Aging in America: New Issues, New Opportunities

by Lloyd N. Morrisett, President
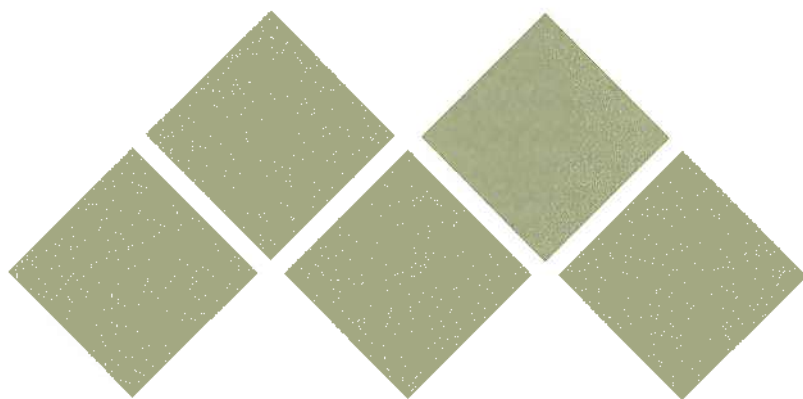
The Markle Foundation

The John and Mary R. Markle Foundation
was established in 1927 "to promote the
advancement and diffusion of knowledge
... and the general good of mankind."
Within this broad charter, the Foundation
has concentrated most of its activities
in one program area at a time. This has
ensured the efficient use of its resources
and has strengthened the ability of
the Foundation to have a real and
measurable effect.

The first major program of the Markle
Foundation was devoted to social welfare.
The second, begun in 1936, was in the field
of medicine, providing small grants-in-aid
for medical research projects. In 1947, the
Foundation created its Scholars-in-Medicine
program in response to a need for more teach-
ers, researchers, and administrators in the
nation's medical schools. This program award-
ed grants to gifted young people preparing
for careers in academic medicine.

The Foundation began seeking new
approaches to "the advancement and
diffusion of knowledge" when it decided in
1969 to focus on mass communications in a
democratic society. As communications have
changed dramatically in recent years, pro-
gram interests have expanded to include the
social benefits of information technology.

Program Report

The Markle Foundation aims to examine and improve the mass media and to explore the potential of information technology to enhance people's lives. To achieve these goals, the Foundation initiates and supports research, analysis, advocacy, programming, and other efforts directed toward serving the public interest.

The capacities of technology have expanded enormously in recent years. With the invention of the microchip and the convergence of such technologies as cable, microwaves, satellites, fiber optics and telephony, communications have advanced to a degree unimaginable just decades ago. As new services become widely available, they will change the way we live and work and influence our values, beliefs, and institutions. We need to understand these effects in order to develop our electronic resources for the benefit of society.

The Foundation focuses on the following program areas: the uses of the media to inform and encourage political participation; the emerging role of information technologies in the lives of older people; advances in electronic publishing; the design and improvement of software for educational and recreational purposes; and the development of communications policy that serves the public interest.

Proposals

The Foundation requires no specific form for submitting a proposal. It recommends, however, an initial inquiry by mail to permit an early judgment about the possibility of support. This letter should include a brief outline of the project indicating its purpose, procedures, chief personnel, and the amount requested. The Board of Directors approves grants at its meetings in November, March, and June.

Appropriations

During the fiscal year July 1, 1987 through June 30, 1988, The Markle Foundation made forty-two grants totaling $2,052,698.

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President's Essay

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During the long hot summers of the late 1930's, my mother, father and I used to drive from New York to Oklahoma for our annual visit with relatives. My grandparents and many other relations lived in and around two small towns not far from Oklahoma City. Depending upon the time of our arrival and the heat of the day, we might find my grandfather sitting in the swing or rocking chair on his front porch, perhaps with a cousin or friend. To me, a young boy, my grandfather seemed extremely old, yet having been born in 1864, he was then only in his early seventies. It also seemed to me that my grandfather spent a great deal of time on the front porch either talking with friends and relatives or simply rocking. One day I asked him, "Grandpa, what are you doing?" His answer was, "Passing time, just passing time."

Not only did my grandfather seem extremely old to me, but his answer to my question was completely perplexing. What did "passing time" mean? For a small boy there were innumerable things to do—walks to take, new places to explore, jungle gyms to climb, and books to read. Whether it was the puzzle his words created or a momentary understanding that my grandfather's world was not the same as mine, a vivid impression of those few moments on a hot summer day on a front porch in a small town in Oklahoma have remained with me ever since.

My own ideas about growing older have been influenced by those early experiences in Oklahoma as well as by my present responsibilities in caring for aging parents and relatives. In this I am probably like many other people whose views of aging combine early perceptions, personal experience, and acquired knowledge. Most studies of the elderly from which we draw our information look only at the very old or the infirm, and they capture a brief historical moment. They are snapshots in time. What we often ignore is that the conditions of age are changing. As younger people become older, they will be like their predecessors in some ways; but thanks to improved longevity, better health, and a degree of economic security, they are also charting new directions. By the year 2000, one-fourth of the American population will be over sixty-five. Although the consequences have yet to be fully realized, this maturing has already affected family relationships, government policy, employment patterns, and social organization.

Aging In America: Current Trends and Future Directions

In 1987, the Markle Foundation sponsored a survey to learn how older people live and spend their time, and to determine their attitudes and general outlook on life. Called "Aging in America: Current Trends and Future Directions," the study was conducted by the Daniel Yankelovich Group, experts in monitoring trends and public opinion. The researchers aimed particularly to discover how the new technologies affect the lives of older adults, people more than fifty-five years old, and what innovations they would find useful and easy to accept. The Yankelovich Group also compared the data they collected with responses from forty-five to fifty-four year-olds to predict the needs and aspirations of the next cohort of elderly.

One of the principal findings of the study is that a major concern of older Americans is avoiding unstructured time. People now, just as in my grandfather's day, need to find ways to fill their time, and being active and busy is often seen as the best way to avoid loneliness and boredom. As one person in the study said, "We've got it down to a science. You have to plan out each day, each year; otherwise there are bad moments. It (retirement)

doesn't work by itself." Although one very human desire, filling time and avoiding boredom, seems to have remained a primary concern associated with aging across the years, much else has changed.

Compared with many people of my grandfather's generation, older people today are more secure financially, healthier, and able to lead active, busy lives. Social Security now provides financial underpinning for most Americans over sixty-five. In my grandfather's time, many people were dependent upon personal savings, help from the family, what work was possible in the midst of the Depression, food grown in the home garden, and any meager pension that might be a part of previous employment. Many older Americans are, of course, concerned about their financial circumstances, but seven in ten of all older Americans own their own homes, and over half are living mortgage-free. Four in ten Americans between the ages of sixty and sixty-nine, mostly retired, have household incomes over $25,000. While the picture is not as rosy for those over eighty, it is still true that six out of ten of all Americans over the age of seventy rate their financial status as at least "good."

Health shows a similar pattern. Six out of ten people over seventy who were interviewed rate their health as "good," "very good," or "excellent." This is consistent with U.S. Department of Health and Human Services statistics, analyzed by the American Association of Retired Persons (AARP), which indicate that only 14 percent of men and women sixty-five to seventy-four need functional assistance. People sufficiently frail to require nursing home care—mainly persons over eighty years of age—represent only 5 percent of the elderly population. Older people do, of course, have age-related health problems. The majority, in fact, have such

chronic ailments as arthritis, hypertension, heart conditions, orthopedic impairment, and vision or hearing loss. Many have multiple conditions; but troublesome as these problems are, they are not debilitating. The prevalent attitude of elders today is one of "mind over matter," a deliberate effort to play down physical complaints.

Along with improved financial and physical health, communications technology has had an important role in allowing older Americans to remain connected with the world, in touch with friends and relatives, involved in current affairs, and entertained. In stark contrast to the picture that emerges from the Yankelovich survey, my grandfather's world was constrained both by the absence of useful technology and by his own values. There was a telephone in my grandfather's house, but it was little used for visiting, especially not long-distance. There may have been a radio, but it was seldom turned on. Even though the 1930's and 1940's were the "Golden Age of Radio," my grandfather paid almost no attention to it. I think there was a motion picture theater in town; but movies along with dancing, playing cards, and other simple entertainments were of little value, or perhaps even evil, in the strict canon of a Southern Baptist.

Now, almost all American households have television sets, and over half of the households of people seventy and above have more than one set. Many of these viewers also receive cable. Just 15 percent of the seventy and above group have VCR's, but more than 50 percent have equipment for playing audio tapes or compact discs. Radios are not quite as common as television sets, but there are several radios in many homes. More than half of the households of people ages forty-five to sixty-nine have VCR's, and a surprising 14 percent possess personal computers. Telephone

answering machines have become common-place, and as we all know from our own experience, the telephone makes it possible to sustain ever more widely scattered personal and professional relationships.

Compared to fifty years ago, older Americans have much greater financial security, are healthier and more active and are more easily able to stay in touch with their friends, relatives, and society. This is not to say that all older Americans are financially secure, healthy, and active. We know that many people still live in poverty, especially elderly women living alone. Many older Americans do not receive the medical care they need and do not have the means to pay for it. Many older Americans live in relative isolation with few friends and little contact with the world around them. There is much that remains to be done; yet compared with fifty years ago, it can be said that growing old in America is a surprising success.

The Revolution of Rising Expectations

The picture that emerges from the "Aging in America" survey is one of people growing older quite successfully. However, as problems of physical and economic well-being recede, new concerns are apparent. Two issues are suggested by the Yankelovich data that may become increasingly important to our older citizens. The first is a desire to remain a contributing member of society even as one grows old, and the second is a belief that work is desirable both to make a contribution and as an ideal means of filling unstructured time. Consider some of the responses of those in the Yankelovich survey:

• 61 percent of respondents agree that making sacrifices is the only way to become a strong person. This holds true throughout the entire age range from forty-five to those over eighty. Of twenty-eight issues there are only two statements with which there is more general agreement.

• Over 50 percent of those surveyed agree that the experience and wisdom of older people is the best hope for solving the country's problems.

• Almost the same number, 49 percent, agree that the country will be competitive when we reward those who work and perform.

• Relatively few, one-third, agree with the statement that it is foolish to put your own needs second to others, except under special circumstances.

• A similar minority, a third of those surveyed, agree that leisure time should be for relaxation and fun, not getting things done. Again, this held true for the oldest Americans surveyed as well as those between forty-five and fifty-nine.

Taken together, the responses to these questions strongly suggest that the majority of older Americans want to remain contributing members of society. They believe their wisdom and experience is important. They are willing to make sacrifices. Under appropriate circumstances, they will put their own needs second to those of others. Emphatically, they do not believe that the leisure time that they have achieved is simply for relaxation and fun.

These results are only surprising in the context of our national concentration on improving the financial security of older Americans and insuring proper medical care. These are rightly first priorities, but they have perhaps blinded us to what we know about human nature. Health and wealth alone seldom bring satisfaction and a great sense of fulfillment. Throughout the ages, great students of human nature from Socrates to Jesus, Buddha, and Kierkegaard have all known that being able to contribute to something beyond oneself is a vital aspect of a meaningful and fulfilled life. Even if society recognizes that

continued social contribution is an emerging issue for many older Americans, it is not at all clear how we will organize ourselves to meet this challenge. Economics, changed attitudes, new values, and developing technology will all probably have a part to play.

Perhaps the most startling information in the Yankelovich survey is that part of it dealing with work. It is here that attitudes and reality conflict. Well over half of all those surveyed—56.8 percent—agree with the statement that people don't want to stop working completely when they reach retirement. Agreement is as strong among those of eighty years of age and above as it is for those forty-five to fifty-nine. There is similar majority agreement, over 50 percent, with the statement that people who continue to work are happier than people of the same age who retire. Agreement with this statement is even stronger among those over eighty than those between forty-five and fifty-nine. These responses tell us that most older Americans in this survey would like to continue to work even though they have retired from the jobs of their youth and middle age. These attitudes are in stark contrast to the life circumstances of most older people. Of those between the ages of sixty and sixty-nine, only 27.5 percent are engaged in part- or full-time work. For those seventy and older, the percentage drops to less than ten. As their numbers grow, competent older adults can be expected to place pressure on society's institutions—schools, churches, business, and government—to find ways within flexible time arrangements to utilize their ability and experience.

Computer Technology and Older Users: SENIORNET

For some older people the problem of isolation can become increasingly acute. When workers retire, they lose both the daily struc-

ture of regular working hours and the community provided by the workplace. As they reach their seventies, individuals must also confront the illness and death of friends and family. Women, in particular, are likely to suffer from the loss of a spouse. Physical impairments coupled with fears may severely restrict mobility, leaving older persons homebound. As neighborhoods change and children move away, senior citizens often feel isolated in once familiar places.

A variety of responses, including regular contact with family and neighbors, visits to senior citizen centers and other programs, and assistance from homecare workers, can reduce isolation. Technology, too, can play an important role. The Lifeline System enables a user to push a button during a medical emergency to contact a caregiver immediately, thus alleviating the fear that a crisis could go undiscovered. With telephone reassurance systems, the homebound elderly receive daily calls that provide an emergency "check-in" and a vital social linkage with other individuals and resources. Social welfare agencies rely on telephone contact systems as a low-cost means of reaching isolated senior citizens and encouraging them to use available services.

Today, computers are used to send "electronic mail" and to hold "computer conferences." These enable users who are physically distant and who may never meet, either in person or by phone, to communicate, exchanging information and ideas. Computer "bulletin boards" invite users who share specific interests to join open forums of communication. With a host of new interactive services, including videotex, telebanking, and teleshopping, individuals can obtain information or conduct transactions without even using the telephone. With telecommuting, workers can contribute to the office without

leaving their homes. Of course, like younger Americans, individuals aged sixty-five and more can use computers for any of these functions, but the needs of older users have not been the subject of much attention. Society has yet to exploit fully the communications capabilities of the computer to meet the needs of the elderly.

Underwritten by the Markle Foundation, SeniorNet was launched in 1986 as a research project designed to discover whether older adults have the interest and ability to learn how to use computers. The project team, directed by Mary Furlong—education professor at the University of San Francisco—set up six sites around the country at which older people could meet, socialize and learn all about computers. In little more than a year, about 2,000 seniors—aged sixty to ninety-five —attended computer classes. The sites, equipped with computers, modems, and telephone lines, soon formed a network of enthusiastic users. That network now reaches sixteen sites—from New York to Hawaii, and from Texas to North Dakota. In addition, more than 200 individual users gain access to SeniorNet from their homes. Sites are usually set up in senior centers, but they are flourishing also in places like eye clinics, hospitals, and nursing homes. Although newer sites have local sponsors, the SeniorNet organization offers guidance and supplies the curriculum and training materials.

One of the most significant accomplishments of SeniorNet, and one with wide-ranging implications for the future, is creating a sense of community among the participants. SeniorNet provides a way for older adults to make contact with others and to feel a sense of belonging. Eighty-four year old Mabel Osborne, sick in bed for two years and resigned to spending the rest of her life there, read about a SeniorNet site in Dallas, Texas.

She got out of bed, bought new clothes, and went to class. She claims the classes saved her life. "I wasn't sick," she said, "I was bored to death."

Experience has shown that mastering the use of computers can increase seniors' self-esteem and encourage them to take a more active role in an increasingly technological society. Beyond communication, the network provides members with a means to gain access to information on subjects such as health, retirement, and genealogy.

The network also represents a potentially powerful tool to enable seniors to organize and act on issues of interest to them. Last year, for example, the Federal Communications Commission planned to impose an "access charge" on electronic networks that would have increased substantially the cost of particpating in SeniorNet. The threat aroused sufficient concern among members for them to hold a special teleconference in the summer of 1987, at which they decided to conduct a letter-writing campaign directed to the Commissioners. The resulting flood of letters helped to kill the proposal.

Self-confidence replaces helplessness as older people master computer technology. Florence Wetzig, retired beautician and current Dallas, Texas site coordinator, stated it well when she said, "There are no issues that senior citizens cannot tackle. If older people learn the skills and networking capabilities of computers in SeniorNet, the technology can empower them. We don't have to live by another generation's rules; we can make our own."

Computer Technology and Older Users: Another Perspective

Although the development of SeniorNet suggests some of the possibilities of computer-based conferencing systems for older

Americans, there has been little systematic study of the effects of such systems on groups or individuals. In 1987, with Markle Foundation support, the RAND Corporation began a research project to help remedy this lack of information. Volunteers were recruited from a major Los Angeles employer, the city's Department of Water & Power, to take part in a year-long field experiment. The letter of solicitation told prospective participants, in part:

The unusual and, we hope, exciting aspect of the study is that we are looking to you as someone directly involved to provide the issues and explore their implications...

We are forming two retirement task forces and the charge to each is straightforward. Members, half-retired and half-actively employed, will work together over the course of a year. Their task will be to consider, deliberate, probe and develop a set of recommendations about pre-retirement planning... to realize this goal, the task force participants may meet, form subgroups, correspond, work hard, play a little, or whatever you decide will best accomplish our joint purpose.

Additionally, members of one of the two task forces will have the option of communicating with each other and conducting their business with the aid of computers. Each member of this electronic group will have access to a micro-computer. Because we are interested in the possible advantages and disadvantages of all ELECTRONIC COMMUNICATION compared with more STANDARD MEDIA, we will randomly appoint task force volunteers to either group. We want you to consider participating whether or not you have used a computer before.

The project enrolled seventy-nine members, forty retirees and thirty-nine employees who were eligible to retire, distributed evenly

between standard and electronic task groups. Both task groups completed their work successfully and produced sets of recommendations for pre-retirement planning. In both cases, members of the groups found the tasks engrossing and valuable to their own thinking, but at least two major differences emerged between the two groups.

Initially, both the conventional task force and the electronic task force organized themselves similarly to carry out their work. The basic task was divided into smaller tasks for work by subgroups, and both task forces created six subgroups related to specific concerns such as health or finances. In the conventional task force, considerable time was spent in balancing these committees between pre- and post-retirees and creating groups of similar size. No one in the conventional task force was a member of more than one committee. In contrast, in the electronic task force, it seems to have been assumed that members could work on as many committees as interested them. Most members of the electronic task force started off with two or more committee assignments.

A second organizational difference emerged during the course of the work. In the conventional task force the committees remained fixed, while the electronic task force subdivided further as needed to facilitate its work. For example, a content coordinating committee was created to prevent overlapping and duplication of effort. Six additional groups eventually developed.

One frequently voiced concern about the use of electronic means of communication, especially among the elderly, is that the availability of electronic communication will only increase the isolation of people. The fear is that electronic communication will become a substitute for direct face-to-face communication to the detriment of those involved. The

experiment at the Los Angeles Department of Water & Power offers powerful evidence that electronic communication can augment face-to-face communication and reduce social isolation. The electronic retirees reported recognizing few of their group at the beginning of the experiment. By the project's end, however, the retirees reported recognizing over 90 percent of their group. This change in individual recognition was paralleled by a change in the number of contacts by members of the electronic group. Over the course of the experiment, the number of individual contacts increased most for the electronic retirees. The standard group members tended to work separately and could not even recognize most of their fellow participants when the task was completed.

Anecdotal evidence from other computer conferences also suggests that compared to face-to-face communication, computer conferences are more egalitarian and more open to diversity of opinion. Perhaps this is to be expected as the computer can reduce or eliminate some of the normal barriers to social communication that are created by class, age, gender, status, ethnicity, or color. In the RAND field experiment, the computer conferencing system allowed retirees to participate fully in the work of the task force. The electronic retirees differed little, if at all, from the electronic non-retirees in participation and number of contacts. On the other hand, in the standard group, the retirees tended to remain much more isolated.

In a report at the completion of the experiment, the members of the electronic task force wrote in part:

As a result of the close association required of us by these computers and the scope of the task, a computer communications network has been formed. It is, of course, in its infancy, but we anticipate that it will grow into a large number of participating members. We feel that it will be of great value not only to retirees but also to presently working employees who wish to join the network.

It is hoped that a channel of communication can be established between this new computer network and one or more of the Department of Water & Power periodic publications such as the Intake Magazine, *the* Contact Newsletter, *the* Credit Union Newsletter, *the* Employees' Association Report *or through the Department of Water & Power retirement office.*

The information communicated could relate to whatever is on people's minds at the time, whether it be any of the six issues covered in this report, questions and answers about retirement, special interests, hobbies, travel—anything that concerns employees and retirees who are planning their future.

The experiment conducted by the RAND Corporation with the Los Angeles Department of Water & Power employees confirms the experience of SeniorNet. A computer conferencing system can have a strong facilitating effect on bringing people together to work cooperatively toward a common goal. In this case, the task was pre-retirement planning. Already, however, members of the electronic task force are beginning to think about ways to use this new means of communication for other purposes. For some, these new purposes are likely to be largely social. For others, greater familiarity with this new technology may open possibilities of further employment.

America's Elderly: A Problem—or a Resource

Speakers and writers frequently emphasize the problems, actual and potential, associated with an aging America. Retired and elderly people are expected to claim excessive entitle-

ments including Social Security, require a dis-proportionate amount of medical care, and to exert political influence selfishly to ensure their own welfare. This projection is based on stereotypes that may accurately describe some older people, and that society may convert into a self-fulfilling prophecy; but both the capacities and the desires of most older people make a very different future possible.

Most older people live vigorous, healthy lives. Far from being satisfied to live out their days as social parasites, our elderly want to be involved and to contribute their skills, their experience, and their wisdom. Many want to work. In this essay I have explored how one technology, computer conferencing, can enhance the ability of the elderly to contribute and to work. Computers are likely to have many more advantages for the elderly as new possibilities are examined and as the technology itself improves and becomes less expensive. Communications technology is only part of the answer, but what we already know offers an enormously exciting challenge. We need to find the institutional, organizational, and social ways to enable our older people to be what they want to be—a resource, not a problem.

Lloyd N. Morrisett