by other individuals were day care and cooking.

The Relationship between Informal Assistance and Use of Formal Social Services

For analysis purposes, informal network assistance was trichotomized to reflect three levels of assistance provided during the study period: low level of assistance (1–5 services), moderate level of assistance (6–9 services), and a high level of assistance (10 or more services). This classification was used to determine the frequency with which one or more services were provided respondents during the study period. Chi-square was employed to test the relationship between informal and formal assistance. The level of significance was set at .05.

Table 1 shows that only 14.3% of the respondents who received a low degree of informal assistance reported formal service use. In contrast, 41.9% of those who received moderate informal help and 41.4% who received a high degree of informal assistance used formal services.

Discussion and Implications

The findings of this study suggest that the supplement model may help explain social service assistance provided this sample of older Blacks. While overall use of formal service was low,

Table 1

Social Service Utilization (Use and Non-Use) by Informal Network Assistance (N=100)

	INFORMAL NETWORK ASSISTANCE							
	Low		Moderate		High		Total	
	No.	%	No.	%	No.	%	No.	%
Use	4	14.3	18	41.9	12	41.4	34	34.0
Non-Use	24	85.7	25	58.1	17	58.6	66	66.0
Total	28	100.0	43	100.0	29	100.0	100	100.0

$$\chi^2 = 6.73, df = 2, p = .034$$

the similarity of assistance provided respondents who received both informal and formal help and the positive relationship found between these sources lend support to the model.

Among the number of possible factors that may account for the above findings, two are particularly noteworthy. First, the similarity between informal and formal assistance and the positive relationship between these sources may be viewed in relation to the need factor. Respondents who received a greater degree of informal assistance perhaps were in greater need of additional help, a view similar to that reported by Mindel and Wright (1982). Second, these respondents might have been more aware of formal services because of their interactions with informed caregivers and formal service providers in general. The latter notion is consistent with the conclusion drawn by Krout (1983) regarding his study on older whites.

The findings of this study underline the importance of formal and informal assistance for older Blacks. Service providers must, therefore, play a major role in working with informal caregivers to ensure that essential services are made available to this the elderly population. Moreover, service providers must put forth efforts to assure service accessibility for all elderly Blacks in need of assistance. This assurance is particularly important since the use of formal service was low and a number

of nonusers expressed specific problems encountered including: hardships associated with the purchase of services (e.g., homemaker/chore and household repairs); the great demands placed on some informal caregivers, especially the spouse, who usually provided help; and the tension sometimes caused by these demands.

A number of approaches can be used to address the issue of accessibility. Agency outreach with a focus on service awareness would be helpful. Local Black churches, newspapers, and radio stations could serve as disseminators of service information. The addition of more Blacks to service agencies as board members, administrators, supervisors, and case managers might also facilitate awareness and service use. Observations made in relation to the social service delivery system where this study was conducted showed that few Blacks were in positions such as those noted above.

Additional research on community-based assistance provided to older Blacks is needed to determine more definitively the utility of the service models presented in this paper, or to yield information that suggests other service models.

REFERENCES

- Adams, J. (1980). Service arrangements preferred by minority elderly: A cross-cultural survey. *Journal of Gerontological Social Work, 3*, 39-7.
- Aschenbrenner, J. (1973). Extended families among Black Americans. *Journal of Comparative Family Studies, 4*, 257-268.
- Bould, S., Saborn, B. & Reif. (1989). *Eighty-five plus: The oldest old*. Belmont, CA: Wadsworth Publishing Co.
- Brody, E. (1981). Women in the middle and family help to older people. *The Gerontologist, 21*, 471-480.
- Chatters, L. M., Taylor, R. J., & Jackson, J. S. (1986). Aged Blacks' choices for an informal helper network. *Journal of Gerontology, 41*, 94-100.
- Dancy, J. (1977). *The Black elderly: A guide for practitioners*. Ann Arbor: University of Michigan/Wayne State University, The Institute of Gerontology.
- Die, A., & Seelbach, W. (1988). Problems, sources of assistance, and knowledge of services among elderly Vietnamese immigrants. *The Gerontologist, 28*, 448-452.
- Edelman, P. (1986). The impact of community care to homebound elderly on provision of informal care, *The Gerontologist, 26*, 263.
- Gaitz, C. (1974). Barriers to the delivery of psychiatric services to the elderly. *the Gerontologist, 14*, 210-214.

- Gordon, J. (1979). Use of aging services by elderly Blacks in Douglas County, *Journal of Minority Aging*, 4, 88–92.
- Greene, P.E. (1983). Substitution between formally and informally provided care for the impaired elderly in the community, *Medical Care*, 21, 609–619.
- Holmes, D., Holmes, M., Steinbach, L., Hausner, T., & Rocheleau, B. (1979). The use of community-based services in long-term care by older persons. *The Gerontologist*, 19, 389–397.
- Jackson, J.J. (1971). Aged Blacks: A Potpourri in the direction of the reduction of inequities. *Phylon*, 32, 260–280.
- Jackson, J.J. (1972). Comparative life styles and family and friend relationships among older Black women. *Family Coordinator*, 21, 477–484.
- Jackson, J. J. (1980). *Minorities and aging*, Belmont, CA: Wadsworth, Inc.
- Karcher, C. J., & Karcher, B. (1980). Higher education and religion: Potential partners in service to rural elderly. *Educational Gerontology: An International Quarterly*, 5, 409–421.
- Kivett, V. (1985). Consanguinity and kin level: Their relative importance to the helping network of older adults. *Journal of Gerontology*, 40, 228–234.
- Krishef, C. & Yoelin, M. (1981). Differential use of informal and formal helping networks among rural elderly Black and White Floridians. *Journal of Gerontological Social Work*, 3, 45–59.
- Krout, J. (1983). Knowledge and use of services by the elderly; A critical review of the literature. *International Journal of Aging and Human Development*, 17, 153–167.
- Lee, J. (1986). Asian American Elderly: A neglected minority group. *Journal of Gerontological Social Work*, 9, 103–116.
- Litwak, E. (1985). *Helping the elderly: The complementary roles of informal networks and formal systems*. NY: Guilford Press.
- Mindel, C. & Wright, R. (1982). The use of social services by Black and White elderly: The role of social support systems. *Journal of Gerontological Social Work*, 4, 107–15.
- Mindel, C., Wright, R., & Starrett, R. (1986). Informal and formal health and social support systems of Black and White elderly: A comparative cost approach, *The Gerontologist*, 18, 475–481.
- Moen, E. (1978). The reluctance of the elderly to accept help. *Social Problems*, 25, 293–303.
- Noelker, L. S., & Bass, D. (1989). Home care for elderly persons: Linkages between formal and informal caregivers. *Journal of Gerontology*, 44, S63–S70.
- O'Brien, J., & Wagner, D. (1980). Help-seeking by the frail elderly: Problems in network analysis. *The Gerontologist*, 20, 78–83.
- Sears, D. O., & McConalay, J. B. (1973). *The politics of violence*. Boston: Houghton-Mifflin.
- Shanas, E. (1979). The family as a social support system in old age. *The Gerontologist*, 19, 169–174.

- Spence, S.A. The Black elderly and community-based social services: A study of service awareness, use, and reasons for nonuse of services. *Families in Society*, (in press).
- Spence, S. A. & Atherton, C. The Black elderly and the social service delivery system: A study of factors influencing the use of community-based services. *The Journal of Gerontological Social Work*, (in press).
- Stroller, E. (1989). Formal services and informal helping: The myth of service substitution. *Journal of Applied Gerontology*, 8, 37-57.
- Wagner, D., & Keast, F. (1981). Informal groups and the elderly: A preliminary examination of the mediation functions. *Research on Aging*, 3, 325-331.