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Title: RESPONSIBILITIES OF AND RECOMMENDATIONS FOR
PREPARATION OF RETIREMENT HOME ADMINISTRATORS

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Specific concern for housing and caring for the elderly has received national attention since the White House Conference on Aging held in 1961. The federal government has provided funds for studying housing needs of the elderly. One alternative is the retirement home which is defined as providing food, shelter and security for the elderly. These facilities require an administrator who understands the special needs of the aged and is a good business manager.

Gerontologists are realizing the advantages of an academic program designed to prepare people to enter the field of retirement home administration. The purpose of this study, therefore, was to identify the responsibilities and problems of and background preparation needed by administrators and to make recommendations for planning an interdisciplinary academic program in Oregon, to qualify individuals for such positions.

A survey of retirement home administrators was made by

questionnaire, sent to 126 administrators in HEW region X. Fifty-one or 40.5 percent were returned and usable. Data showed that facilities in the Northwest are largely under 200 units in size and the majority offer a variety of services. There is little mobility among administrators. Their educational backgrounds are very diverse but the majority have had some college preparation. The fields of preparation most often mentioned were Business Management, Human Relations and Administration. Occupational backgrounds of respondents were also varied but the majority had been business managers, sociologists and ministers, and administrators of various types.

Respondents indicated that they received their greatest satisfaction from serving people. Employee-related problems and "human relations problems with the residents" seemed to cause the most frustration to the administrator. Long-range thinking and planning took up much time for the majority of respondents. Tasks that could be easily delegated appeared to be employee-centered. It appeared that a correlation might exist between the problems reported by the administrator as being most frustrating and how much time he spent and whether or not it was a delegated task. Therefore Pearson's product-moment correlation coefficient was used to analyze the related data by computer. A significant positive correlation was found between the problem of obtaining and maintaining staff and time spent on staff recruitment and termination. A less significant

correlation was found between getting desired production from staff and time spent on dealing with employee problems and in-service training. The relationship between human relations problems with the residents and the delegation of the task of meeting with residents and prospective residents gave a positive but small correlation.

Data showed that professional preparation of retirement home administrators should be concerned with administrative skills, ability to work with and understand people, and business management. The majority of respondents were interested in providing an internship in their facilities and also in attending workshops and seminars to update their skills.

On the basis of the questionnaire data, the curricular patterns of retirement home administration programs now in existence and the availability of applicable courses, recommendations were made. It is hoped that these could serve as a basis for planning an interdisciplinary academic program:

1. This program be offered at either or both the graduate or undergraduate level.
2. That courses from the three major areas reported by the respondents, Business Management, Administration, and Human Relations, be included in the curriculum.
3. The 12 hours of gerontology core courses offered through the Oregon Center for Gerontology be a required part of the academic program.

4. Basic courses in Nutrition and Institution Management be included as a required part of the academic program.
5. Related courses with an emphasis on the needs of the elderly be selected to round out the individual student's preparation.
6. A carefully planned internship be a required part of the academic program.
7. Consideration be given to making available workshops and seminars on retirement home administration on various campuses and other central locations in the Northwest.

Responsibilities of and Recommendations
for Preparation of Retirement
Home Administrators

by

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TABLE OF CONTENTS

	<u>Page</u>
I. INTRODUCTION	1
Need for the Study	2
Purpose of the Study	4
II. REVIEW OF LITERATURE	5
The Retirement Home Administrator	10
Need for Retirement Home Administrators	12
Educational and Training Programs	14
III. PROCEDURE	21
IV. FINDINGS	27
Number and Size of the Facilities	28
Classification of Services	28
Background of the Administrator	30
Role of the Administrator	36
Desirable Educational Preparation for Retirement Home Administrators	43
V. SUMMARY AND RECOMMENDATIONS	52
BIBLIOGRAPHY	64
APPENDICES	
A. Covering Letter and Questionnaire	67
B. Preparation of Data for Computer Analysis Using Pearson's Product- Moment Method	73

LIST OF TABLES

<u>Table</u>		<u>Page</u>
1	Satisfaction gained from position as ranked by administrators.	36
2	Problems or frustrations of retirement home administrators.	38
3	Time spent and delegation of responsibilities of administrators.	39
4	Possible topics for inclusion in an academic program for retirement home administrators.	44

LIST OF FIGURES

<u>Figure</u>		<u>Page</u>
1	Relationship in years in retirement home administration and years at present facility.	31
2	Mobility of retirement home administrators.	31

RESPONSIBILITIES OF AND RECOMMENDATIONS
FOR PREPARATION OF RETIREMENT
HOME ADMINISTRATORS

CHAPTER I

INTRODUCTION

"HONOR THY FATHER AND THY MOTHER." These words, given to Moses and the Children of Israel in the desert, still echo across the centuries to us today. For thousands of years, when life expectancy was scarcely over 40 years, the few who were fortunate enough to live longer were cherished and cared for by their families. They were honored for their experience and esteemed for their longevity.

This situation prevailed until the turn of the twentieth century when medical science succeeded in dramatically increasing man's life span. In 1900 there were three million older Americans, 65 years and over, making up four percent of the total United States population. By April 1970, the U.S. Bureau of the Census (1971, p. 25) indicated that there were 20 million older individuals, comprising 10 percent of the total population. Currently one of every ten Americans is a senior citizen (defined as 65 and over), and the number of aged persons is growing at a rate of 1,000 a day. Since the beginning of the century then, the number of aged persons has increased 438 percent, while the

total population has increased only 136 percent. The U. S. Department of Health, Education and Welfare has estimated that in the 40 years between 1960 and 2000, the aged population will more than double in number, bringing the total to over 30 million people (Beyer, 1965, p. 415-416).

Need for the Study

As people grow older their economic level often declines and Social Security and retirement payments may become their sole source of support (Gordon, 1960, p. 230). They are also prey to a higher incidence of illnesses or physical disabilities. Modest retirement incomes reduce the choice of living arrangements. Reduction of energies also tends to make older people more conscious of location, architecture and design, and medical facilities available. One solution to the dilemma facing many elderly is the construction and organization of housing facilities designed especially for them. These facilities, supported by religious groups, labor unions, fraternal organizations, federal government or as profit making ventures, are increasing in number.

Currently few of these facilities are under the direction of persons trained in the skills needed to understand the special needs of the aged or to provide the kind of supervision required. In the preface to a background paper for the 1961 White House Conference on Aging,

the Special Staff on Aging reported that a third of a million professional and technical workers are now employed in programs serving older people and fewer than 10 to 20 percent of these have had formal preparation for work with older people. Many times a retired minister or priest is pressed into service as an administrator of a religiously sponsored home, even though he may not have any special qualifications for the position. In other situations, social workers, hospital executives or business men are the ones who fill these positions.

Gerontologists and others in the field are realizing the advantages of having an organized academic curriculum, designed to prepare people to enter the field of retirement home administration. The federal government is granting support through the Administration on Aging for career preparation programs at the graduate level in retirement home management. Currently, three universities, the University of Arizona at Tuscon, the University of Michigan at Ann Arbor, and North Texas State University at Denton, have AOA supported programs in retirement home administration,

The Oregon Center for Gerontology located at Eugene, Oregon and the School of Home Economics, Oregon State University, Corvallis, are uniquely qualified to offer a program of the aforementioned type in the state of Oregon. An Institution Management program in the School of Home Economics is already in existence at Oregon State University. By broadening the scope of this food service

program to include the interdisciplinary gerontology courses offered at the Center for Gerontology and other courses available at Oregon State University, it is believed that a comprehensive graduate program could be developed to provide well-qualified retirement home administrators for Oregon and the Pacific Northwest.

Purpose of the Study

The purpose of this study, therefore, is to identify and enumerate the responsibilities and problems of administrators and the background preparation needed by them in the successful management of retirement homes, and to make recommendations that can be used as a basis for planning an interdisciplinary academic program designed to prepare individuals for such positions. Interest in this research was stimulated by discussions with the Field Instruction Supervisor of the Oregon Center for Gerontology who described so vividly the need for qualified people to fill positions as retirement home administrators and by a personal concern for the elderly.

CHAPTER II

REVIEW OF LITERATURE

The problem of an increasing number of older people in relation to the whole population is not strictly an American one. In several European countries the elderly represent an even higher proportion of the total population than in the United States. In Western Europe the percentage is over 10 percent on the average and this percentage is expected to continue rising through 1980 (United Nations, 1961, p. 342).

Europe has provided independent living arrangements for the aged for centuries. Glenn H. Beyer of Cornell, a noted housing specialist, has found that the first special housing for the elderly, and still in existence today, is Die Fuggerei in Augsburg, Germany, which was built in 1521. To be eligible family heads had to be at least 55 years old and there was an income limit for admission. Single people were not admitted but widows were able to have small apartments. Also in the seventeenth century Dutch merchants built Hofje for their retired workers and servants. These were generally two-story apartments built in the form of a hollow square with a garden in the middle (Beyer, 1965, p. 528-529).

Today Sweden is the leader in housing for the elderly. This country has been constantly reviewing and revising its policies for

housing the aging. Originally blocks of apartments were built for the elderly but this had the undesired effect of isolating them from the general population. When this was realized the "scattered flat" or apartment concept was developed. This gave the elderly person the right to any new state supported apartments. Since the state supports about 90 percent of all housing construction the elderly were scattered throughout the general population (Beyer and Nierstrasz, 1967, p. 128).

Norway and Denmark are both meeting the housing needs of their senior citizens in slightly different ways than Sweden has chosen. The government of Denmark provides apartments for the elderly in large complexes that also house young couples with children but the ground floor is reserved for the elderly. In Norway large 10 to 12 story apartment blocks for the older citizens are constructed. Many of the elderly prefer the upper floors in Norway because of the view and because there is less noise than on the lower floors. The most important principle of housing the aged in the Scandinavian countries is that the governments, both municipal and federal, take the responsibility of providing adequate housing for their citizens (Beyer, 1965, p. 530).

Great Britain has long had a tradition of housing and caring for the elderly. In the Middle Ages and Elizabethian times almshouses were built by the wealthy as charitable acts. Christopher Wren designed many of them in the seventeenth century. The Elizabethian

Poor Law of 1601 imposed a tax to maintain these almshouses (Gold, 1970, p. 265). However, in England today the trend is toward rental housing provided by local government. Peter Townsend's survey (1964, p. 23) of British residential institutions in 1960 revealed that there were 100,000 beds in 3,000 institutions. Thirty-three percent were publically supported by federal funds, another 33 percent by local government, 23 percent were run by non-profit organizations and 11 percent were commercial ventures. Communal housing for the elderly tends to be more geographically dispersed in England than in the United States (Aves, 1961, p. 175-176). Climate seems to attract retired people to certain sections of the United States more than others (Wakely, 1965, p. 5). The Bureau of the Census (1971, p. 25) estimates this trend will continue and during the next 20 years the older population will grow to over two million in New York and in California and will number more than one million in each of five other states, Florida, Illinois, Ohio, Pennsylvania and Texas.

Housing projects of all types in Western Europe are built by various sponsoring groups. As in the United States, some are sponsored by religious groups, labor unions and fraternal organizations among others. The largest number in Europe, however, are municipally sponsored. Frequently the federal government gives aid in housing the elderly, in the form of rent subsidies and other special allowances (Beyer, 1965, p. 420). All in all, Western Europe seems

to have more, and more diversified, programs to aid its elderly than does the United States.

The problems of the aging in the United States have been under consideration only in the past few decades. In this urban, increasingly mobile society, generations within families do not live together as they once did (Shanas, 1969, p. 139). American culture is fast changing from a rural to an urban society. People tend to leave home at an early age and establish homes of their own. Children are not as geographically tied to a region as their parents were but tend to move where the jobs are. Another factor in the problem of the aging is early retirement. As people live longer the number who retire from active work while still in good health also increases. Men and women who have been busy all their lives may suddenly find they have time on their hands.

The United States Federal Security Agency established a working committee on Aging in May 1948 and sponsored the first National Conference on Aging in August 1950. This conference emphasized the responsibilities of local communities to serve the needs of the aging. In July 1954 the Governors' Conference organized committees to study ways in which individual states could become involved. By 1958 two-thirds of the states had implemented suggestions for dealing with the problems of the aged by setting up their own state committees (Cottrell, 1960, p. 657).

A Special Staff on Aging in the Office of the Secretary of the United States Department of Health, Education and Welfare was created in 1959. It served as a focal point for the efforts of all branches of government, federal, state and municipal, on the problems of aging (Cottrell, 1960, p. 657). The first White House Conference on aging was held in Washington, D. C. in 1961. Probably more than any other one thing, this focused the attentions of the country's lawmakers on the plight of the aged. Out of this conference came the impetus for the Older Americans' Act of 1965. This act under the direction of the United States Department of Health, Education and Welfare, provided federal money to each state that developed acceptable plans for carrying out the objectives of the act. Oregon's plan, the Oregon State Program on Aging, was approved on March 1, 1967 (U. S. Social and Rehabilitation Service, 1970, p. 25).

Title V of the Older Americans' Act provided for grants to be awarded to any public or nonprofit private agency, organization or institution to train people in the field of gerontology. Under Title V of this act the Oregon Center for Gerontology was established in 1968 (Scott, 1970, p. 1). The Oregon Center for Gerontology has cooperative programs on three campuses in Oregon, the University of Oregon, Portland State University and the University of Oregon Dental School. Its aim is to provide multidisciplinary training programs in gerontology for graduate and undergraduate students. A degree is not offered.

Rather, students in many different disciplines are encouraged to take gerontological courses as a "minor" or supporting area. Thus a student is stimulated to bring the knowledge, skills and tools of his own discipline to bear on problems of aging (Scott, 1970).

The Retirement Home Administrator

One of the fields most in need of students in gerontology is that of administration of congregate living facilities for the aged. Abraham Kostick (1969, p. 333-334) defined the administrator as the

. . . person who enables the staff to function, supplements their common decisions and helps them to find their places in the overall structure of the home. He organizes the staff so that each profession utilizes its skills to a maximum.

Vivrett (1960, p. 616) points out that it is essential to develop management personnel who understand the objectives of social gerontology and who know how to apply them. Very little of the theory and experience gained in social gerontology has been applied to the management and operation of group housing because the number of academic programs to train managers of these facilities is quite small (Goldfarb, 1969, p. 310).

Dr. Woodrow Morris, director of the Institute for Gerontology at the University of Iowa, states that a good administrator must have a thorough and comprehensive concept of the nature of his profession. He is ultimately responsible for the welfare of human beings placed in his care. Administrators are called upon to "wear a variety of hats"

in their position. They must be one person for the residents, one for the public at large, one for fellow administrators and one for the personnel of the facility. Morale in the facility often depends directly on how the administrator is able to project these different personalities. He will do best if he has a clear philosophy of the nature of his task. He must achieve a deep understanding and a breadth of outlook toward the aging to be successful (Morris, 1966, p. 246).

Present day administrators of retirement homes are often "self-made" men and women, Morris says. Educational programs exist for school administrators and for hospital administrators and a few other types, but even in these fields many are holding administrative posts who have little or no special training. In many cases they seemed to be in the right place at the right time and to have learned through experience and trial and error. While special training may not be essential to succeed in some cases, it certainly is a stimulus to improvement of the profession (Morris, 1966, p. 245).

Dr. Herbert Shore (1971) stated that "balanced budgets are important but balanced lives are more important." Managers are a source of continuity for the elderly in retirement living facilities and as such must have a philosophy of service in addition to skills in management. Sheldon S. Tobin (1966, p. 10) of the University of Chicago believes that managers must treat each resident as a separate individual and realize that smooth institutional functioning is often at

odds with the desires of the residents. Administrators must be flexible in the management of the home and their orientation must be toward the needs of the elderly in their care (Mussen, 1963, p. 57).

A retirement home administrator, according to Marie McGuire (1971), must have certain personal characteristics in order to be a successful administrator. He must have a warm outgoing personality, be sincerely interested in people and have an understanding of and a friendship for older people. He must be sensitive to the dignity, character and wisdom of the elderly. Most important he must have patience. Administrators of retirement facilities are expected to be all things to all people (Rosow, 1961).

Need for Retirement Home Administrators

At the first White House Conference on Aging in 1961, a special section was devoted to the Role and Training of Professional Personnel in the Field of Aging. In the preface to one of the reports of the White House Conference on Aging (1961), the training and utilization of professional personnel for work in aging was recognized to be one of the most compelling needs facing our country. Immediate attention for preparing personnel for such new fields as social and environmental planning and administration, management of retirement housing, institutional administration, senior center direction, and recreation was stressed (p. 58).

The Special Subcommittee on Aging of the Senate Committee on Labor and Public Welfare was hearing testimony in 1967 on amending and extending the Older Americans' Act of 1965. Dr. Wilma Donahue testified before this committee and described the shortage of trained personnel in the field of aging as "of emergency proportions." She suggested "an immediate all out effort on the part of government and educational institutions. . . if the situation is to be improved" (U.S. Social and Rehabilitation Service, 1969, p. 2).

The Older Americans' Act was subsequently amended in 1967 with a Section 6 which authorized "a study and evaluation of the immediate and foreseeable need for trained personnel to carry out programs related to the objectives" of the Older Americans' Act of 1965, "and of the educational and training resources for persons preparing for work in such programs" (U.S. Social and Rehabilitation Service, 1970, p. 1-2).

This study was carried out by Surveys and Research Corporation, a private organization commissioned by the AOA. The study revealed a major shortage of trained and specialized personnel in programs serving older people. Management personnel in government housing projects designed for the elderly numbered about 4,900 in 1967. Few of these administrators had had any specialized training for working with older people. A projection by the National Association of Housing and Redevelopment Officials of the need for management and

social service personnel in retirement housing for the elderly by 1980 is stated as between 32,000 and 43,000. These figures are based on Census Bureau projections of trends in the size of the older population, estimates of living arrangements and family income distribution and probable number of elderly living in their own homes. Reasonable assumptions on the total volume of building under federal housing programs in the intervening 12 years and the proportion of these available to the elderly were also taken into consideration (U.S. Social and Rehabilitation Service, 1969, p. viii, ix, 23).

Educational and Training Programs

Jerome Kaplan (1970, p. 53), editor-in-chief of the *Gerontologist*, states that the study of gerontology in America has been greatly advanced by the development of formal education and training programs in universities and colleges. There are some 58 programs funded by the Administration on Aging (AOA) that focus primarily on training practitioners in gerontology.

The first priority has been given to career preparation programs, usually leading to a master's degree. Programs in public administration, recreation, community organization and retirement housing management with an emphasis on social gerontology have been developed. Clark Tibbitts (1970, p. 56) reported that the current number of graduates from these programs is only a fraction of those necessary

in the field. There must be more support for long-term career training and short-term training of those already employed in the field of aging.

Of the AOA funded programs, only three are aimed at producing administrators for congregate living facilities. The three universities currently conducting the programs are the University of Michigan, the University of Arizona and North Texas State University at Denton, Texas. The University of Michigan has the oldest program and was one of the first funded by AOA. As in most universities, gerontology is not a degree granting program at Michigan. Students are enrolled in one of ten schools or departments including: Community Practice in Aging; Welfare Administration and Policy Methods; Recreation and Aging; Housing the Elderly; Public Policy for the Aging; Community Organization for the Aging; Public Administration and the Aging; Guidance and Counseling of Adults; Occupational Therapy and Library Science (Tibbitts, 1970, p. 58).

The training programs at Michigan vary depending on the departments in which they are located but are generally four to five semesters long. Three credit courses in Psychology of Aging, Sociology of Aging and Income Maintenance in Retirement form the core in Gerontology. A proseminar in aging (without credit) is also conducted. Each school or department also offers a seminar in gerontology to integrate gerontological and professional content. Each student must

complete a one semester full-time field placement or internship before graduation (Tibbitts, 1970, p. 58).

Dr. Elinor Barnes (personal communication, 1971) states that the University of Arizona program has certain prerequisites for admission. A student must have at least a B-minus average in undergraduate work with a concentration in an allied field and a minimum of 15 hours in the social sciences. He should also have one course each in economics, accounting and statistics. Dr. Barnes emphasizes that Arizona is seeking mature people who have made satisfactory adjustments either in their undergraduate work and extracurricular activities or in their prior profession. The Arizona program, unlike Michigan's diversified one, is designed strictly to prepare administrators of retirement housing, personal care homes, retirement communities and related facilities. The objective is to train administrators in organizational, personnel and financial skills and to give them an insight into the physical, psychological and sociological problems and needs of the elderly. The program is based on four semesters plus one summer term. Subjects are economics, housing, management, psychology, public administration and sociology. Each student spends 26 weeks in a full-time residential administrative internship before the final semester of class work (Tibbitts, 1970, p. 57).

North Texas State University Center for Studies in Aging administers master's level programs for students who are interested

in applied or professional fields relating to aging. These fields include public administration, speech pathology, library science and administration of programs in aging with particular emphasis on the administration of retirement facilities. A minimum of 21 months is required to complete the master's program. All students have a core of Social Gerontology courses including seminars on Psychology of Aging, Sociology of Aging and Community Organization in relation to aging. Work on federal, state and local programs affecting the elderly with emphasis on health and housing are included for those in the retirement housing program. An eight-month practicum or internship is required for those in the public administration or retirement housing fields (Tibbitts, 1970, p. 59).

Dr. Hiram Friedsam (personal communication, 1971), director of the program at North Texas State University, derived his program in retirement housing administration to some degree from information he obtained by interviewing 30 successful administrators around the country. He thinks that participants in the field with actual experience can be valuable sources of information to educators involved in curriculum development in this area. One of the professors at North Texas State University, Dr. Cora Martin, has a grant from the U.S. Social and Rehabilitation Service to structure a suitability test for administrators. Unfortunately her results are not yet published.

Each one of the three programs to train administrators of

retirement homes is approximately two years long. Each has an internship or practical full-time field experience as a prerequisite for graduation, and each has a core of courses in gerontology, emphasizing the psychological, social and physical aspects of aging. Each program accepts specialists in professional or technical fields allied to aging and provides the additional preparation and training necessary to become successful administrators. Morton Leeds (1969, p. 406, 410) points out that when a specialist in any field other than administration is made the administrator of a retirement home, the home is apt to take on some of the characteristics peculiar to his field. The nurse or medical administrator frequently lends a hospital and "patient instead of resident" tone to the facility. The hotel administrator places emphasis on the dining room and general appearances and may forget the problems of aging that his residents encounter. The social worker, strong in the social problems of the aged, may be weak in the business operation of the home, as may the retired minister or priest. What is needed is a realization that this is a new field in which many skills can be blended to make a new mixture that will fill the needs of a retirement facility.

Clark Tibbitts (1970, p. 56) says that the second priority in training grant support of the AOA is short-term training. Nearly 24,000 home administrators are working in the field and will in all probability continue to manage for a long time to come. It is essential

that some provisions be made to improve their skills and update their knowledge as soon as possible. Although much short-term training is offered under the sponsorship of universities, other sponsoring groups have been hospitals, medical societies and professional organizations among others. Fifty-two federally supported programs sponsored by colleges and universities were held in 1967-1968 (U.S. Social and Rehabilitation Service, 1969, p. 72-84). They were held in most of the states of the union and length of training time varied from 7 hours to 20 weeks. These short courses were aimed at professional and para-professional, volunteers and students, and their purposes were equally diverse. Methods of training were tailored to the participants and their needs. Dressler (1970, p. 125-126) described his experiences in using a one-day sensitivity training method to increase students' interpersonal awareness and gain a better understanding of the emotional problems of the aged. The students and educators were so enthusiastic about the experience that the author suggested similar training might be valuable for the elderly themselves. Dressler stated that it might alleviate feelings of loneliness and isolation that often plague the aged. Although Dressler used this method of training, other short courses are conducted along orthodox lines. The ideal short courses should be fitted to the participants and their need, and the trainers and their abilities.

A summary review of the literature seems to indicate that there

is a definite need for retirement housing administrators in a society that has a continually expanding older population, and that more formal education and training programs on a long-term career or developmental short course basis must be encouraged.

CHAPTER III

PROCEDURE

The Public Health Service of the United States Department of Health, Education and Welfare (1963, p. 2) defined the different types of care offered in residential facilities for the aged. Two of these definitions, residential care and personal care, helped to set the boundaries of this study. They are defined as follows:

Residential care provides primarily room and board with limited services such as laundry. Personal courtesies such as occasional help with correspondence or shopping and a helping hand short of routine provision of "personal care."

Personal care provides, in addition to room and board, personal services such as help in walking and getting in and out of bed; assistance with bathing, dressing and feeding, preparation of a special diet and supervision over medication which can be self-administered.

Only those facilities that offer at least one meal and simple personal services were included in this study. This eliminated public housing which offers only shelter. Background information and knowledge about retirement facilities that fit into these two categories and the persons who administer them was gained by conferring with personnel at the Oregon Center for Gerontology. Information about programs available to train administrators was gathered from graduate catalogues and brochures from the university of Michigan, the University of Arizona and North Texas State University, schools now offering a graduate program in administration of retirement housing.

A period of observation at a retirement facility in Eugene, Oregon was arranged through the efforts of the Field Instruction Supervisor at the Oregon Center for Gerontology. Time was spent observing various areas of the retirement home facility such as the administrative office, health care center, dietary department, business office, housekeeping and the maintenance departments. Over half the observation time was spent with the administrator and/or his assistant learning their methods of management. The rest of the time was spent participating in activities in the various departments. Frequent consultations were held with interested residents to gain an insight into their thoughts on living in a retirement facility. The privileges of attending a committee meeting of the residents' council and eating in the dining room were also extended. Gradually a knowledge of the responsibilities faced by administrators of retirement homes and the thoughts of the residents on life in a retirement home became apparent.

On June 4, 1971 a Northwest Regional Workshop on Creative Housing Management for the Seventies, sponsored by the Oregon Center for Gerontology, Oregon State University School of Home Economics and the Oregon Division of Continuing Education, was held at Oregon State University. This provided an opportunity to meet and listen to authorities in the retirement management field and participate in small workshop groups. A panel of senior citizens, each of whom

has faced the problems of retirement living in a different way, was particularly enlightening. Mrs. Marie McGuire, Program Advisor for Problems of the Elderly and Handicapped for the Department of Housing and Urban Development, and Dr. Herbert Shore, Director of the Dallas Home for the Jewish Aged, both with many years of experience in the field of retirement home administration, were excellent speakers. Of great help also was the opportunity to meet and talk with administrators from many different retirement homes in the Northwest.

More information from different facilities was necessary to gain a better insight into the duties and responsibilities of the administrator. To provide this information it was decided to send a questionnaire to retirement home administrators in the federally designated Region X, which includes Washington, Oregon, Idaho and Alaska. Data from the questionnaire would be used as a basis for making recommendations for planning an interdisciplinary academic program designed to qualify individuals as administrators of retirement facilities.

Design of the Questionnaire

A questionnaire was developed to obtain information about the responsibilities, problems and background preparation of administrators of retirement homes. The questionnaire was designed to collect information about the size of the facility, services offered its residents

and the educational and professional background of the administrator. Other questions related to the satisfaction the retirement home administrator obtained from his position, the problems and frustrations involved and the responsibilities he had. Topics that might be included in an academic program designed to prepare administrators and the necessity for an internship or full-time work/training program were investigated. The position of an assistant administrator and his duties and the interest of the respondent in continuing his education through workshops or seminars on some aspect of retirement home administration were also included (complete questionnaire in Appendix A).

It was decided that the questionnaire should be sent to those administrators in congregate living facilities which offered residential and/or personal care to the elderly as defined by the United States Public Health Service. To further limit the study only those facilities in HEW Region X were included. A mailing list for the questionnaire was developed from the names and addresses of members of the Oregon Association of Retirement Home Administrators and from listings of retirement facilities obtained from the Administration on Aging and from the National Council of Retired Persons. Names of additional facilities which are federally funded were obtained through the Oregon Center for Gerontology. A total of 126 names comprised the mailing list.

The questionnaire was pilot tested. Appointments were made

with three administrators who were chosen because of the geographical position, size and differences of facilities offered to the residents. One retirement facility offered strictly residential care and had a capacity of under 100. One facility offered both residential and personal care and had a health care operation on the premises for the residents' needs. Its size was between 200 and 300 units. The third pilot test was conducted at a medium-sized (155 unit) retirement home which offered both personal and residential care and provided a health care center for its residents. Each administrator was asked to fill out the questionnaire and then any questions or comments that arose from the instrument were discussed. On the basis of these interviews, the questionnaire was used as originally designed.

A covering letter was designed to accompany the questionnaire which was addressed to the administrator. A self-addressed stamped envelope which was coded to identify the respondent in case of follow-up was enclosed. No identification of the respondents was asked for on the questionnaire. A deadline of June 9, 1971 was stated in the cover letter and all responses used were received by June 22, 1971. Persons not responding by June 15, 1971 were contacted by telephone.

Questionnaire responses were numerically tabulated and bar graphs made to better analyze the distribution of the data and see any pattern of correlation. When a pattern of correlation was noticed between two questions, 8 and 9, Pearson's product-moment

correlation coefficient was used to ascertain their linear relationship (Weiss, 1968, p. 210). There were ten such relationships found. Correlations of these were calculated. The definitional formula used was

$$r = \frac{\Sigma(x-\bar{x})(y-\bar{y})}{\Sigma(x-\bar{x})^2 \Sigma(y-\bar{y})^2}$$

for compute analysis of the data. (See Appendix B)

Finally, recommendations were made to serve as a basis in planning an interdisciplinary academic program designed to qualify individuals as administrators of retirement facilities. These recommendations were based on analysis and evaluation of the data obtained from the questionnaire, the pattern of curriculum in other programs for administrators and availability of applicable courses at Oregon State University.

CHAPTER IV

FINDINGS

The following data were obtained from 51 usable questionnaires returned, which represented 40.5 percent of the 126 total sent. Fifty-nine questionnaires were returned, but eight were unusable due to incomplete data, did not meet our definition of retirement facilities, or were returned too late. Of the total number sent, 54 were sent to facilities in the state of Washington with 20 or 37.3 percent returned and usable. Thirty-four questionnaires were distributed in Idaho with seven or 20.6 percent returned and usable, three were sent to facilities in Alaska and none were returned that could be used. Thirty-five questionnaires were sent to retirement homes in Oregon of which 22 or 62.9 percent were returned and usable. It is possible that there was better response in this state since the study was carried out under the auspices of the state universities. Another reason could be that the Oregon Association of Retirement Home Administrators was alerted to the study and need for the data discussed at one of their meetings. The members of this association seem to be interested in further professionalizing the retirement home administration field. A greater response might have been obtained from the administrators in other states if their state organizations had been contacted.

Number and Size of the Facilities

Responses received showed that 18 or 35.2 percent of all retirement homes studied were under 100 units in size. Sixteen or 31.3 percent had 100 to 199 units, 10 or 19.6 percent were between 200 and 300 units in size and 7 or 13.3 percent had over 300 living units. Seemingly the smaller facilities are more popular than larger homes in the Northwest since 66.5 percent were under 200 units in size. The larger retirement homes (from 200 to over 300 units) seemed to be clustered in the metropolitan areas of Portland, Seattle and Spokane. Medford in the southern part of Oregon also has a large facility.

Classification of Services Offered Residents

All the facilities studied offered meal service to their residents since this was one of the criteria of the definition used in setting up this study. Forty-one of the respondents or 80.4 percent reported that maid service was available and 48 or 94.1 percent had a recreational program for the residents. Since food service, maid service and recreational programs were available in all or the majority of facilities studied it would seem that the administrator should have special knowledge in these areas.

Data also showed 41 of the 51 retirement homes (80.4 percent) offered health care which might indicate the administrator could find himself involved with nursing and medical problems and possibly with

governmental regulations concerning Medicare. Certainly a familiarity with medical problems of the elderly and a knowledge of governmental legislation would help the administrator cope better with his position. Other services that the facility provided were written in by the respondents. Eight indicated that religious services were conducted in the facilities on a regular basis. Five retirement homes provided laundry service and four maintained a hobby or workshop area for the residents. Five respondents indicated that occupational therapy was provided for those residents who needed it. Two administrators mentioned that a transportation system for residents to get to shopping areas was provided and one said his facility was trying to set up some sort of shuttle service since transportation was a major problem for his residents. Transportation and how to provide it seemed a very real concern of some administrators and was repeatedly mentioned at the Northwest Regional workshop on housing management. Other services mentioned were maintenance, library on premises, management of personal business affairs of the residents, counseling, speech and hearing therapy, supervision of residents' medicines, study group activities, a beauty shop on premises and social therapy.

It would appear from these data that the administrator should be knowledgeable of many areas in order to manage his retirement home efficiently. Morton Leeds pointed this out by stating that retirement home administration is a brand new field but a field which is a blend of

other professions. It is the responsibility of the administrator to have the skills that will fit the needs of his facility.

Background of the Administrator

Responses from the questionnaires showed that length of time the administrator had been employed in a retirement home varied from 6 months to 11 years with a mean of 4.78 years. Thirty-six respondents, 70.6 percent, had been employed as retirement home administrators for six years or less, but five or 9.8 percent had been in the field as long as 11 years. The large number of respondents who have been in the field for six or less years may be explained by the fact that retirement home administration is a new and growing field where the number of openings is just now beginning to expand. One must remember that the first White House Conference on Aging was held in 1961, the Older Americans' Act was passed in 1965 and the Oregon Center for Gerontology was established three years ago in 1968. The federal government's first interest in the plight of the elderly was aroused in 1948, only 23 years ago.

Data also showed that administrators in retirement facilities tend to remain at the same facility. Administrators were asked to indicate how long they had been at the retirement home with which they were now associated. Thirty-seven or 72.5 percent had been in their present position six years or less and 14 or 27.4 percent had been

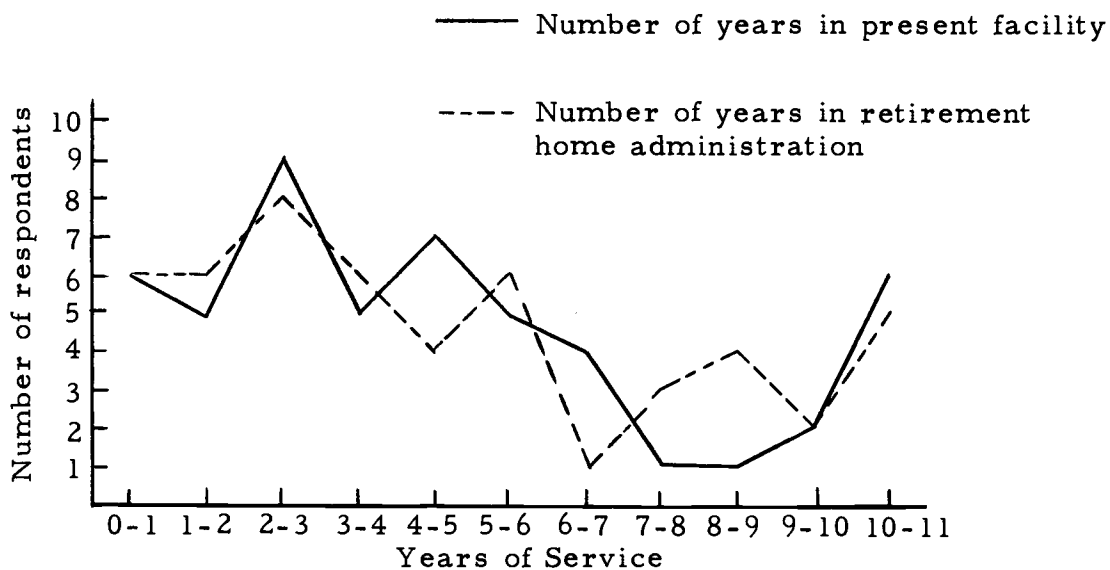


Figure 1. Relationship in years in retirement home administration and years at present facility.

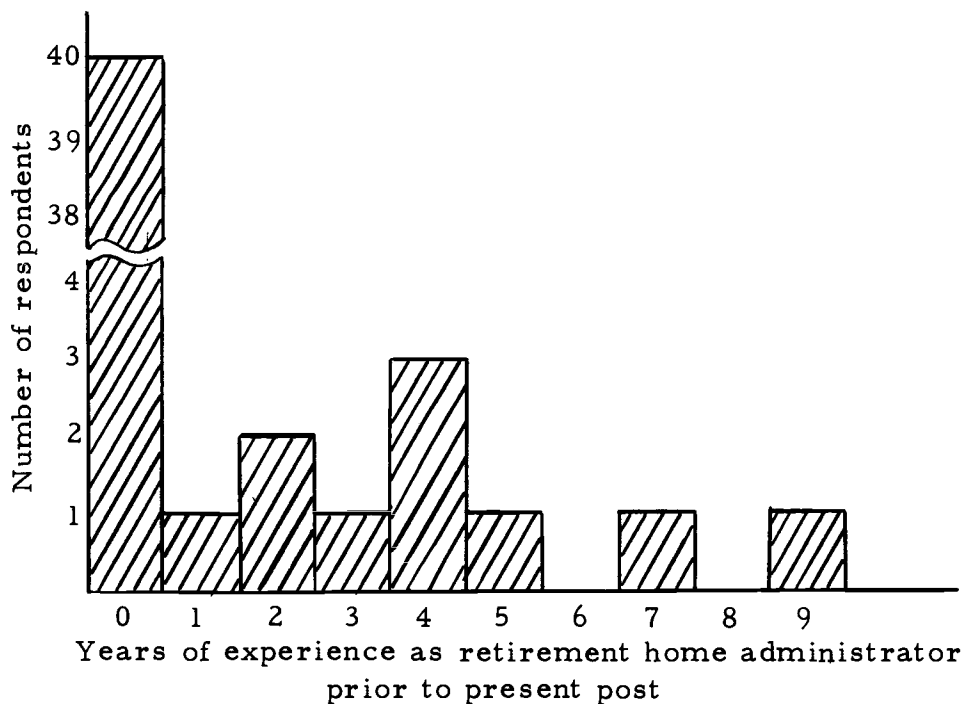


Figure 2. Mobility of retirement home administrators.

associated with the present facility for six to nine years. An interesting point appears when the length of time the respondent had been a retirement home administrator was compared with the time he had been at his present facility. Forty of the 51 respondents (78.4 percent) indicated that this was the only retirement facility with which they had been associated. It would appear that there is great job loyalty among retirement home administrators. Little information is known about the 21 percent that indicated that they had been associated with more than one facility. However, one gentleman indicated that he had served as an assistant administrator at another retirement home before assuming his present position. Many of the people indicated that they had many years experience in other careers before entering retirement home administration. One gentleman indicated that this was essentially a second career for him. This might be one explanation for the greater stability of position among these administrators. It seems, therefore, that the majority of these people are mature and more stable than the general population. Their mobility is not as great.

Respondents had a wide diversity of educational background. One person stated he had not completed high school while eight or 15.6 percent were high school graduates. Twelve or 23.5 percent had some college education and 15 (29.6 percent) indicated they were college graduates. Fourteen or 27.4 percent had had advanced training beyond a bachelor's degree, and one of these indicated he had a doctorate in Education. One person did not respond to the question.

Those who had attended college presented a wide variety of subject matter fields as their major. Eighteen different areas were named. Ten indicated business preparation which is almost a fourth of those who had some college background. The importance of business knowledge was stressed by the respondents in their comments throughout the questionnaire. Nine majored in some area of administration; two in hospital administration, four as school administrators, and one each in public administration, hotel administration and public health administration. Seven respondents indicated a background in sociology and another seven in religion. Both of these are areas where individual worth is emphasized and is important for those working with the elderly. Therefore, 80.5 percent can be said to have had either a business or an administrative background or special preparation to work with people (sociology or religious training). These three large areas dominated the educational preparation of the respondents.

Three respondents had a background in nursing, three in psychology and three in accounting. Two had majored in biology, two in pharmacy and two in education. The other fields mentioned once were speech, agriculture, philosophy and English. There are more than 41 responses (the number of people who attended college) because many people indicated multiple educational experiences. The majority felt that their educational preparation, even though not directly connected with retirement home administration, had been useful in their present

position. Many respondents mentioned that a knowledge of "working with and understanding people" had been strengthened through their educational preparation. Other things noted were business ability, knowledge of drugs, and a sense of strong motivation to help others. One respondent, who indicated he had majored in agriculture, did not feel his educational background had been helpful.

To a question concerning their previous major occupational background or field, 26 or 50.9 percent indicated a business background. Eleven or 21.5 percent had previously been in another type of administrative position with schools, hotels, Boy Scouts, United States government, Y. M. C. A. or nursing homes. Nine or 17.6 percent had ministerial experience prior to their present position and six or 11.7 percent had previously been engaged in social work. Two respondents indicated a military background. Four were former teachers, three were in hospital administration, three were nurses, two had school administration experience. One was a hotel manager, one had newspaper and promotional work background and one respondent indicated 25 years in police work. Again respondents many times mentioned more than one major background or field so the actual number does not equal the total number of the survey. It must be remembered that this question was asked of all respondents, not just those with university preparation. Therefore, it is not possible to correlate educational preparation and previous occupation.

The wide diversity of educational background and previous occupation demonstrated by the respondents certainly is similar to the data reported in a background paper for the White House Conference on Aging in 1961. At that time fewer than 10 percent of the professional and technical workers employed in programs serving the elderly had had any formal preparation for their position. Of the administrators then in the field many were ministers or priests, had a social work background, been in business, or were former hospital administrators.

The same areas of concentration again were evident in the responses about major occupational backgrounds. Business was indicated by 50.9 percent, 21.5 percent replied that they had had administrative experience and 29.3 percent were engaged in social work or the ministry. It must be explained that the percentages add up to more than 100 because a number of respondents indicated more than one previous major occupation.

When considering the major occupational backgrounds of the respondents it seems evident that they are social in nature, people-oriented and in which an ability to work with others is essential. Several respondents mentioned that retirement home administrators must be extroverts and have a genuine interest in people, particularly the elderly. This bears out Marie McGuire's statement to the effect that the administrator must have a warm, outgoing personality, be interested in people and have an understanding of the elderly.

Role of the Administrator

Administrators were asked to rate five things that might give them satisfaction in their position. The ranking was from (1) the greatest, to (5) the least satisfaction (see Table 1). A sense of fulfilling a real need was mentioned by 28 respondents as the greatest satisfaction they derived from their position. Working with people was listed as the greatest satisfaction by 15 administrators while two stated the residents' appreciation was most satisfying to them. Monetary reward was not ranked higher than 3 by any of the respondents.

Table 1. Satisfaction gained from position as ranked by administrators.

Satisfactions	Number of responses for each ranking				
	1 (greatest)	2	3	4	5 (least)
Working with people	15	15	10	4	2
Monetary reward	0	0	3	4	37
Residents' appreciation	2	10	16	15	1
Sense of filling a real need	28	12	6	1	0
Financially successful operation	1	10	8	18	6

Of the 46 people who answered the question concerning satisfaction gained from their position, 45 of them rated working with people, appreciation of residents, or sense of fulfilling a real need as their greatest satisfaction. The one other respondent felt operating a

financially successful facility was his greatest satisfaction. Four administrators said that they received a great deal of satisfaction (although not the greatest satisfaction) because they believed their work helped fulfill a spiritual need. Other comments help to point up the fact that these administrators have a great commitment of service to others which might have led them into retirement home administration.

Respondents were asked to rank problems of retirement home management from a given list of seven problem areas (see Table 2). Employee-related problems seemed to be a major concern for the respondents. Twenty-six or half of them mentioned obtaining and maintaining staff as their greatest or second greatest problem. Eleven administrators believed that human relations problems with the residents was of greatest concern, and another 11 mentioned getting desired production from staff was their biggest problem. Relations with the Board of Trustees and community acceptance of the retirement facility appeared to be least frustrating to the responding administrators. Additional problems were rated on the questionnaire by several respondents. Families of residents caused five administrators a great deal of frustration. The inadequacy of residents' finances in relation to retirement home costs were mentioned by three. Other problems important enough to have been added on the questionnaire were: high cost of professional services; legislative slowness or

rigidity; public misidentification of the retirement facility as a nursing home; forms to be completed; regulations and inspections; knowledge of various governmental agencies' demands in the present or the future; communication gaps; transportation problems for residents and inequitable governmental competition.

Table 2. Problems or frustrations of retirement home administrators.

	Number of respondents for each ranking						
	1 (greatest)	2	3	4	5	6	7 (least)
Obtaining and maintaining staff	10	13	11	6	4	3	2
Getting production from staff	3	8	10	5	6	4	3
Relationships with board	3	2	0	2	6	6	14
Poor acceptance by the community	2	1	3	4	5	6	11
Large scope of the job	10	8	9	5	5	4	1
Problems with the physical facility	4	5	9	11	4	4	1
Human relations problems with residents	8	3	8	5	9	4	2

The respondents were asked to consider a list of usual responsibilities of retirement home administrators and indicate those which took much of their time or not much time and those which could be easily delegated or not easily delegated (see Table 3). Evidently this question was not clear since 19 failed to answer in both categories. For this reason the total number of responses is inconsistent.

Table 3. Time spent and delegation of responsibilities of administrators.

	Number of responses			
	Much time	Not much time	Easily delegated	Not easily delegated
Staff recruitment /terminations	8	31	27	10
Dealing with employee problems	7	36	18	16
In-service training of staff	11	28	26	8
Conferring with board members	11	31	4	24
Meetings with residents	27	21	5	23
Meetings with prospective residents	28	16	12	19
Working with community health and welfare organizations	16	33	7	15
Meetings with or reports for governmental agencies	18	28	9	20
Long-range thinking or planning	30	16	1	20
Necessary but routine paper work	26	17	18	16
Inspection of physical plant	19	25	24	13
Fund raising and public relations	16	28	8	18
Professional meetings	23	25	5	22

Thirty administrators felt that long range thinking and planning took much of their time. Routine paper work, meeting with prospective residents and time spent with residents singly or in groups were other tasks that took a great deal of time. The task that the most respondents indicated as taking the least amount of time was that of dealing with employee problems. Four respondents stated that dealing

with the Board of Trustees could be delegated easily. One person indicated that the responsibility for long-range thinking and planning could be delegated. Thirty-one said they spent little time with the board; 24 replied that this responsibility could not easily be delegated. Interestingly enough, in light of the fact that employee-centered problems ranked highest as causes of frustration, the number of administrators who said they spent considerable time on employee relationships was quite small, under 10 percent. The majority believed their responsibility for dealing with employee problems could be easily delegated and spent little time on them.

When it appeared that there might be some correlation between the administrators' problems and frustrations and the relative amount of time administrators spent on their various responsibilities and also whether or not they could be delegated, the relationships were tested.

Those selected for analysis using Pearson's product-moment correlation coefficient were:

- (1) Obtaining and maintaining staff was correlated first with amount of time spent on staff recruitment and terminations, and
- (2) with whether or not this task could be easily delegated;

- (3) Getting desired production from staff was correlated with time spent dealing with employee problems and in-service training, and
- (4) with whether these tasks could be delegated or not;
- (5) relationship with the Board of Trustees was correlated with time spent conferring with the board, and
- (6) whether or not this task could be delegated;
- (7) human relations problems with the residents was correlated with time spent meeting with residents and prospective residents, and
- (8) whether this responsibility could be delegated or not;
(While this classification might be questioned, it was thought that in this case, meeting with prospective residents and making value judgments about them might very well have some bearing on human relations problems that could develop in the future.)
- (9) problems with the physical facility and time spent on inspection of and responsibility for the physical plant could be correlated, and
- (10) whether or not the administrator could delegate this task.

When the raw data concerning administrators' problems in obtaining and maintaining staff were compared with the raw data about time spent on staff recruitments and terminations it appeared that a

rather high negative correlation might show up. Many respondents had stated that little time was spent on staff recruitment and terminations yet they reported that obtaining and maintaining staff was one of their greatest problems. However, when the correlation was calculated a $+ .454$ was obtained. This means that a larger number of people than would be expected who considered staff recruitment and terminations important spent a large amount of time on it. The overall disparity came about because very few put much of their time on staff recruitment and terminations. The correlation does demonstrate, however, that those who indicated employee problems were important spent more time than the average respondent (which was very low).

Of the nine other correlations which were computed only two gave coefficients which could be considered even slightly significant. When the relationship between getting desired production from staff and time the administrator spent dealing with employee problems and in-service training was computed a correlation coefficient of $+ .170$ was obtained. While not very significant it does demonstrate that the administrators who considered this a problem did spend slightly more than the average amount of time in dealing with employee problems and in-service training. The correlation coefficient that was derived for the relationship between amount of frustration administrators expressed about human relations problems with the residents and whether or not they delegated meeting with residents and prospective residents was $+ .171$.

This shows that the number of respondents who indicated they had great frustration in this area did not delegate the task of meeting with the residents and prospective residents as much as did the administrators who did not think they had a problem in this area.

It could be mentioned that this group of administrators, taken as a whole, did not seem to spend much time on the areas of management that caused them (collectively) problems or frustrations.

Desirable Educational Preparation for Retirement Home Administrators

Administrators were asked to respond to a list of topics that might be included in an academic program to prepare administrators for homes of congregate living (see Table 3). They were asked to consider each as a possible topic for an academic program and decide whether or not the topic was Essential (must be included), Important (should be included but could be learned by experience), and Less Important to a program (included if time permits). Problems of the aging, including social, medical, physiological and psychological, ranked high on the list of essentials to be included. Forty-one of the 51 respondents believed that social problems faced by the elderly must be a part of an academic program. Thirty-seven replied that the psychological problems of the aging definitely were essential to such a program. Thirty-one thought the physiological and 30 the medical

Table 4. Possible topics for inclusion in an academic program for retirement home administrators.

	Number of responses		
	Essential	Important	Less important
Problems of the aging			
social	41	9	1
medical	30	16	2
physiological	31	13	4
psychological	37	10	0
Empathy toward the aging	35	9	2
Recreational and cultural programs	11	29	8
Personnel management	37	10	3
Legislation affecting the aging	17	24	9
Legal aspects of management	24	22	5
Food service operations	26	21	3
Nutrition for the elderly	18	24	7
Public relations and community organization	18	27	6
Types of functional housing for the aging	7	27	15
Business organization and management	40	10	0
Financial management	42	8	0
Interior decoration	3	17	30
Plant maintenance	12	25	14

problems of the aged must be included. It would seem these administrators agreed with Shore's feeling that balanced lives are or should be important to retirement home managers.

Fifty administrators thought that business organization and management and financial management were subjects that must or should be included in a retirement home administration program although a few mentioned that this knowledge could be gained by experience. As one man put it: "retirement homes are businesses with a heart and to offer the elderly the security they are entitled to, they must be run on sound business principles." Administrators should be aware of their problems in order to help find solutions. Thirty-seven said that personnel management must be included and 35 described empathy toward the aging as an essential. Two gentlemen questioned whether empathy could be taught but said that if it could, it should be an essential part of the program.

Forty-seven administrators thought that a study of food service operations should definitely be a part of the retirement home administrator's training. Each of the retirement facilities studied had a food service department and many thought that it caused them problems. Also it probably requires the largest share of the budget. At the facility where the investigator observed, the dietary or food service department had the highest budget and the greatest number of employees of any department in the retirement home. It would seem

plausible for the administrator to have some knowledge of food service management if only to be in a position to judge if this department is operating efficiently. The respondents, recognizing that one of the prime problem areas of the aging was their poor nutrition, stated that nutrition of the elderly should be part of the preparation. Two other topics that the respondents ranked as important to the preparation of administrators were legal aspects of management and legislation affecting the elderly. The legislation concerning the aged is vitally important to the operation of a retirement facility. Almost all the residents are qualified under the Social Security Act and have benefits under the Medicare legislation. Many of the health care facilities connected with the retirement home operate under Medicare. It is important for the administrator to have some knowledge of these laws and the interpretation of them in order that the residents may obtain their full benefits.

Public relations and community organization seemed important to many respondents. Eighteen rated these as essential topics and 27 mentioned that they should be included but might be learned through experience. Six administrators singled out public relations as especially important. The consensus of their statements seemed to be that without a good knowledge of and working relationship with the public, a facility did not have much of a chance to succeed.

Many respondents mentioned that a well-prepared administrator

would be familiar with recreational and cultural programs that appeal to the elderly. Without these programs the retirement home can often become a place where the residents stagnate, just waiting for the time to die. With some knowledge of recreation the administrator will be able to help the residents plan and carry out a program which will be of enjoyment to them.

The topics on the list of possible academic subjects considered least important were interior decoration, plant maintenance, and types of functional housing for the elderly. However, some administrators considered them of essential importance. It is possible that these respondents were or are now engaged in planning for construction of or an addition to a retirement home where knowledge of these three topics would be of great importance.

Two administrators of retirement homes indicated that a knowledge of the spiritual needs of the elderly was extremely important. It can be noted that one of these respondents identified himself as an administrator of a religiously sponsored home and the other had been interviewed as part of the pilot test and stated he was a minister.

It would appear that these respondents, speaking from experience, are seconding the emphasis of the programs of the three schools engaged in preparing retirement home administrators, the University of Michigan, University of Arizona, and North Texas State University. Dr. Elinor Barnes, director of this curriculum at the University of

Arizona, sums up their program as one to train administrators in organizational, personnel, and financial skills and to give them an insight into the physical, psychological and sociological problems and needs of the elderly. Again it seems a combination of business acumen, administrative skills and the ability to work with and understand people, particularly the elderly, are the areas where professional preparation should be concentrated.

When questioned about the advisability of an internship 43 or 87.7 percent replied that an internship should be part of an academic program to prepare administrators of retirement facilities. Six respondents (12.2 percent) did not think an internship necessary. One person indicated "yes for some and no for others" and one person did not answer the question. Of the 43 who replied that an internship was important, 12 or 27.7 percent stated one year as a desirable length of time. Four or 9.5 percent gave nine months as the best length of time, 19 or 44.1 percent thought six months might be long enough, and 8 or 18.6 percent thought a three-month work/training experience might be desirable.

The fact that 87.7 percent of the respondents indicated an internship should be a part of the academic preparation agrees with the curriculum plans of the three universities now engaged in preparing people for this field. Each of the schools provides for a full-time work/training experience before completion of the program. Michigan

requires one semester of full-time placement, Arizona has a 26-week long internship and North Texas State University has an eight-month practicum requirement for graduation. The majority of respondents indicated that six to nine months would be a desirable length of time for an internship.

Only 43 people answered a question about accepting interns in their facilities. Thirty-seven (86 percent) were willing to consider having interns and six or 14 percent would not accept student trainees in their facilities. Nineteen administrators mentioned that the financial burden of the internship could not be borne by the retirement home and some suggested state or federal aid to support the student while he participated in the work/study program. Two people qualified their possible acceptance of an intern by stating that a Board of Trustees would make the final decision on the matter. One respondent thought that compatibility of the intern and the administrator was an important consideration. One administrator insisted that age of an intern would be very important in his facility and he would be interested only in a "mature individual." One respondent, who identified himself as an administrator of a religiously sponsored home, stressed that an intern must "neither smoke nor drink and have high Christian ideals, motivated by service rather than monetary reward" to be acceptable at his facility. One gentleman mentioned that his retirement home was in the state of Washington so he was not too

interested in an Oregon program. These data seem to indicate that administrators are interested in educational programs to train managers for congregate living facilities and their willingness to participate in such programs.

Only 11 (22 percent) of the respondents had an assistant administrator but over 40 percent of the facilities with over 300 units had someone in this position. Thirty-nine did not have an assistant and one person did not answer the question. Twenty-seven of the respondents who were willing to accept interns did not have assistant administrators. Duties of the assistant administrator were listed by those respondents who had someone in this position. Five administrators mentioned that the business office was the assistant's responsibility, four replied maintenance duties, three were responsible for "house-keeping" chores and three "stood in" for the administrator during his absence. Two replies indicated that the assistant administrators were responsible for personnel problems, and two conferred with prospective residents. Other responsibilities routinely the duties of assistant administrators that were mentioned at least once were: fire and safety duties, estate management, resident and family counseling and aiding in planning future development.

Thirty-six administrators were interested in attending workshops or seminars on some aspect of retirement home administration. Eight respondents (18.1 percent) were not interested. Some of these

said time was so limited because of their professional duties that they just could not spend it on workshops. Topics for a workshop that would be of interest were listed by the respondents. Business organization and management was mentioned eight times, and public relations, recreational planning and governmental programs and legislation were each listed three times. Two administrators were interested in workshops on nutrition, food buying and menu planning. In-service training, handling of personnel, legal aspects of management, medical problems of the elderly, a "philosophy of care" and the sociological aspects of aging were each mentioned by two respondents as topics of interest to them for future workshops or seminars. Topics mentioned once were: interior decoration ("especially baths"), endowment building, accounting, motivation, financial and physical problems of senior citizens and "people."

Over 80 percent of the administrators who responded to this question showed an interest in participating. Several indicated they would be interested in almost any topic relating to retirement home administration. Business organization and management was the topic most frequently mentioned. It would appear that there is a great demand for workshops and seminars on retirement home administration and universities and other groups should try to fill this need. As Clark Tibbitts (1970) said: "It is essential that some provision for short-term training be made to improve the skills and update the knowledge of the 24, 000 administrators now in the field."

CHAPTER V

SUMMARY AND RECOMMENDATIONS

"We only count a man's years when he has nothing else left to count." Ralph Waldo Emerson

For too long this statement by Emerson could sum up the attitude of many Americans when they were questioned about the elderly. America is a country that glorifies youth in contrast to older civilizations where age itself was a virtue, as exemplified by the Jewish people and the Chinese, cultures which have a reverence for age.

Just recently the United States has been faced with a growing older population who are welding themselves into a force to be reckoned with. "Senior Power" is becoming almost as familiar a slogan as "Black Power." Politicians are increasingly made aware of senior citizens and their political might. In response the federal government has started funding programs dealing with the elderly.

Surveys have been made which show that housing in retirement is one of the main problem areas of the aged. One of the new approaches in this country to housing for the elderly (although dating back to the Middle Ages in Europe) is the retirement home, a facility which offers food, shelter and security to older individuals. Many retirement homes are sponsored by non-profit organizations although some are commercial ventures and many have governmental support.

These facilities require a strong administrative structure with a capable manager to succeed. The identification of responsibilities and types of problems associated with retirement home administration and the background preparation essential for success in this field is the object of this study.

As the literature was reviewed, a profile of an administrator began to emerge. This profile was further sharpened by visits to a seemingly successful retirement facility, discussions with the administrator and observation of his work. It would seem an administrator must have a philosophy of service in addition to skills of management. He must be flexible in his management of the retirement home. He should be sincerely interested in older people, have a warm outgoing personality and be sensitive to the dignity, character and wisdom of those in his care. Above all he must have patience. He must be all things to all people.

The literature indicated that people from all walks of life, and with a wide variety of educational and professional backgrounds enter the field of retirement home administration. This was so because until a few years ago there were no academic programs to prepare retirement home administrators. As the need for managers of congregate living facilities increased people with a wide variety of professional and occupational backgrounds filled these positions.

As the retirement home field expands, however, gerontologists

and others are realizing the advantages of an organized academic curriculum, designed to prepare people to enter this field. The federal government through the Administration on Aging is now granting support for career preparation programs in retirement home management. Three universities, the University of Michigan, University of Arizona and North Texas State University, have AOA supported programs in retirement home administration.

A Center for Gerontology was established at Eugene, Oregon in 1968 to educate people in the field of aging. This center has developed a multidisciplinary program to prepare graduate and undergraduate students to bring the knowledge, skills and tools of their disciplines to bear on the problems of the aged.

Oregon State University has additional specialized disciplines that could be used to expand the scope of the present basic gerontological program at the Oregon Center for Gerontology. The School of Home Economics offers curricula in nutrition, family life, housing and home management all of which are important aspects of the problems of the aging. An academic program in Institution Management already exists and which together with the basic core courses at the Center for Gerontology could be used to develop a curriculum in retirement home administration.

In order to obtain information which would contribute to the development of this program a survey of retirement home administrators

was conducted. A questionnaire was distributed to 126 retirement home administrators throughout the Northwest. Data were contributed by 51 respondents. The survey indicated that the majority of retirement homes in this area (over 65 percent) were under 200 units in size, with larger facilities clustered around the metropolitan areas. Most retirement homes offered a full range of services including recreation, health care and maid service, in addition to food service.

The respondents, as might be expected from examination of the literature, had a wide variety of educational and occupational backgrounds. Three major educational areas stand out, however. Over 80 percent of the respondents who attended college had background study in business management, special preparation to work with people (sociology and religious training) and in administration. The occupational backgrounds of these respondents were in the same general areas as were their educational preparation, that is, business managers, sociologists and ministers, and administrators of various types. Also evident from the data of the questionnaire was the fact that there was little mobility among retirement home administrators. Seventy-eight percent of the respondents reported that their present position in a retirement home was the only such facility with which they had been associated.

Respondents indicated that they received their greatest satisfaction from serving people. It was expressed as fulfilling a real need

by 60.8 percent and 32.6 percent said working with people was their greatest satisfaction. Employee-related problems ranked highest or second highest of those causing greatest frustration by over half the respondents. Another 11 of the 51 gave "human relations problems with the residents" as their greatest problem.

One of the major time-consuming responsibilities of 30 respondents was long-range thinking and planning. Meeting with residents and prospective residents and routine paper work took much time for many respondents. From examination of the data it seemed that the respondents did not spend much time on the areas of management that caused them problems or frustrations.

Data from the questionnaire about educational preparation desirable for people entering the retirement home field indicated that certain areas of competence are of vital importance to this preparation. Administrative skills, business acumen and the ability to work with and understand people are necessary tools for an administrator and professional preparations should be centered in these areas. The respondents also believed an internship or work/study program was necessary to the preparation of retirement home administrators. Over 87 percent indicated that some plan must be made for practical experience in addition to theoretical preparation. Great interest in continuing education on the part of retirement home administrators was indicated by their response to a question about workshops and

seminars. Eighty percent were interested in improving their skills and updating their knowledge in this manner.

Recommendations

On the basis of the analysis and evaluation of the data obtained in this study, the patterns of curricula in the three universities offering programs for administrators of retirement facilities, and the availability of applicable courses at Oregon State University, which might be typical of those available at other universities, the following recommendations are made to serve as a base in planning an interdisciplinary academic program:

1. This program be offered at either or both the graduate or undergraduate level

Many respondents indicated that this could be a second career which might interest mature individuals who already have had career preparation in another field. The length of a graduate program should be two years plus one summer in order to include an internship. An undergraduate program would probably need to include the internship between the third and fourth year. The University of Arizona and North Texas State University have only graduate level programs which are two academic years plus one summer in length. The University of Michigan has both an undergraduate and a graduate program. Since this should be an interdisciplinary field it seems that this program, if

developed at Oregon State University could be offered in either the School of Home Economics through the Institution Management department or in the School of Business and Technology through the Business Management department.

2. That courses from the three major areas reported by the respondents, Business Management, Administration, and Human Relations, be included in the curriculum

Upon examination of the programs of the three universities in this field it is noticed that courses related to the three major areas mentioned above are included. Public administration, administration of health and welfare agencies as it affects programs for the aged, legal aspects of management, administration of homes for the aged, personnel management and management and organizational behavior are all courses dealing with the subject of administration and all or some of these courses are offered at the three universities. Business management courses are listed as fiscal management, budgetary administration, theory of insurance, and advanced accounting. Human relations courses found in the programs of the schools are human development, guidance and counseling of adults and community organization. The University of Arizona further specifies prerequisites of at least 15 hours in the social sciences and at least one course in each of the following: accounting, economics and statistics.

While respondents did not mention specific courses by name they indicated that courses in business skills, working with and understanding people and in administration would be necessary to the preparation of a retirement home administrator. It would seem, then, that since both the respondents and the other programs show the necessity of including courses in these areas, that courses in these areas should be utilized in planning a curriculum in retirement home administration. The amount of courses in each area would depend on the undergraduate core requirements but should give some degree of depth in these areas to the student's program. At a graduate level the program should be planned with consideration of the student's individual background.

3. The 12 hours of gerontology core courses offered through the Oregon Center for Gerontology be a required part of the academic program

The 12 hours of gerontology core courses to be included are: Perspectives of Aging, Psychology of Aging, Economic, Cultural and Political Factors in Old-Age Security and Biological and Health-Related Aspects of Aging. Respondents expressed their belief that courses of this nature are of great importance and that problems of the aging, social, medical, psychological and physiological, should be an essential part of the academic preparation of a retirement home administrator. Courses designed to cover this same subject matter

are included in the programs of the three universities currently in the field.

4. Basic courses in Nutrition and Institution Management (food service) be included as a required part of the academic program

From the point of view of a home economist it would seem that these courses should form a vital part of the academic preparation of a retirement home administrator. Since food service in any facility has one of the largest budgets and number of employees of any department, the administrator should have some basic knowledge of food service operations in order to better control and utilize the staff and expenditures of this important area of his responsibility.

Proper nutrition among the elderly is apt to be one of their biggest problems and the retirement home has an obligation to see that the meals served are adequate in all respects. A basic course in nutrition would make the administrator aware of this situation and see that the food service manager is providing the proper food to fulfill the residents' needs. This is especially true since the smaller retirement homes do not employ a qualified dietitian and some of the contract food service companies may be more concerned with the profit than the nutritional aspects of the business.

5. Related courses with an emphasis on the needs of the

elderly be selected to round out the individual student's preparation

These courses that could be considered related, based on the responses, were in various areas such as recreation, community health, housing and architecture, family life and economics. The other academic programs provide time for the student to take related courses that will round out his preparation. Some courses already available at Oregon State University that might be found at other universities in these various areas are: Recreation Leadership, Principles and Philosophy of Recreation, Community Recreation, Principles and Practices of Guidance Services, Organization and Administration of Guidance Service, Community Health Services, Health Aspects of Gerontology, House Planning in Relation to Function. Most of these courses are at the graduate level and if the student is in the graduate program he may find it necessary to take some pre-requisites that have no graduate credit in order to complete his program. Related courses should be selected by the student and his advisor based on his previous experience and/or needs.

6. A carefully planned internship be a required part of the academic program

A planning committee, composed of academic personnel and representatives of the facilities offering internships, should be set up to establish objectives and specific experiences that would make

the internship meaningful. A concurrent seminar should be planned so the interns could meet during the internship for discussion.

Great care should be used in choosing the facilities that would be used for an internship. They would need to be large enough to offer a wide variety of experiences and the staff would have to be willing to spend time teaching the intern. Special requirements of the facilities would have to be taken into consideration in placing individual students. Some of the respondents defined carefully who they would consider acceptable. Religiously sponsored homes in particular would expect certain characteristics from a trainee.

The internship should be considered as a time in which the student begins to relate theory to practice; therefore, it should expose the student to all facets of management. The intern should rotate through each department, housekeeping, food service, maintenance, health care center, business office, and administration, in order to get full benefit from this experience. It would be desirable that the internship for graduate students be scheduled for the summer and fall terms between the first and second years so that the student would have two terms after the work/study program in which to build on this experience and to perfect his skills. Financial arrangements could not be expected to be borne by the facility offering the internship, but probably would have to be assumed by the student. Possibly state or federal funds might be available for this part of the program. In any

case the student should be made aware of his financial obligation at the beginning of the program.

7. Consideration be given to making workshops and seminars on retirement home administration available on various campuses and other central locations in the Northwest

One possibility might be to video-tape selected lectures from various courses with an emphasis on aging and use these as part of a short course. Topics of interest as stated by the respondents which might be developed for a workshop were business organization and management, public relations, governmental programs concerned with the aging, recreational planning, food service, personnel management and legal aspects of management.

It is hoped that these recommendations will prove useful to those who wish to develop and plan an academic program for retirement home administration. As a result of some of the information derived from this study an undergraduate program in Business with a split minor in Institution Management and Gerontology has already been developed at Oregon State University.

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APPENDICES

APPENDIX A
COVER LETTER AND QUESTIONNAIRE

May 26, 1971

Dear Sir:

The Oregon Center for Gerontology at Eugene, Oregon, and the Institution Management Department at Oregon State University, Corvallis, Oregon, are attempting to develop an academic program designed to qualify individuals as administrators of retirement facilities. As a first step in this program, we are interested in obtaining information about the duties, responsibilities and personal characteristics of retirement home administrators.

As a successful administrator you can be of great help in this undertaking. Are you willing to share information about your duties, your background, and your opinions on desirable educational preparation? If so, please complete and return the attached questionnaire. If a job description or specification for administrator of your facility is available, we will be pleased to receive a copy.

Enclosed is a stamped, addressed envelope for your reply. Please try to reply before June 9 so we may begin soon to collate all the information we will receive.

Sincerely,

Redacted for Privacy

Margaret Craig
Graduate Student

Virginia F. Harger, Head
Institution Management Department
Oregon State University

Survey of Retirement Home Administrators

General Information

1. Please check the number of living units in your facility.
 under 100 100 to 200 200 to 300
 over 300

2. Please check the number of services offered for the residents.
 meals maid service recreation
 health care service other (please specify)

Background of the Administrator

3. How long have you been employed as a retirement home administrator? _____ years
 a. How long at this retirement home? _____ years

4. Please indicate the number of years of school you have completed. Circle number.
 1 2 3 4 5 6 7 8 9 10 11 12 1 2 3 4 (Other; please specify) _____

5. If you attended college what was your major field of study?

 a. Is this preparation useful in your present position?
 yes no
 b. If "yes", why? _____

6. What was your previous major occupational background or field?
 Ministry Business Social work
 Another type of administration Other (please specify)

Role of the Administrator

7. What gives you satisfaction as a retirement home administrator? Please rank from (1) greatest to (6) least satisfaction.
- Working with people Monetary reward
 Residents' appreciation Sense of fulfilling a real need
 Financially successful operation Other (please specify)
-
8. What causes problems for you or frustrates you? Please rank from (1) greatest to (7) least problem.
- Obtaining and maintaining staff
 Getting desired production from staff
 Relationships with the board
 Poor acceptance of your facility by the community
 The large scope of the job and keeping up with all the details involved
 Problems with the physical facility
 Human relations problems with the residents
 Other (please specify) _____
9. From this list of usual responsibilities of retirement home administrators please indicate those which take much of your time or not very much time, and those which could be easily delegated or not so easily delegated.

	<u>Much of your time</u>	<u>Not much of your time</u>	<u>Easily delegated</u>	<u>Not easily delegated</u>
Staff recruitment and terminations	_____	_____	_____	_____
Dealing with employee problems	_____	_____	_____	_____
In-service training of staff	_____	_____	_____	_____
Conferring with the board and individual board members	_____	_____	_____	_____

	<u>Much of your time</u>	<u>Not much of your time</u>	<u>Easily delegated</u>	<u>Not easily delegated</u>
Meetings with residents, in groups or individu- ally, and/or families	_____	_____	_____	_____
Meetings with prospec- tive residents	_____	_____	_____	_____
Working with community health and welfare organizations	_____	_____	_____	_____
Meetings with or reports for govern- mental agencies	_____	_____	_____	_____
Long-range thinking or planning	_____	_____	_____	_____
Necessary, but routine paper work, corres- pondence, payrolls, etc.	_____	_____	_____	_____
Inspection of and respon- sibility for physical plant	_____	_____	_____	_____
Fund raising and public relations	_____	_____	_____	_____
Participation in professional meetings relating to aging and retirement home administration	_____	_____	_____	_____
Any others (please specify)	_____	_____	_____	_____

Desirable Educational Preparation for
Retirement Home Administrators

10. From the following list of topics that might be included in an academic program designed to prepare administrators of homes for congregate living, which do you believe are essential (must be included), important (should be included but could be gained from experience) and less important (included if time permits).

	Essential	Important	Less Important
Problems of the aging:			
1) social	_____	_____	_____
2) medical	_____	_____	_____
3) physiological	_____	_____	_____
4) psychological	_____	_____	_____
Empathy toward the aging	_____	_____	_____
Recreational and cultural programs for the aging	_____	_____	_____
Personnel management	_____	_____	_____
Legislation affecting the aging	_____	_____	_____
Legal aspects of management (risk insurance, etc.)	_____	_____	_____
Food service operations	_____	_____	_____
Nutrition for the elderly	_____	_____	_____
Public relations and community organization	_____	_____	_____
Types of functional housing for the aging	_____	_____	_____
Business organization and management	_____	_____	_____
Financial management	_____	_____	_____
Interior decoration	_____	_____	_____
Plant maintenance	_____	_____	_____
Others (please list)			
_____	_____	_____	_____
_____	_____	_____	_____

11. Should an internship be a part of an academic program of this type? (An internship may be defined as a full-time work/training in an operating retirement home or similar facility.)

_____ yes _____ no

a. If "yes," check the desirable length of time.

_____ 1 year _____ 9 months _____ 6 months

_____ Other (specify) _____

12. Would you consider accepting an intern to work with you if such an academic program were developed in Oregon?

_____ yes _____ no

a. Under these conditions (specify) _____

13. Do you have an assistant administrator? _____ yes _____ no

a. If "yes," what are his duties? (Please specify) _____

14. Would you be interested in attending a workshop or seminar on some aspect of retirement home administration?

_____ yes _____ no

a. If "yes," what topics would be of greatest interest to you?

If there is a job description or specifications for the position of administrator of your facility, please enclose it with your completed questionnaire. Thank you for your time and cooperation.

APPENDIX B

PREPARATION OF DATA FOR COMPUTER ANALYSIS
USING PEARSON'S PRODUCT-MOMENT METHOD

Certain steps to prepare the data were taken:

1. Letters were assigned to each possible response in Question 8 so that:
 - 8A represents "obtaining and maintaining staff"
 - 8B represents "getting desired production from staff"
 - 8C represents "relationship with the board"
 - 8D represents "problems with the physical facility"
 - 8E represents "human relations problems with the residents" (poor acceptance of the facility by the community and the large scope of the job were not assigned letters since they were not correlated with any responsibilities in Question 9)
2. Starting with response 8A (obtaining and maintaining staff) each individual questionnaire was examined to find out how the respondent had ranked it on a scale of 1-8 (greatest problem to least problem). This response or ranking was then weighted according to the rank the administrator had assigned to the problem. If it was his greatest problem (given number 1) then this response was assigned the score of 10 points. This weighting was done to overcome the fact that people find it easy to rank the first, second and possibly the least frustration but often assign numbers in between without much thought. Another reason is that this method gives a larger spread between numbers and makes results easier to see. The scale used was:

Response	Weighted score
1 (greatest problem)	10
2	7
3	4
4	2
5	1
6, 7, 8	0

Since only five correlations were computed responses of 6th, 7th or 8th rank were recorded together. Also, many respondents rated only five problems, very few gave 6th, 7th, or 8th. These weighted scores to Question 8A from each individual questionnaire were labeled "x" since in the formula $x =$ the weighted responses to each part of question 8.

3. Letters were assigned to responsibilities in Question 9 as was done in Question 8 so that:

9A represents "staff recruitment and termination"

9B represents "dealing with employee problems"

9C represents "in-service training of staff"

9D represents "conferring with the board"

9E represents "meetings with the residents and families"

9F represents "meeting with prospective residents"

9G represents "inspection of and responsibility for physical plant"

(Other responsibilities listed were not assigned letters since they were not correlated with responses from Question 8.)

A decision was made to combine for purposes of correlation the responses to 9B and C and 9E and F.

4. Since Question 9 gave two distinct pieces of information,

time spent on a responsibility (much or not much) and whether or not the task could be easily delegated, the subscript 1 was assigned to responses about time and the subscript 2 was assigned to responses about delegation. For example: $9A_1$ corresponded to the answer given to time spent on staff recruitments and terminations and $9A_2$ corresponded to whether or not this task could be easily delegated.

5. Since there were two possible responses to Question $9A_1$ (much time was spent or not much time was spent) a +1 was assigned if the respondent spent much time and a -1 was assigned if the respondent indicated not much time was spent. In the same manner the coding +1 was assigned to "not easily delegated" and -1 was assigned to "easily delegated" when tabulating coded responses to $9A_2$ (tasks that could not be easily delegated or could be easily delegated). Coded responses (+1 or -1) were recorded for each individual response to question $9A_1$ and labeled "y." In the formula $y =$ either time spent on a task or whether or not task could be easily delegated.
6. The sum and mean of "x" were calculated, the mean becoming " \bar{x} "; the same was done for "y" and " \bar{y} ." The program for the computer was written by a programmer from the computer center. Data were typed into the computer for analysis. The computer gave the ratio between the sum of the deviation products and the maximum value that the sum of the deviation products could be expected to take. The correlation figure is on a scale of +1 to -1 with 0 showing no relationship between the two quantities.