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Contemporary Daughter/Son Adult Social Role Performance Rating Scale And Interview Protocol: Development, Content Validation, And Exploratory Investigation

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Contemporary Daughter/Son Adult Social Role
Performance Rating Scale And Interview Protocol:
Development, Content Validation, And Exploratory Investigation

by

Dana Everett Cozad

A dissertation submitted in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy
Department of Adult, Career, and Higher Education
College of Education
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life cycle

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DEDICATION

For my family.

The five parents who have blessed my life:
Ruth, who gave me life;
George, who loved and believed so much;
Katherine, who did not have to, but did;
Lois, who was a model of a mother-in-law; and
Phil, who has shown that life continues to bring surprises.

My two children, Matt and Liz
And the new lives they have brought into mine

My wonderful husband, David;
Together we journey. I love you.

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My husband, David, thank you for enduring the months of mess and for your other ways of supporting. Matt and Liz, you became adult children as I pursued this study. Thank you for bearing it with me.

Thank you all for embracing this research with me.

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Contemporary Daughter/Son Adult Social Role Performance Rating Scale and Interview Protocol: Development, Content Validation, and Exploratory Investigation

Dana E. Cozad

ABSTRACT

The purpose of this study was to develop and content validate a Performance Rating Scale and Interview Protocol, enabling study of the social role performance of adult daughters and sons as they fulfill the societal norms and expectations of adult children. This exploratory investigation was one of 13 contemporary adult social roles completed by the University of South Florida Social Roles Research Group to update research of Havighurst in the 1950s.

The Daughter/Son Performance Rating Scale and Interview Protocol were created through a series of panel reviews and suggestions by experts drawn from adult education, human development, gerontology, and educational measurement and research. A review of the literature identified the initial performance descriptors; ultimately, four strands were identified for inclusion in the study: Involvement, Perception/Attitude, Activities, and Role Improvement. Questions were developed and reviewed by experts again for their relevance to the performance being measured and their clarity; this created the basis for the Interview Protocol.

The resulting instruments were administered to a quota sample of 150 respondents qualified for inclusion by age, gender, socioeconomic status, and racial/ethnicity characteristics. The results were placed in the cells of a 5x3x2 grid reflecting five

socioeconomic levels, three age groups, and two genders, with inclusion of minority race/ethnicity participants added throughout the cells.

Main effects for each of the primary variables were tested, with only gender showing significance, with daughters performing at a higher level than sons. Other demographic characteristics of respondents and their parents were studied for association with role performance. Distance between the Daughter/Son and the parent with whom she/he is most involved and the Daughter/Son's involvement in parents' decision-making were significant. The closer the proximity, the higher the performance rating; the greater the involvement in the parent's decision-making, the higher the performance rating.

Recommendations for further study include a larger population sample study covering a wider geographic range than this study, additional study of demographic characteristics that influence adult Daughter/Son role performance, study of minority differences, and study of the role performance for the younger age level.

CHAPTER 1

INTRODUCTION

In the first half of the 1950s, Robert J. Havighurst and a team of researchers from the University of Chicago undertook a study of adult life, called the Kansas City Study of Adult Life (Havighurst, 1955; Havighurst, 1957; Havighurst & Orr, 1956). In this study, Havighurst and his associates interviewed persons between the ages of 40 years and 70 years to learn about the social roles they occupied and the developmental events associated with fulfillment of those social roles. Ten social roles were identified as a result of Havighurst's study of adult social roles, and this concept of social role and the particular roles identified by Havighurst have been significant markers in adult education with important implications for the discipline (Knowles, 1980; Long, 1983; Witte, 1997/1998).

In the 50 years since Havighurst's study, many changes have taken place in the culture of the United States. Obvious differences include the changed role of women in the workplace and in community life, the changes in family life and structure due to increased rates of divorce and remarriages, the mobility of the population, and the lengthening of the life span. In order to study the impact of societal changes in the intervening years, a series of studies to update Havighurst's social roles was begun at the University of South Florida with the publication of a study by Abney (1992/1993) in which he identified 13 contemporary adult social roles.

Havighurst identified child of an elderly parent as one of the 10 social roles; Abney's research (1992/1993) described the role as daughter or son, without adding the qualifying reference to the age of the parent because Abney's study looked at a broader age range than did Havighurst's. This study focused on the Daughter/Son adult social role in order to develop and content validate an Interview Protocol and Performance Rating Scale for use in additional studies of this social role.

Statement of the Problem

Since the 1950s when the work of the University of Chicago's research team headed by Robert Havighurst conducted several research studies on adult social roles, many changes have taken place in American society, changes that call into question the relevance of Havighurst's findings to contemporary life. Changes in mobility and geographic dispersion have had dramatic impact on families, as have shifts in the workforce to include a large number of women. Changes in expectations related to gender-related behaviors and roles have resulted in a wider range of socially-approved behaviors for both men and women. Advances in medicine and health care have increased quality of life and life expectancy, creating the ability to carry on an active lifestyle well into old age; moreover, these changes result in many persons in their early elderly years still having surviving parents. The family life cycle has also been impacted by increasing divorce/remarriage rates and the blending of families in ways not common in families of the 1950s. The population of most contemporary communities is far more ethnically diverse than were those Havighurst studied as well, and exposure to different cultural norms through daily life and through the media has changed perceptions about

what constitutes cultural norms and the accompanying cultural expectations. In short, families are very different than they were in the 1950s, and the social roles associated with being a family member are different, too.

This study addressed the Daughter/Son social role for persons 18 years of age and older. This social role was identified in Abney's research (1992/1993) as a major social role and was in the highest ranked group for inclusion in the social roles research project. As Bucx, van Wel, Krijn, and Hagendoorn (2008, Theories and hypotheses, ¶ 2) observed, "the relationship between children and their parents remains salient throughout the life course, but . . . this relationship is affected by the life course status of individual family members." This social role was identified in Abney's research (1992/1993) as a major social role and was in the highest ranked group for inclusion in the social roles research project. Havighurst's original studies only included the adult social role of child of aging parent, thus considering the role only in respect to the age-related needs of an elderly parent. The role was not considered at all for other life stages. Similarly, Havighurst did not include this role in his studies of social roles of older persons, perhaps because people who were still engaged in the Daughter/Son role were rare; however, it is not now rare at all to find people in their retirement extremely engaged in the Daughter/Son social role. Havighurst's study needed both expanding and updating with regard to the Daughter/Son role. The Daughter/Son social role needed to be described and studied in terms of the totality of the adult life span in contemporary American society

Rigorous content validation of a performance rating scale and of an interview protocol was needed if the Daughter/Son social role was studied in light of contemporary American social norms and expectations. Since Havighurst's research was conducted, research techniques and procedures have been developed which enable more precise development and testing of a performance rating scale and interview protocol as well as more complex data analysis.

Until the University of South Florida Social Roles research project began, there had been no attempts to address, on a comprehensive scale, the updating of Havighurst's work. Without such research, the foundations he laid for understanding adult learning needs based upon adult social roles and developmental tasks become obsolete for the adult educator in the 21st century. The Daughter/Son role was especially in need of content validated a Performance Rating Scale and Interview Protocol since Havighurst's work on this role was particularly narrow.

Purpose of the Study

The purpose of this study was to develop and content validate a Performance Rating Scale and an Interview Protocol that could be used to define the contemporary Daughter/Son adult social role. Since Havighurst's research was conducted in the 1950s, changes have taken place in American society that call for updating his concepts of the Daughter/Son social role. Havighurst's study is an important theoretical underpinning of adult education programming; therefore, updating Havighurst's research was an undertaking significant for the field of adult education.

Changes that have taken place in American society in the nearly 50 years since Havighurst's groundbreaking work call for re-examination of the Daughter/Son social role. In addition, advances in research and measurement theory and techniques make possible more refined data analysis and interpretation than were available to Havighurst at the time of his studies; and this study applied more sophisticated analytical techniques to data collected regarding the Daughter/Son role. This study, which developed and content validated a Performance Rating Scale and Interview Protocol for use in studying the contemporary Daughter/Son social role, provided for the gathering of information on a more heterogeneous population than Havighurst's samples. It also allowed for data collection on persons across the adult life stages, thus expanding Havighurst's research that considered the role only in regard to the needs of aging parents.

Research Objectives

The research objectives of this study were:

1. To content validate a Performance Rating Scale for the Daughter/Son adult social role to enable researchers to assess the role performance of individual adults across the life span.
2. To content validate an Interview Protocol for the adult social role of Daughter/Son in order that reliable distinctions can be made about the role performance of individuals.
3. To implement the use of the Performance Rating Scale and the Interview Protocol in a study of a quota sample of participants primarily from the

Tampa Bay, Florida, area but including some respondents from South Carolina and elsewhere.

4. To generate data from the exploratory study about the Daughter/Son role performance that could suggest further research possibilities and, in particular, could suggest research related to developmental tasks across the life span that are unrelated to care for an aging parent.

Research Questions and Hypotheses

The following research questions were developed by the University of South Florida Social Roles Research Project and related to objective #4 above. The research questions addressed in this study were:

1. Are there age-related differences in adults' performance of the Daughter/Son adult social role?
2. Are there gender-related differences in adults' performance of the Daughter/Son adult social role?
3. Are there socio-economic status differences in adults' performance of the Daughter/Son adult social role?
4. Are there interaction effects between the age, gender, and socio-economic status variables related to role performance of the Daughter/Son adult social role?
5. Are there activities related to performance of the Daughter/Son social role suggested by the respondents that are not related to the aging and increasing dependency of parents?

6. Are there other significant variables that influence Daughter/Son social role performance?

To verify further the validity of the instruments, based upon the literature and prior research, the following hypotheses were presented:

1. There are gender-related differences in adults' performance of the Daughter/Son social role, with daughters performing at higher levels.
2. There are socio-economic status differences in adults' performance of the Daughter/Son social role.

Significance of the Study

A key assumption about adult education is that adult learning is highly linked to specific situations growing out of adult life experience. Aslanian and Brickell (1980) studied why adults engage in learning activities and what they choose to study. They stated:

The bulk of the data supported our hypothesis that most adults learn in order to move out of some status they must or wish to leave and into some new status they must or wish to enter. That is, their reason for learning was to perform well in the new status. (p. 52)

With regard to the reason for learning, they found that 83% of adults engage in learning as a utilitarian means to an end. Although the most often cited reason for learning among this group was for career-related purposes, the second ranking category was family-related concerns (16%).

For adult educators, understanding adult learning needs is the beginning point for program planning. "Adult educators must be primarily attuned to the existential concerns

of the individuals and institutions they serve and be able to develop learning experiences that will be articulated with these concerns” (Knowles, 1980, p. 54). Knowles’s model for adult education planning has its foundation in Havighurst’s idea that the teachable moment comes in response to the developmental tasks at different life stages and that these developmental tasks are related to the fulfillment of social roles. “Each of these tasks produces a ‘readiness to learn’ which at its peak presents a ‘teachable moment’ These [developmental tasks] of the adult years are the products primarily of the evolution of social roles” (Knowles, 1980, p. 51). Knowles further explicates the relationship of adult learning and social roles in his fourth assumption of the andragogical model of adult education.

Adults become ready to learn those things they need to know and be able to do in order to cope with their real-life situations. An especially rich source of “readiness to learn” is the developmental tasks associated with moving from one developmental stage to the next. (1990, p. 60)

Having data on adult social roles and developmental tasks is, therefore, a key ingredient in adult education program planning; the need for data on contemporary adult social roles is important to planning relevant adult education in the new millennium. “Although the timeframe and some of the tasks suggested by Havighurst are somewhat dated, the idea of specific life tasks giving rise to a teachable moment is not” (Merriam, Cafferella, & Baumgartner, 2007, p. 308).

This study provides tools for future researchers to gather information about the Daughter/Son social role that can aid administrators of adult education programs with developing programs and curricula related to developmental activities associated with the

Daughter/Son adult social role. This study's tools enable adult educators to update and redefine the adult social role of Daughter/Son. With the content validation of a Performance Rating Scale and an Interview Protocol for conducting further research into this social role, valid and reliable data can be collected that will inform the adult educator about the life demands adults face with regard to their Daughter/Son social role. Information gathered in this study about demographic variables (age, gender, SES), the interaction effect between demographic variables on role performance, and the influence of certain environmental/situational variables (i.e., geographic proximity and the number of living biological or adoptive parents) have provided data that can be analyzed in more depth on variables that potentially impact Daughter/Son role performance.

This study was also significant because of what it suggested regarding areas of inquiry that might increase the body of knowledge about the Daughter/Son role in the adult years as it relates to developmental tasks apart from those related to caring for aging parents. The paucity of literature related to the Daughter/Son adult social role in any context except as it relates to the increasing dependency of aging parents indicated that there were important aspects of this role that had not been identified and researched. Abney's research found, for example, that the Daughter/Son role was the most highly ranked adult social role by the young respondents (age 18-34 years) in his community survey ranking adult social roles by order of importance to them; this finding suggested that further study of this role may provide much more information than was currently available about what makes this role so important to that younger age group. Further evidence of this need would also be implied from the developmental tasks identified by

the expert panels, who identified six developmental tasks associated with the Daughter/Son role. Four of the six developmental tasks focused on the role in relation to needs of aging parents, while only two developmental tasks spoke to other aspects of the relationship. This study suggested additional activities associated with the Daughter/Son role that may be explored further.

Social Roles Research Project

The importance of adult social roles to program planning for adult educators has been cited by Havighurst (1955); Knowles (1980, 1990); Darkenwald and Merriam (1982); Merriam, Caffarella, and Baumgartner (2007); and Aslanian and Brickell (1980). In order to update, revise, and content validate Havighurst's work in the 1950s, a team of researchers from the University of South Florida began a process of identifying contemporary adult social roles, developing Performance Rating Scales to rate performance levels, constructing Interview Protocols to gather data on the identified adult social roles, and utilizing those instruments to conduct a quota sample study in the Tampa Bay area of Florida.

Abney (1992/1993) and McCoy (1993/1994) identified 13 contemporary adult social roles: association/club member, citizen, Daughter/Son, friend, grandparent, home/services manager, kin/relative, learner, leisure time consumer, parent, religious affiliate, spouse/partner, and worker. Previous research has been concluded on the association/club member (Montgomery, 1997/1998); citizen (Barthmus, 2004/2005); friend (Dye, 1998); grandparent (Rogers, 2004/2005), home/services manager (Wall, 1997/1998); kin/relative (Yates-Carter, 1997/1998); learner (Witte, 1997/1998); leisure

time consumer (Hargiss, 1997/1998); parent, spouse/partner, worker (Kirkman, 1994/1995; Davis, 2002); and religious affiliate (McCloskey, 2000). This study contributes to the research on the Daughter/Son social role for the entire project on social roles.

Limitations of the Study

This study had certain inherent limitations. First, it was based upon self-report rather than observation of actual behavior. The self-report method may lend itself response effect (i.e., to inaccurate reporting of actual behaviors, either due to miscalculation, to forgetfulness, to enhancing responses to reflect behavior perceived by the respondent to be more socially acceptable or other form of biasing of data) (Borg & Gall, 1989).

A limitation of the data from the quota sample was that it was drawn primarily from one community, the Tampa Bay area of Florida. Though the Tampa Bay area offered a diverse, heterogeneous population, data more geographically representative of the United States might be required to draw conclusions about the Daughter/Son social role across the country.

Definition of Relevant Terms

For the purposes of this study, the following definitions of terms were used:

Adult--"A person who performs socially productive roles and who has assumed primary responsibility for his/her own life" (Darkenwald & Merriam, 1982, p. 8).

Adult Education--"Adult education is a process whereby persons whose major social roles are characteristic of adult status undertake systematic and sustained learning

activities for the purpose of bringing about change in knowledge, attitudes, values, or skills” (Darkenwald & Merriam, 1982, p. 9).

Age Group--Group into which respondents will be assigned based upon chronological age at the time of the interview. The three groups to be used in this study were:

Young--18 to 34 years; Middle--35 to 64 years; and Older--65 years or more.

Daughter/Son--A child by birth, adoption, marriage of a parent (i.e., step-child), or by marriage (i.e., son-in-law or daughter-in-law).

Developmental Event—According to Abney (1992/1993), a developmental event is,

A specific occurrence (e.g., marriage) or a series of activities (e.g., raising a child) in adult life that are related to performance of a particular social role. Generally each occurrence can be viewed as a life task related to social activities rather than biological or mental maturation processes. A developmental event may be transitional in nature indicating a shift between phases of social role (i.e., acquisition of a new family member through birth or adoption). (pp. 9-10)

Developmental Task—Havighurst’s term for the:

basic tasks of living, which must be achieved if we are to live successfully and to go on with a good promise of success to the later stages of life.

The developmental tasks are set for us by three forces: (1) the expectations of values of our society; (2) the maturing and then the aging of our bodies; and (3) our own personal values or aspirations. (Havighurst & Orr, 1960, p. 7)

Interview Protocol--An interview format of a series of questions that provides for the gathering of information to be used in rating the social role performance.

Parent--A father or mother, including relationships by virtue of birth, adoption, marriage to a child’s parent (i.e., step-parent relationships), or marriage to the parent’s child (i.e., in-law relationships).

Performance Level--The category describing the degree of conformity to usual societal expectations for the behaviors, attitudes, skills, and degree of involvement reported by the study's respondents to an Interview Protocol regarding the adult social role of Daughter/Son. Performance level was scored in five categories, each with two levels, and which were assigned points as follows: Low (0 to 1 point); Below Average (2 to 3 points); Average (4 to 5 points); Above Average (6 to 7 points); High (8 to 9 points).

Performance Rating Scale--Common American standards for the performance of the Daughter/Son social role defined by the explicit criteria developed and verified by a panel of content and research experts.

Performance Rating Score--The quantitative ranking of a respondent's self-reported current performance level of the Daughter/Son social role compared to common American standards for performance of the role.

Social Role--A social science construct which is a constellation of behaviors, attitudes, functions, and relational positions formed by normative expectations of a society for an individual's performance of certain duties. "A social role is a coherent set of activities that is recognized and judged by others as something apart from the individual who happens to fill it" (Havighurst & Albrecht, 1953, p. 43).

Socioeconomic Status (SES) Level--"The composite of social and economic attributes that combine to indicate a relative position within contemporary American society" (James & Abney, 1993, p. 4). For this study, the measure of SES used was the socioeconomic status measure developed by James and Abney (1993). It represented a

score based upon three components--occupation, education, and income--ranked at five status levels.

Strand--"Identification of components of a social role, which aid in defining and organizing the domain" (Witte, 1997/1998, p. 7).

Organization of the Study

This study was organized into five chapters. Chapter 1, the Introduction, includes an introduction to the study, a statement of the problem, a discussion of the purpose of the study, a statement of the research questions and hypotheses, a discussion of the significance of the study, a description of the University of South Florida social roles research project, a discussion of the limitations of the study, a section defining relevant terms, and a description of the organization of the study.

Chapter 2 is the Review of the Literature. Scholarly literature on adult development, family life cycle and the adult social roles of sons and daughters, social role theory, Havighurst's social role research, content validation concepts and procedures, and the University of South Florida Social Roles research project is presented in Chapter 2.

Chapter 3, Methods, presents the research methods of the study. Discussions of the procedures utilized in the development and validation of the Performance Rating Scale, the procedures utilized in the development and validation of the Interview Protocol, and the use of expert panels in the development processes are included. Description of the implementation of the study addressed the training regimens for interviewers and raters, the field testing procedures, and the quota sample selection. Finally, data collection and analysis methods are presented.

Chapter 4 describes the results of the study. Findings and interpretations of the development and implementation of the Performance Rating Scale and the development and implementation of the Interview Protocol are presented. Results of the data collection and data analysis are included.

Chapter 5 presents the summary, conclusions, implications, and recommendations resulting from this study.

CHAPTER 2

REVIEW OF THE LITERATURE

The purpose of this study was to develop and content validate a Performance Rating Scale and Interview Protocol that can be used to define the contemporary Daughter/Son adult social role. This chapter presents a review of the literature relevant to the development and content validation of a Performance Rating Scale and Interview Protocol for the Daughter/Son social role. The chapter presents literature regarding the concepts of social role and adult education. Next, it presents a review of the adult development most directly related to social roles and the Havighurst studies of adult social roles and the University of South Florida Social Roles Research Project. Finally, literature concerning the Daughter/Son role and the methods and variables used in this study are presented.

Since Havighurst's influential research on adult social roles was conducted in the 1950s, changes have occurred in contemporary society; and these changes have dated some of the specific information from Havighurst's research (Merriam, Caffarella, & Baumgartner, 2007). The centrality of his research to the concept of developmental tasks providing the basis for understanding adult education needs pointed to a necessity to update Havighurst's research. The University of South Florida Social Roles Research Project was formed in order to study contemporary American adult social roles, and this study was part of this larger research effort to update the adult social roles research

conducted by Robert Havighurst in the middle of the 20th century. Thirteen studies laying the foundation for the research and then developing and content validating Performance Rating Scales and Interview Protocols (Abney, 1992/1993; Barthmus, 2004/2005; Davis, 2002; Dye, 1998; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 2000; McCoy, 1993/1994; Montgomery, 1997/1998; Rogers, 2004/2005; Wall, 1997/1998; Witte, 1997/1998; Yates-Carter, 1997/1998) had been completed prior to this study. This study completed development and content validation of a Performance Rating Scale and Interview Protocol for the last of the contemporary adult social roles identified by Abney (1992/1993) and McCoy (1993/1994).

Social Role Theory and Adult Education

Because humans organize themselves into social organizations in order to accomplish the day-to-day tasks of living, they must cooperate and differentiate tasks. The study of social roles derives from the desire to understand human social structures and the behaviors of persons within those structures. Banton (1965) writes:

Men must organize. In order to obtain food and shelter, to guard against periods of shortage or misfortune, and to propagate their own kind, men are obliged to cooperate with their fellows. Every society, in fact, can be viewed as a division of labour suited to its environment; particular members are given their tasks to perform on behalf of the group; norms as to proper behaviour in given circumstances are established, and sanctions are developed to reward people for worthy conduct and punish them for deviations. (p. 1)

The study of the roles that people play within their social units is one means of developing theoretical understandings of social life. “The idea of role has become so much a part of our general culture that it is difficult to realize that it was formulated as a technical term only in the 1930s” (Bohannan & Glazer, 1988, p. 184). According to

Bohannan and Glazer (1988), it was Linton, a social anthropologist, who first wrote extensively about role as a social science construct. “The idea of role is an intellectual tool . . . remarkably illuminating when brought to bear upon many facets of social life” (Banton, 1965, p. 3).

Linton linked the concepts of status and role definitionally.

Status refers to positions within structures of reciprocity and can be regarded as the sum of an individual’s rights and duties within a society. On the other hand, role refers to the behavioral aspect of status. When rights and duties are acted out, an individual plays his role in society. . . . Role as a concept refers to experienced behavior; and status, to the cognitive aspects of society. (1936/1988, p. 185)

Linton’s description of the concepts of status and role highlighted the relationship between status and role.

A role represents the dynamic aspect of a status. The individual is socially assigned to a status and occupies it with relation to other statuses. When he puts the rights and duties which constitute the status into effect, he is performing a role. Role and status are quite inseparable, and the distinction between them is of only academic interest. There are no roles without statuses or statuses without roles. Just as in the case of status, the term role is used with a double significance. Every individual has a series of roles deriving from the various patterns in which he participates and at the same time a role, general, which represents the sum total of these roles and determines what he does for his society and what he can expect from it. (Linton, 1936/1988, p. 186)

There is not, however, a universally accepted definition of “social role” in the social sciences. The social science disciplines of psychology, anthropology, and sociology each uses the concept for descriptive and research purposes, but there are subtle differences in understanding, particularly with regard to an understanding of the point of origin for social roles. Banton cites two traditions for the study of social role: “the dramatic tradition starts from role as a metaphor emphasizing the selection and

performance of parts by a single performer” (1965, p. 21). The dramatic tradition is associated with social psychology. The second tradition has more affinity with social anthropology and sociology.

The structural tradition has its inspiration in the legal view of social relations. People’s behaviour is viewed from the standpoint of the relationships within which it takes place, and the relationships are defined by the rights and obligations of the parties. A role is in this sense a pattern of expected behaviour reinforced by a structure of rewards and penalties which induces individuals to conform to the pattern. (Banton, 1965, p. 22)

Deasy (1964) describes three groupings of social role definitions: those that center on normative culture patterns of desirable behavior, those that focus on an individual’s understanding of her/his position relative to others’ positions, and those that look at what is actually being enacted by those occupying social positions. Deasy further observes that, in spite, of differences in the definitions, there is useful common ground and consistency among approaches. “The basic ideas in most conceptualizations about roles are that: individuals (1) in social locations (2) behave (3) with reference to expectations” (Deasy, 1964, p. 4). Theorists utilize various constructs to categorize social roles. Linton, writing about statuses, described them as falling into two groups: ascribed and achieved (1936/1988, p. 186).

Ascribed statuses are those which are assigned to individuals without reference to their innate differences or abilities. They can be predicted and trained for from the moment of birth. The achieved statuses are, as a minimum, those requiring special qualities, although they are not necessarily limited to these. They are not assigned to individuals from birth but are left open to be filled through competition and individual effort. The majority of the statuses in all social systems are of the ascribed type and those which take care of the ordinary day-to-day business of living are practically always of this type. (Linton, 1936/1988, p. 187)

Because Linton’s definitions of status and role are so interdependent, others have incorporated his labels to describe roles in terms of ascribed and achieved (Banton, 1965). Further definition within these two groups is reflected in Banton’s adaptation of Nadel’s role classification system. See Table 1 for Nadel’s simplified classification system providing terms related to social roles.

Table 1.

Nadel’s Role Classification–Simplified

<i>Ascribed Roles</i>		<i>Achieved Roles</i>				
		<i>Non-Relational</i>			<i>Relational</i>	
<i>Non-Relational</i>	<i>Relational</i>	<i>Proprietary</i>	<i>Expressive</i>	<i>Service</i>	<i>Symmetrical</i>	<i>Asymmetrical</i>
age, sex, race, and descent	kinship	smith, diviner, sage, and other roles characterized by the possession of skills, resources, or learning	Demonstrator, artist, orator, and similar roles indicating belief, creativeness	Teacher, salesman, labourer and other occupational roles	Colleague, partner, rival	Manager, leader, patron, etc. Hierarchical roles

Note. Banton, 1965, p. 31.

Banton posits another model for understanding social roles in terms of role differentiation. He defines roles differentiation as “the extent to which incumbency of one role is independent of incumbency of other roles” (1965, p. 30). He elaborates that gender roles are less independent than age roles, which are less independent than occupational roles; the roles of student or user of leisure time would be very independent roles since they can be engaged by many people quite independently of other roles.

Banton also indicated that there are, within general role categories, some

subgroups that have less independence than others. For example, a policeman would have less role independence than a gardener in that there would be tighter constraints in terms of society's expectations of other roles and the appropriateness of behaviors appropriate for the roles (Banton, 1965).

Havighurst leans toward the social psychological tradition in his studies, with focus given to role performance as in the dramatic tradition described by Banton (1965).

The social role construct has been useful in two ways. First it facilitates thinking and discussion about the activities and the social adjustment of people. Probably 90% of our waking time is spent in one or another of a dozen social roles. These roles are grouped by people into characteristic clusters called life-styles. The second use of the social role construct is as the major set of variables for a research design that aims to study quantitatively the behavior of various groups of people and to relate this behavior to their social adjustment and life satisfaction. (Havighurst, 1973, p. 599)

Havighurst also conceptualizes a grouping of adult social roles. His model has three broad categories (family, work, and community), and then he adds leisure activity as a fourth category (Havighurst, 1973). His interest in social roles was primarily in their relevance to flexible life-styles and the changes in role performance that occur through the life span (Havighurst, 1973). He commented on the importance of social role research:

The need for these studies is especially important in view of the growing salience of the concept of flexible life-styles. As people pass through adult life, they reorder and realign their social roles, partly through choice and partly through necessity. Some do this more readily than others. Preretirement counseling and education may have this kind of role flexibility as a goal. (Havighurst, 1973, p. 599)

Havighurst indicated that the study of social roles and the associated developmental tasks provides essential information for adult educators (Chickering &

Havighurst, 1981; Havighurst, 1963; Havighurst & Orr, 1956). By understanding social roles and the behaviors required for successful performance of them, individual role performance can be compared. If there are gaps in expectation and performance, there may be potential for educational programming. “There is a social need for improved performance of the developmental tasks of adulthood whenever a considerable group of people fall below the level of average or passable performance” (Havighurst & Orr, 1956, p. 37). If there is strong motivation to improve performance, the potential is even greater.

It appears that such a study can supply the educator with useful knowledge concerning the present level of performance by people of their developmental tasks in adult life, and concerning their motivation for effort in the various developmental task areas.

Equipped with this kind of knowledge the educator with skill in working with and through the adult associations of a community and with a grasp of methods and materials for teaching adults can choose the areas of program which seem to him most important for educational effort. (Havighurst & Orr, 1956, pp. 65-66)

In a later study, Aslanian and Brickell illuminate reasons for adult learning. Their research reports that 83% of the Americans studied indicated “some past, present, or future change in their lives as reasons to learn” (1980, p. 49).

Knowles (1980) observes that the developmental tasks that are the behavioral expectations of social roles produce “a ‘readiness to learn’ which at its peak presents a ‘teachable moment’” (p. 51). Furthermore, writes Knowles,

Adults . . . have their phases of growth and resulting developmental tasks, readiness to learn, and teachable moments. But whereas the developmental tasks of youth tend to be the products primarily of physiological and mental maturation, those of the adult years are the products primarily of the evolution of social roles. The requirements for performing each of these social roles change, according to Havighurst, as we move through the three phases of adult life, thereby setting up

changing developmental tasks and, therefore, changing readiness to learn. (Knowles, 1980. p. 51)

The University of South Florida Adult Social Roles Research Group's project to update Havighurst's mid-twentieth century studies of adult social roles was undertaken with the belief that social roles were still a valid construct for understanding and interpreting adult education needs.

Adult Development

An underlying rationale for this study of the contemporary adult social role of Daughter/Son and the University of South Florida Research Project as a whole was to inform adult educators about adult learning needs for program planning purposes. An important strand of literature relevant to this purpose is the literature on adult development. Knowles (1980) makes clear the relationship of adult development, social roles, and adult education needs in his discussion on the assumptions about andragogy, defined as "the art and science of helping adults learn" (p. 43). Among the four crucial assumptions about learners' characteristics, Knowles indicated that "as individuals mature. . . their readiness to learn becomes oriented increasingly to the developmental tasks of their social roles" (p. 43). Hence, according to Knowles, the study of social roles and the associated developmental tasks is essential information for adult educators attempting to construct programs to meet adult learners' needs. Furthermore, Aslanian and Brickell (1980) found in their study of adult learners that 83% of their respondents cited that their reason for undertaking a learning activity was "learning to cope with life changes" (p. 51). Cross (1981), likewise, observes

The necessity to adapt to changing circumstances of life . . . constitutes a powerful motivating force for learning. Some changes are almost universal and represent the phases of the life cycle: first job, marriage, children, increasing responsibility on the job and in the community, retirement, and so forth. Other changes may be sudden and traumatic: loss of job, divorce, illness, death of spouse. Research on the life cycle and on life changes that “trigger” learning . . . shows that at some periods in life the motivation for learning is exceptionally high. (p. 144)

Theories of adult development have been organized according to a variety of constructs. Cross (1981) used a convention that places the literature into two categories: those that refer to phases of the life cycle and those that refer to developmental stages. The critical difference is the implication of hierarchical movement from simple to more complex structures in stage theories, while phase theories are largely descriptive of predictable life changes, but carry no connotation of evolution toward a more desirable or advanced developmental goal. Bee and Bjorklund (2000) organize the discussion of adult development theory along two dimensions, with development versus change as one dimension and stage versus no stage as the second dimension; these two dimensions form a four-quadrant grid into which theories can be placed. The extent to which a theory links a chronological framework to the developmental process is another distinction that can be drawn among developmental theorists. Developmental theories can also be distinguished by the extent to which they explicitly incorporate social context into the theory. In this study of the Daughter/Son contemporary adult social role, theories of adult development that speak to social role and/or developmental tasks as important factors in some aspect of the developmental process are emphasized in the literature review.

Erikson

Erik Erikson was an artist who, through the serendipity of teaching the young children of the students studying under Sigmund Freud at the Vienna Psychoanalytic Institute, was trained by Freud as a psychoanalyst and then became a major contributor to, and extender of, Freudian psychoanalytic theory. In Erikson, the historical and societal dimensions of psychological development are added to Freud's theories. Where Freudian psychology focused on the development of a child from a psychosexual point of view, it was Erikson who saw that development always takes place as the interplay among the biological, historical, and cultural contexts. "He proposes that psychosocial development continues over the entire life span, resulting from the interaction between inner instincts and drives and outer cultural social demands" (Bee & Bjorklund, 2000, p. 35). Furthermore, Freud described psychosexual development as a process completed with sexual maturity at the end of adolescence whereas Erikson looked at development as a psychosocial process paralleling psychosexual development through the years of childhood, but then he extended his theory throughout the life cycle. Erikson is the forerunner of contemporary developmental psychology's attention to human development throughout the adult years, even to the approach of death. Erikson saw human development as an unfolding process of identity formation that emerges through eight stages during the lifetime (Bee & Bjorklund, 2000).

Erikson's description of the eight developmental stages is grounded in the principle of epigenesis, which is modeled upon embryonic growth. "This principle states that anything that grows has a ground plan, and that out of this ground plan the parts

arise, each part having its time of special ascendancy, until all parts have arisen to form a functioning whole” (Erikson, 1968, p. 92). While Erikson recognized that there may be wide variability in the opportunities for encounter with culture and society, his eight stages proceed, nonetheless, in a prescribed sequence of “crises” during which the developing personality is challenged to resolve critical tensions between syntonic and dystonic forces in order to acquire certain psychosocial strengths. “The syntonic supports growth and expansion, offers goals, celebrates self-respect and commitment of the very finest” (Erikson & Erikson, 1997, p. 106). The dystonic represents those forces that negatively challenge development in positive directions. “Personality, therefore, can be said to develop according to steps predetermined in the human organism’s readiness to be driven toward, to be aware of, and to interact with a widening radius of significant individuals and institutions” (Erikson, 1968, p. 93). At each stage, the success with which the conflict is resolved toward the syntonic response determines the resources with which the person faces the challenges of the next stage. At any point in life, successful resolution of the preeminent crisis, therefore, is built upon what has transpired in previous stages and will determine the success of the resolution of future crises (Erikson 1968, 1997).

Erikson’s developmental theory was particularly relevant for this study because he posits human psychological development squarely in social context where identity formation and the development of psychosocial strengths form and emerge in the interaction between the unique biological organism/person and the reaction of the surrounding culture to that person. Hence, the cultural interpretation of the individual

personality inevitably interacts with self-perception to drive the formation of a sense of identity (vs. identity confusion) and its refinement through the life span. Social role acquisition and the ensuing judgment of society about the success with which the individual has met role expectations are essential elements in the psychosocial developmental process described by Erikson.

Stages of Psychosocial Development

Basic Trust vs. Mistrust: Hope. The foundation of all future development is laid at the beginning of the infant's experience of the world through the physical and emotional care provided by his guardians. The child whose caretakers provide a sense that his/her needs will be met develops an orientation to life that trusts the world to be a place where he/she can survive and where others can be depended upon in relationships; likewise, the self can be trusted to control internal urges and to extend into the external world.

Mothers create a sense of trust in their children by that kind of administration which in its quality combines sensitive care of the baby's individual needs and a firm sense of personal trustworthiness within the trusted framework of their culture's life style. This forms the basis in the child for a sense of identity which will later combine a sense of being "all right," of being oneself, and of becoming what other people trust one will become. There are, therefore, (within certain limits previously defined as the "musts" of child care), few frustrations in either this or the following stages which the growing child cannot endure if the frustration leads to the ever-renewed experience of greater sameness and stronger continuity of development, toward a final integration of the individual life cycle with some meaningful wider belongingness. (Erikson, 1963, p. 149)

Beyond the essential requirements for the survival of the infant (the "musts" of childcare to which Erikson refers above), the manner in which needs may be met may vary widely among cultures and reflect the cultural assumptions about how one receives

and gives within that culture. From the earliest beginnings of life, desired cultural behaviors about how one interacts with the external world are embedded into the infant's experience, signaling ways of being which are affirmed by the culture and which lay the foundation for the child to begin to become the kind of person who is recognized by his culture as belonging to it and having a place in it. The psychosocial strength emerging from this foundational stage is hope. "Basic trust is the confirmation of hope, our consistent buttress against all the trials and so-called tribulations of life in this world" (Erikson & Erikson, 1997, p. 107).

Autonomy vs. Shame and Doubt: Will. In this second stage, the development of the muscular system is central to the psychosocial conflict in the child. Around age two, the child is able to move more freely about his/her environment and to begin to manipulate it and control it. A sense of autonomy, or free will, is introduced. He/she also begins to experience the ability to control the self, both in terms of will and his or her own body. A sense of separate self is developing, the knowledge that one can express a choice and make demands are experienced, and the tension between holding on and letting go emerges. The child learns that he or she has a will, but also that he/she must control it and that he/she must resolve the conflicts within the self. The child can develop an extreme conscience and a compulsive need for order. If the attempts at helping him/her to learn the appropriate parameters for exercising autonomy are heavy-handed or shame the child, the result may be a sense of vulnerability and self-doubt, or in extreme cases, reject limitations on autonomy and become secretively defiant of the limitations imposed. "There is a limit to a child's and an adult's individual endurance in the face of

demands which force him to consider himself, his body, his needs, and his wishes as evil and dirty, and to believe in the infallibility of those who pass such judgment” (Erikson, 1968, p. 111). Furthermore, Erikson observes, “People all over the world seem convinced that to make the right (meaning *their*) kind of human being, one must consistently introduce the senses of shame, doubt, guilt, and fear into a child’s life. Only the patterns vary” (1980, p. 74).

The social institution which is the reinforcement to this developmental stage’s gains is the principle of law and order; it is the formal rules of a particular society that dictate the limitations of individual autonomy. The child’s experience of social expectations for acceptable expressions of autonomy comes largely through the parents, according to Erikson.

The kind and degree of a sense of autonomy which parents are able to grant their small children depends on the dignity and sense of personal independence they derive from their own lives. We have already suggested that the infant’s sense of trust is a reflection of parental faith; similarly, the sense of autonomy is a reflection of the parents’ dignity as autonomous beings. (Erikson, 1968, p. 113)

Parental satisfaction levels in marriage, in the workplace, and in citizenship often determine the degree of autonomy the parents are able to grant their children (Erikson, 1968, 1980). “This in turn necessitates a relationship of parent to parent, of parent to employer, and of parent to government which reaffirms the parent’s essential dignity within the hierarchy of social positions” (Erikson, 1968, p. 76). He cites the growing complexity of modern society as a potential constraint on parents’ ability to provide a positive context for the stage two psychosocial development of a child.

All great nations (and the small ones) are increasingly challenged by the complication and mechanization of modern life, and are being enveloped in the problems of the organization of, larger units, larger spheres, and larger interdependencies which by necessity redefine the role of the individual. (Erikson, 1968, p. 77)

Thus, through the experience of the parents' sense of place and value in the social order, of rights and obligations established by the institutionalized principle of law and order, the child develops his/her sense of him/herself as an autonomous human being and lays the foundation for stage three where the child begins to anticipate his/her own social roles.

Initiative vs. Guilt: Purpose. During the fourth and fifth years, the child begins to conceive his place in the larger world. The ability to run without thinking about controlling the muscles, the development of language, and the emergence of imagination all enable the child to begin to perceive himself as a part of a larger social order. It is also a time when the child experiences peers in mutual play for the first time. "Being firmly convinced that he *is* a person, the child must now find out *what kind* of person he is going to be" (Erikson, 1980, p. 78). During this stage, the child develops an identification with the same sex parent as well as a sense of rivalry for the affections of the opposite sex parent; in Freudian terms, this is the Oedipal stage. Not only does the child become aware of sexual differences between father and mother, boys and girls, his imagination also enables him to project him/herself into the parental roles, and it is, therefore in this stage that Erikson says that a child first anticipates adult roles. In fact, in *Identity: Youth and Crisis*, Erikson titles the section describing the third stage "Childhood and the Anticipation of Roles" (1968, p. 115).

He begins to make comparisons and is apt to develop untiring curiosity about differences in size and kind in general, and about sexual and age differences in particular. He tries to comprehend possible future roles or, at any rate, to understand what roles are worth imagining. (Erikson, 1968, p. 116)

Initiative, defined by Erikson as “a realistic sense of ambition and purpose” (Erikson, 1968, p. 115), is the systonic side of the developmental conflict in this stage; guilt is the dystonic possibility at this stage, for just as the child can imagine possibilities, he/she can also imagine doing terrible things that can leave feelings of fear and guilt. Conscience is developing, which enables an individual to set behavioral parameters according to socially-approved norms but which, in extreme, can create such a sense of having committed terrible crimes that the healthy pursuit of goals and ambitions, of fulfillment of potentialities, is crippled in later life (Erikson, 1968, 1980).

Industry vs. Inferiority: Competence. This stage is marked by the systematic instruction of the child by whatever formal or informal processes the culture has adopted to inculcate the necessary skills to become a functioning member of the culture. It is during this time that, in literate cultures, the child begins formal instruction in school and in which he/she is taught to read and manipulate the other tools required by society of its productive members. He/she moves from a world of play to one in which one learns to produce and to work cooperatively with others to accomplish goals. He/she begins to learn to become a worker, and the sense of self begins to include the repertoire of skills and tools he/she has mastered. The child’s concept of self also expands to include the degree to which he/she perceives him/herself to be competent. Satisfaction with doing a task and completing it is motivating. Role models include teachers and other adults,

another indication that the world of the child has broadened to include other possibilities for social roles.

Thus the *fundamentals of technology* are developed, as the child becomes ready to handle the utensils, the tools, and the weapons used by the big people. Literate people, with more specialized careers, must prepare the child by teaching him things which first of all make him literate, the widest possible basic education for the greatest number of possible careers. The more confusing specialization becomes, however, the more indistinct are the eventual goals of initiative, and the more complicated social reality, the vaguer are the father's and mother's role in it. School seems to be a culture all by itself, with its own goals and limits, its achievements and disappointment. (Erikson, 1963, p. 259)

This stage is a critical one for the all-important identity formation that comes during adolescence; it is at this time that the child develops a sense of his worth to his culture and his position in it relative to his peers based upon his work.

This is socially a most decisive stage. Since industry involves doing things beside and with others, a first sense of division of labor and of differential opportunity—that is, a sense of the *technological ethos* of a culture—develops at this time. Therefore, the configurations of culture and the manipulations basic to the *prevailing technology* must reach meaningfully into school life, supporting in every child a feeling of competence—that is, the free exercise of dexterity and intelligence in the completion of serious tasks unimpaired by an infantile sense of inferiority. This is the lasting basis for co-operative participation in productive adult life. (Erikson, 1968, p. 126)

Identity vs. Identity Diffusion or Role Confusion: Fidelity. The fifth stage is the period in which the search for individual identity is ascendant. “It is for this fifth stage, the adolescent identity crisis, that Erikson is best known” (Sugarman, 1986, p. 88). The central developmental challenge during this period is creating an ego identity, which Erikson asserts is a consistency and predictability of the inner self and the confidence that one has a stable meaning to others (Erikson, 1963, 1968, 1980). Identity is the result of “an individual's link with the unique values, fostered by a unique history, of his people”

(Erikson, 1980, p. 109) as well as the unique development of an individual. Hence identity contains within it both one's unique internal constancy of self as well as a constancy in what one means to others and the extent to which there exists "a persistent sharing of some kind of essential character with others" (Erikson, 1963, p. 109). Erikson describes the adolescent or teenage years as a period of transition between childhood and adulthood, a time when the crises and strengths from psychosocial development during the first four stages of development must be reconsolidated into an identity that will become the foundation for the adult stages. "A pervasive sense of identity brings into gradual accord the variety of changing self-images that have been experienced during childhood . . . and the role opportunities offering themselves to young persons for selection and commitment" (Erikson & Erikson, 1997, p. 73).

This period of identity formation is a turbulent one, exacerbated by the confluence of critical psychosocial developmental tasks with a rapidly changing physical body. The physical growth of the body and the arrival of sexual maturity create an especially tumultuous context for this developmental stage. The period is one of particular significance for developing social roles. According to Erikson,

The integration now taking place in the form of ego identity is . . . more than the sum of the childhood identifications. It is the accrued experience of the ego's ability to integrate all identifications with the vicissitudes of the libido, with the aptitudes developed out of endowment, and with the opportunities offered in social roles. The sense of ego identity, then, is the accrued confidence that the inner sameness and continuity prepared in the past are matched by the sameness and continuity of one's meaning for others, as evidenced in the tangible promise of a "career." (Erikson, 1963, pp. 261-262)

Bee and Bjorklund further illuminate the psychosocial challenge of the teen years.

Teenagers must not only consider what or who they *are* but who or what they *will be*. Erikson . . . suggests that the teenager or young adult must develop several linked identities: an occupational identity (what work will I do?), a gender or gender-role identity (how do I go about being a man or a woman?), and political and religious identities (what do I believe in?). If these identities are not worked out, the young person suffers from a sense of confusion, a sense of not knowing what or who he is. (2000, pp. 36-37)

It is the overwhelming sense that one is becoming who he or she will be in the future and the working out of one's place in the social order that gives rise to the adolescent culture that is characterized by the paradoxical tension between individualism and conformity. Erikson describes the strong group affiliations that are so important during the adolescent years as a means of defense against identity loss; while the individual is struggling with an insecure sense of who he or she is, the group provides an identity built upon stereotypes, peer pressure, and artificial yet clear distinctions about who one is within the group and what that means in relation to those who are not in the group. It is also a time when affiliation with negative groups and identities can lead an adolescent into delinquent behaviors and into identity confusion or into an identity as an outsider who is not acceptable to the social mainstream of his/her culture and whose future success in it is tenuous (Erikson, 1968; Erikson & Erikson, 1997). Furthermore, "it is the inability to settle on an occupational identity which most disturbs young people" (Erikson, 1968, p. 132). Throughout this fifth stage of development, the importance of social roles is an underlying theme as the young person seeks to determine his place in the social order of his/her world.

The Adult Stages. Through the consolidation of psychosocial developmental strengths gained from the first four stages and the successful resolution of the fifth stage,

three adult stages of development completing the life cycle are framed. “When childhood and youth come to an end, life . . . begins: by which we mean work or study for a specified career, sociability with the other sex, and in time, marriage and family of one’s own” (Erikson, 1980, pp. 100-101). His attention to the adult years is a distinguishing feature of Erikson’s work as compared to that of Freud, whose work ended with the closing of the adolescent chapters. For Erikson, adulthood is a continuation of the identity formation process that begins at birth. These stages, those “beyond identity” (Erikson, 1968, p. 135), follow the identity crisis of youth as the adult’s developmental stages turn on the ability to extend from self to others in ever-broadening spheres while, at times, revisiting the identity crises of previous stages. Erikson describes the fabric of the adult developmental stages as the acquisition and shedding of social roles.

Intimacy vs. Isolation: Love. In the sixth stage, the young adult is faced with establishing intimate relationships; or if he or she fails in the challenges of this stage, of being isolated from true connection with another human being. Such a person “may settle for highly stereotyped interpersonal relations and come to retain a deep *sense of isolation*” (Erikson, 1968, p. 136). In contrast to the previous challenge of establishing a firm sense of individual identity and an intimacy with the self, now the task is to develop the capacity to fuse one’s identity with another. The young adult “is ready for intimacy, that is, the capacity to commit himself to concrete affiliations and partnerships and to develop the ethical strength to abide by such commitments” (Erikson, 1963, p. 263).

Young adults emerging from the adolescent search for a sense of identity can be eager and willing to fuse their identities in mutual intimacy and to share them with individuals who, in work, sexuality, and friendship promise to prove

complementary. One can often be “in love” or engage in intimacies, but the intimacy now at stake is the capacity to commit oneself to concrete affiliations which may call for significant sacrifices and compromises. (Erikson & Erikson, 1997, p. 70)

Distantiation, or the willingness to distance oneself from those things which pose a threat or danger to oneself or one’s own, is a counterpart to intimacy, and it may lead to an accentuation of differences as one “fortifies one’s territory of intimacy and solidarity” (Erikson, 1968, p. 136). The emergent strength from this stage is love, “that mutuality of mature devotion that promises to resolve the antagonisms inherent in divided function” (Erikson & Erikson, 1997, p. 71).

Generativity vs. Stagnation: Care. The primary task of the seventh stage is generativity, defined by Erikson as “the concern for establishing and guiding the next generation” (Erikson, 1968, p. 138). The drive toward generativity is often expressed in parenthood, the result of the intimacy and commitments made during the previous stage.

During the fifth stage (identity), young adults develop a sense of who they are; in the sixth stage (intimacy) they establish long-term bonds of intimacy through marriage or friendships. At that point they are ready to make a commitment to society as a whole in the sense of continuing that society through its next generation. (Bee & Bjorklund, 2000, p. 37)

For those who do not become parents, generativity may be expressed in other forms of altruistic concern and creativity. “Generativity . . . encompasses *procreativity*, *productivity*, and *creativity*, and thus the generation of new beings as well as of new products and new ideas, including a kind of self-generation concerned with further identity development” (Erikson & Erikson, 1997, p. 67). McAdams and de St. Aubin (1992) define generativity as the time usually associated with middle adulthood when

“the adult nurtures, teaches, leads, and promotes the next generation while generating life products and outcomes that benefit the social system and promote its continuity from one generation to the next” (p. 1003). Generativity may find expression in such actions as mentoring younger colleagues, passing on one’s knowledge through teaching children or younger associates, or working for charitable organizations and causes (Bee & Bjorklund, 2000). The emerging strength of this stage is care, both of and about others.

The healthy adult personality is interdependent with the younger generation because it needs to behave in generative ways in order to progress through the life stage cycle.

The fashionable insistency of dramatizing the dependence of children on adults often blinds us to the dependence of the older generation on the younger one. Mature man needs to be needed, and maturity needs guidance as well as encouragement from what has been produced and must be taken care of. (Erikson, 1963, pp. 266-267)

Reflecting on the longitudinal Harvard University Study of Adult Development following 824 people into their older years, Vaillant states forthrightly, “Generativity provided the underpinning of successful old age” (2002, p.113).

The antithesis of generativity is stagnation. Inability to act in ways that care for that and those which come behind can result in pathological focus on the self, described by Erikson (1963, 1968, 1980) as a self-love that resembles parenting of one’s own self.

Integrity vs. Despair: Wisdom. The passing of the torch to the next generation ushers in the eighth and final stage described in Erikson’s developmental theory. Erikson (1968) states, “In the aging person who has taken care of things and people and has adapted himself to the triumphs and disappointments of being, by necessity, the

originator of others and the generator of things and ideas—only in him the fruit of the seven stages gradually ripens” (p. 139). The integrity of old age is described by Erikson in terms of its attributes.

It is the ego’s accrued assurance of its proclivity for order and meaning—an emotional integration faithful to the image-bearers of the past and ready to take, and eventually to renounce, leadership in the present. It is the acceptance of one’s one and only life cycle and of the people who have become significant to it as something that had to be and that, by necessity, permitted of no substitutions. It thus means a new and different love of one’s parents, free of the wish that they should have been different, and an acceptance of the fact that one’s life is one’s own responsibility. It is a sense of comradeship with men and women of distant times and of different pursuits who have created orders and objects and sayings conveying human dignity and love. (Erikson, 1968, p. 139)

The acceptance and affirmation of one’s life and the consciousness of one’s place in the community of humankind that transcends time and place yield wisdom as its final strength. For those who cannot come to this resolution, despair becomes the prominent trait of the stage. The person who cannot come to terms with the circumstances and choices of his/her life feels regret for the roads not taken or resentful of the opportunities lost or not available. There is no sense that the life one has lived has been fulfilling. Time is too short and there is despair over what was not and will never be. “Despair is often hidden behind a show of disgust, a misanthropy, or a chronic contemptuous displeasure with particular institutions and particular people—a disgust and a displeasure which . . . only signify the individual’s contempt of himself” (Erikson, 1980, p. 105).

Erikson, in his later reflections on the life cycle as he became aged, had a less idealistic view of the last stage of the life cycle. Bee and Bjorklund (2000) observe that Erikson’s optimistic view of the end of the life cycle was written when he was middle

aged. In his seventh and eighth decades, he saw the sense of loss that resulted from the increasing limitations posed by age. “The sense of physical limitation, of loss, contributes often to an increased self-centeredness, a quality that is in sharp contrast to the universalism or altruism that Erikson emphasized in his earlier writings on this final stage” (Bee & Bjorklund, 2000, p. 39). In the 1997 extended version of *The Life Cycle Completed*, chapters were added by Erikson’s wife, Joan Erikson, in which she described a ninth stage. Her writings were based upon her husband’s notations made in the first edition of the book and his thinking as he moved into his nineties. She noted that the first eight stages were described with the syntonic quotient mentioned first and the dystonic second; however, as she wrote about the ninth stage, she titled each stage with the dystonic preceding the syntonic (Basic Mistrust vs. Trust, for example), emphasizing that the most dominant force in this stage is toward decline and death. The description of the ninth stage is a recounting of each of the previous eight stages as the basic strengths that have accrued during the life cycle now are lost as physical and mental capacities atrophy with advanced aging and the approach of death. The self-centered child-likeness that may come at the end of life is the unraveling of the personality strengths emerging from the work of the previous eight stages (Erikson & Erikson, 1997). It can also be observed that the ninth stage is characterized by loss of social roles and one’s ability to meet social expectations or to have positively-identified meanings to one’s culture.

Levinson

Daniel Levinson was concerned that a more complete understanding of the development of the adult years was needed, and so he assembled a team of research

colleagues and undertook two studies, one of men and the second of women. His decision was that the initial study would focus on men, largely because he had a personal interest in his own developmental processes. *The Seasons of a Man's Life* (1978) reports the results of a study of 40 men between the ages of 35 and 45 in four occupational groups. A second study of women was planned from the outset and culminated in the writing of *The Seasons of a Woman's Life* (Levinson, 1996). The study of women was completed based upon a study sample of 45 women in three occupational groups. As in the first study on men, Levinson focused on the life course and development of the period between the late teens to the mid-forties.

Like Erikson, Levinson believed that, "In creating a deeper and more complex view of adulthood, one has to consider both the nature of the person and the nature of society" (1978, p. 5). Levinson also chose to describe his theory as a *life cycle theory* because that term "suggests that the life course has a particular character and follows a basic sequence" (1978, p. 6).

To speak of a general, human life cycle is to propose that the journey from birth to old age follows an underlying, universal pattern on which there are endless cultural and individual variations. . . . Second, there is the idea of seasons: a series of periods or stages within the life cycle. The process is not a simple, continuous, unchanging flow. There are qualitatively different seasons, each having its own distinctive character. (Levinson, 1978, p. 6)

Levinson's life cycle is conceptualized according to *eras* composed of *developmental periods*. Eras are the macro-structures of the life cycle; they encompass aspects of biological, psychological, and social development. Four eras are described in the life cycle: childhood and adolescence, early adulthood, middle adulthood, and late

adulthood. Each of these eras contains developmental periods, and each is bounded by a *transition period*. These cross-era transition periods serve to link the eras and provide continuity between the eras. The transition periods usually covers four to five years.

Levinson further explains the developmental periods as follows:

In *The Seasons of a Man's Life* I presented my own initial map of the developmental periods in men's lives over the course of early and middle adulthood from roughly 17 to 65. These periods are *not* periods in a single aspect of living such as personality, cognitive, moral, or career development. They are, rather, periods in the development of the adult *life structure*—the underlying pattern or design of a person's life at a given time. The life structure of a man, I found, evolves through a sequence of alternating periods, each lasting some five to seven years. A period of building and maintaining a life structure is followed by a transitional period in which we terminate the existing structure and move toward a new one that will fully emerge in the ensuing structure building-maintaining period. (Levinson, 1996, p. 6)

The extent to which one is successful in building a satisfactory life structure can be measured by its viability in the social world and its compatibility with the inner self. Within a life structure, a man must be “able to adapt, to maintain his various roles, and to receive sufficient rewards. A structure may be externally viable and yet not internally suitable if it does not allow him to live out crucially important aspects of his self” (Levinson, 1978, p. 54).

Childhood and Adolescence to Age 17 Years

Early Adulthood

Early Adult Transition--Age 17-22 Years
Entering the Adult World—Age 22 to 28 Years
Age 30 Transition--Age 28-33 Years
Settling Down—Age 33-40 Years

Middle Adulthood

Mid-Life Transition—Age 40-45 Years
Entering Middle Adulthood—Age 45-50 Years
Age 50 Transition—Age 50-55 Years
Culmination of Middle Adulthood—Age 55-60 Years

Late Adulthood

Late Adult Transition—Age 60-65 Years

Figure 1. Males' early and middle adult years development, indicating characteristic themes, transitions, and age ranges, according to Levinson. Adapted from Levinson, 1978, p. 57.

In *The Season's of a Man's Life*, Levinson (1978) laid out the central concepts of his theory of adult development and the evolution of a life structure; and his language in that book made it clear that he did not assume that his research findings would be the same for women's lives. Hence, Levinson, in that work, carefully described his results and insights in terms of a *man's life* or of *men's lives*. One of the four key questions of Levinson's study of women's life cycles in *The Seasons of a Woman's Life* (1996) was whether there is a human life cycle common to men and women. Through his study, Levinson did come to the conclusion that the life structures of men and women are the

same and that the timing of the periods is the same, though there are gender-related differences in how men and women proceed through the periods.

Levinson's developmental theory describes the developmental process as one of *individuation*.

In successive periods of development, as this process goes on, the person forms a clearer boundary between self and world. He forms a stronger sense of who he is and what he wants, and a more realistic, sophisticated view of the world: what it is like, what it offers him and demands from him. (Levinson, 1978, p. 195)

Through the process of individuation, paradoxically, while one is becoming more autonomous and self-defining, one is also able to attach more significantly to the external world—to take on more responsibilities in the form of adult social roles (Levinson, 1978). The individuation process is most apparent in the transition periods where eras are ending and beginning and the infrastructure for one's life is being rebuilt. "It prepares the inner ground, laying an internal basis on which the past can be partially given up and the future begun" (Levinson, 1978, p. 195). The process of individuation also involves resolution of four polarities Levinson believes are fundamental in the life cycle: Young/Old, Destruction/Creation, Masculine/Feminine, Engagement/Separateness. While presented as polarities, in fact both qualities exist in a person at all times; it is achieving a satisfying balance between these opposites that is the challenge. "We can work on these polarities at any time during the life course. During the transitional periods, however, both the opportunity and the need to attain greater integration are strongest" (Levinson, 1996, p. 33).

Each developmental period has its own developmental tasks. Integration of the four polarities forms the basis for the developmental tasks of the transition periods. The developmental tasks of a transition period are “to review and evaluate the past; to decide which aspects of the past to keep and which to reject; and to consider one’s wishes and possibilities for the future” (Levinson 1978, p. 51). During a stable period, the developmental task is “to build a life structure: a man must make certain key choices, form a structure around them, and pursue his goals and values within this structure” (Levinson, 1978, p. 49).

The *developmental tasks* are crucial to the evolution of the periods. The specific character of a period derives from the nature of its tasks. A period begins when its major tasks become predominant in a man’s life. A period ends when its tasks lose their primacy and new tasks emerge to initiate a new period. (Levinson, 1978, p. 53)

The first periods of the Early Adulthood era (approximately age 17-40 years) are the periods most relevant to the Daughter/Son adult social role. Levinson’s descriptions of other periods do not address developmental tasks relevant to this social role. However, the developmental tasks of the Early Adult Transition (age 17 to 22 years) center around the child/parent relationship because the primary developmental tasks involve separating from the family of origin and forming an initial adult identity. Separating includes both internal and external separation, as autonomy and independence both in the social and physical worlds are asserted and psychological distancing and emotional independence from parents emerges. “It is necessary to modify existing relationships with important persons and institutions, and to modify the self that formed in pre-adulthood. Numerous separations, losses and transformations are required” (Levinson, 1978, p. 73). At the

same time, the young person must begin to move into the adult world, “to explore its possibilities, to imagine oneself as a participant in it, to make and test some tentative choices before fully entering it” (Levinson, 1978, p. 73).

During the years from ages 22 to 28, the Entering the Adult World period, the primary task is to create an initial life structure that adequately links the valued aspects of self from youth to the adult world. “A young man must shift the center of gravity of his life; no longer a child in his family of origin, he must become a novice adult with a home base of his own” (Levinson, 1978, p. 557). It is a time to test choices involving career, love, family, and peers.

The young man has two primary yet antithetical tasks: (a) He needs to explore the possibilities for adult living: to keep his options open, avoid strong commitments and maximize the alternatives. This task is reflected in a sense of adventure and wonderment, a wish to seek out all the treasures of the new world he is entering. (b) The contrasting task is to *create a stable life structure*: become more responsible and “make something of my life.” (Levinson, 1978, p. 58)

In addition to the general tasks of creating a satisfactory initial life structure, women’s choices are overlaid with the internal images of the traditional woman’s role as caregiver and homemaker and the anti-traditional image that beckons toward independence and active engagement with the world as her own person.

A woman must take a further step in her relationship to marriage, motherhood, family of origin, occupation, the wider community. She often has the illusion—so common at the start of every structure-building period—that if she just makes the right choices and forms the right relationships, she can create a satisfactory life pattern that will last forever after. (Levinson, 1996, p. 97)
Levinson makes minimal mention of social roles in his description of his theory.

For Levinson, social roles are one aspect of one’s external relationships. The beginning is the overall life structure and personality, however.

A man's life has many components: his occupation, his love relationships, his marriage and family, his relationship to himself, his use of solitude, his roles in various social contexts—all the relationships with individuals, groups and institutions that have significance for him. His personality influences and is influenced by his involvement in each of them. We must start, however, with the overall life structure. Once the character of the individual's life has been identified, we can study in more detail the changes occurring in personality, in the marital and occupational careers, and in other components of life. (Levinson, 1978, p. 41)

Developmental tasks are not specific behaviors growing out of social role enactment, but are the larger internal processes of meaning making and life-structure creation within which social roles are only component parts. Adult social roles, while important manifestations of choices made in an individual life, are secondary order concepts for understanding human development for Levinson.

Havighurst's Studies of Social Roles and Developmental Tasks

A developmental theorist who has been particularly of importance to adult education is Havighurst. He conceptualized development as a sequence of developmental tasks that were, in turn, linked in adulthood to social roles.

“Whereas the developmental tasks of youth tend to be the products primarily of physiological and mental maturation, those of the adult years are the products primarily of the evolution of social roles” (Knowles, 1980, p. 51). Havighurst believed that meeting the challenges of these developmental tasks created a “teachable moment,” a period of time when there is an increased need and desire for education. “The requirements for performing each of these social roles change according to Havighurst, as we move through the three phases of adult life, thereby setting up changing developmental tasks and, therefore, changing readiness to learn” (Knowles, 1980, p. 51).

For the adult educator, knowing the nature of the developmental tasks and the culturally approved behaviors for meeting those challenges is important information for developing educational programs for adults.

Havighurst recognized Erikson's work on the life cycle but believed the life cycle was best expressed in terms of *dominant concerns*, which he believed govern a person's behavior during particular life cycle phases. He also believed that the phases were best expressed in decades. His scheme of dominant concerns is presented by decades.

- | | | |
|-------|----|---|
| 0-10 | 1. | Coming into independent existence |
| 10-20 | 2. | Becoming a person in one's life |
| 20-30 | 3. | Focusing one's life |
| 30-40 | 4. | Collecting one's energies |
| 40-50 | 5. | Exerting and asserting oneself |
| 50-60 | 6. | Maintaining position and changing roles |
| 60-70 | 7. | Deciding whether to disengage and how |
| 70-80 | 8. | Making the most of disengagement. |
- (Havighurst, 1963, p. 25)

Havighurst's research in the Prairie City Study (Havighurst & Albrecht, 1953), the Kansas City Study of Adult Life (Havighurst, 1955; Havighurst, 1957; Havighurst & Orr, 1956), and the Cross-National Studies (Havighurst & Neugarten, 1969) provided data on adult developmental tasks and social roles in the mid-twentieth century. In these studies, he identified developmental tasks associated with the adult years, identified social roles of adult life at that time, and developed a research design utilizing an Interview Protocol that could be adapted to other situations. This study relied heavily on the foundational work of Havighurst in its conceptual framework and methods.

Prairie City Study

In 1953 Havighurst and Albrecht published the results of the first of Havighurst's

studies on adult social roles. It was a three-part study conducted in a small mid-western city identified in the study simply as *Prairie City*. The purpose of the study was to research the activities of persons ages 50, 60, and 70 years with regard to the social roles in which they were engaged. More specifically, Havighurst and Albrecht sought to identify the community's perception of age-appropriate behaviors within each social role, the actual performance behaviors of adults in these social roles, and the personal adjustment of those performing at a variety of levels in the identified social roles. The purpose was to determine how people's involvement in various social roles changes with age and how the community views these changes in role performance in terms of social approval or disapproval.

The initial work was to identify the community's perception of age-appropriate social role performance behaviors in order to determine those behaviors approved by the community for older adults and those not approved. Questionnaires were administered to 1365 adults in 1949 and 1951. On the questionnaire, respondents were asked to rate descriptions of 96 activities in which older people might be involved, indicating if they approved of older persons engaging in that activity, if they saw it as neither good or bad, or if they if they saw the activity as a bad or foolish thing for an older person to do (Havighurst & Albrecht, 1953). Based upon the findings from this research, they were able to identify those activities viewed with strong approval, mild approval, indifference or mild disapproval, or strong disapproval. The overall finding was that "a certain degree of tapering-off is desired, a noticeable slowing down, but not too much of it" (Havighurst & Albrecht, 1953, p. 36). Furthermore, they found that older people were more

restrictive in their opinions about an appropriate level of activity for older persons than were younger respondents.

Concluding from this public opinion study we should say that the American society desires and expects a good deal of activity and independence from its older people, tolerates a wide variety of roles on their part, and wishes them to slow down gradually as they grow older. (Havighurst & Albrecht, 1953, p. 37)

The next stage of the study was administering an interview schedule to a cross sectional, representative sample of 100 Prairie City citizens over age 65 years.

We decided to look at the roles filled by the older people in Prairie City, to describe them and see how they varied between men and women, between the married and unmarried, between those well along in years and those who are comparatively “young,” as well as between those in the different socioeconomic classes. (Havighurst & Albrecht, 1953, p. 43)

Havighurst and Albrecht identified 13 social roles in which older adults might have an opportunity to be engaged. Those were:

Parent

Grandparent

Great-grandparent

Home-maker

Member of extended family or kinship group

Social club member

Business club member

Church member

Age or peer-group member

Member of clique or informal social group

Citizen

Worker or money-earner

User of leisure time.

Havighurst and Albrecht did not include the Daughter/Son social role in the Prairie City study, though their demographic questionnaire did inquire if the respondent had a living parent. They did, however, gather data on the parent role, and since the Daughter/Son role is a reciprocal role with the parent role, it is possible to infer some aspects of the Daughter/Son role from those data. For example, according to the answers provided by the respondents (who were responding as parents), there is information about the dependence/independence relationship between parents and their adult children; for example, the study found that 80% of fathers and 70% of mothers described the relationships with their children as ones of mutual independence. Mutual dependence was claimed by 3% of fathers and 12% of mothers. Dependent fathers made up 3% of the sample, and 9% of mothers were dependent upon their children. A few parents were still responsible for children (6% of fathers and 9% of mothers), but in most of these cases it was because unusual situations had left older parents with young children still at home (e.g., an adopted child, fathers who had married younger women who then had children). In only one case was the dependent child an adult, and that child was disabled. Of the fathers, 8% had no contact with their children, but all mothers were in contact with their children.

The most common role is that of mutual independence of parents and children, with strong affectional ties and much friendly visiting or even dwelling under the same

roof. Parents and children in this role made their major decisions independently. Neither was subordinate to the other (Havighurst & Albrecht, 1953).

The Prairie City Study also found that those most active in family relationships showed higher personal adjustment scores than average. It also found that those who are married and living with a spouse had much higher personal adjustment scores than did the widowed or single respondents. They also found that those with high activity levels in one role area tended to be highly active in other social roles; women tended to rate higher than men. Married persons living with spouses had the highest activity scores across all social roles. The research also identified a gradual decrease in overall role activity with age. The more important variable in determining role activity levels was socioeconomic status, with higher SES groups achieving higher activity scores than the lower groups.

Based on the Prairie City Study, Havighurst and Albrecht concluded that the American culture expects and approves of some slow down of social role activities to begin about age 60 years and that individuals will begin to assume social roles appropriate to that age then. By age 70 years, the community expects the individual to play a distinctly different *elder* role.

The third phase of the study involved combining the information from the survey of community attitudes about age-appropriate social role performance with the actual social role performance ratings for the 100 respondents to derive individual social approval ratings for each of the individual respondents. The social approval rating score for any given individual person may be inaccurate since the way in which an actual

person is regarded by the community is more than a summary of social role approvals (personality can be a strong influence, for example); nevertheless, across a group of people, important information can be gleaned. Havighurst and Albrecht found that gender appeared to influence approval scores because, on the whole, women fill roles that have small but consistently higher approval ratings. Likewise, those married, living with a spouse, had higher approval rating scores than those who did not have a living spouse or were not married. Higher social status also resulted in higher social approval ratings, though the researchers were aware that there might be a built-in middle and upper class bias in the premises underlying the development of the social approval ratings. Even with the differences found, there were not large differences in social approval ratings, with the exception of those widely separated in SES. “It appears that many people of any age, either sex, any marital and any socioeconomic status, do find roles that are at least mildly approved by the community, while other people in these same categories do not” (Havighurst & Albrecht, 1953, p. 374).

Kansas City Study of Adult Life.

Havighurst’s study most important for this study is the one conducted between 1952 and 1955 as a part of The Kansas City Study of Adult Life (Havighurst, 1955; Havighurst, 1957; Havighurst & Orr, 1956). The study was conducted by the Committee on Human Development of the University of Chicago and a Kansas City social agency, Community Studies, Inc. Havighurst’s Kansas City Study was intended to assist adult educators in understanding adult life in the mid-twentieth century. “The goal of adult education is to help people live better. What does ‘living better’ mean, and how can

education help people to do it?” (Havighurst & Orr, 1956, p. 1). The purpose of the study was further described:

To get one kind of answer to these questions we have gone to a group of people and asked them to tell us what their daily life consists of and what seems important to them. We have scrutinized their answers in the light of what the social philosophers have said concerning the good life in America, and on this basis we have made some judgments concerning the degree of success which the various people whom we have studied are achieving in their adult years. (Havighurst & Orr, 1956, p. 1)

The study aimed at surveying and recording quantitatively as much as possible of the social lives of a sample of American adults aged 40 to 70. The term “social life” is used broadly to cover what is sometimes called “way of life” or “life style.” The purpose of securing a quantitative record was to make possible the comparison of way of life with other characteristics of a person, such as age, sex, personal adjustment, and socio-economic status, in the hope of making some generalizations concerning middle age and aging in America. (Havighurst, 1957, p. 301)

In addition to identifying what these people were doing in their lives, the concept of competence was also introduced. In order to determine to what extent people were meeting the societal expectations for performance of socially desirable and desired behaviors, value judgments were made about behaviors that indicated more successful living patterns (high performance). Havighurst was aware of the difficulties presented by making such judgments about social phenomena that can vary substantially among sub-groups within American culture, and he asked, “How can the social role concept be used in the study of social competence in such a complex, pluralistic society?” (1957, p. 304).

He felt the answer was in the design method of the study, which was one that sought general definitions of common social roles.

This procedure assumes that a general culture with its expectations of behavior in the common social roles exists in a modern democratic society. The rating scales for role performance then consist of the *culture-wide* definitions of success and failure in these roles, and omit the particular variants on the general themes which are characteristic of one or another sub-group.

This procedure is certainly feasible in America, where mass communication has spread widely the general expectation of what makes a good parent, worker, friend, citizen, church member, etc. The very high degree of geographical and social mobility of Americans tends to favor this procedure. (Havighurst, 1957, p. 305)

The sample for the Kansas City Study began by drawing an area probability sample comprised of approximately 6,000 households. A short interview was conducted at each household to determine basic demographic data of the household members aged 40-69 years, and then the persons in that group were placed in one of four economic groups (upper and upper middle, lower middle, upper lower, and lower lower). From these four groups, a random sample was drawn that included equal numbers from each economic group and was comprised equally of males and females, resulting in a stratified random sample. Interviewees were chosen randomly from the lists until a sufficient number of interviews had been conducted (Havighurst, 1957). A proportionate number of Mexicans, African-Americans, and persons of Asian descent were included in the sample. Of those selected in the sample, 53% were interviewed. The reasons for nonparticipation were refusal to be interviewed, moving, death, inability to locate, and

other undocumented reasons. Ultimately, the Kansas City Study was based upon interviews with 234 people (110 men and 124 women) from Kansas City and its environs; a small sample of 25-30 year olds was also included as a supplementary study.

In interviews lasting about two hours, the respondents were asked about a variety of aspects of their lives. “The interview was devised to get information on *what* the person did in the performance of his various social roles, how much energy he invested in these roles, and *how he felt* about himself in his various roles” (Havighurst, 1957, p. 306). Interviews were conducted by 12 different persons, eight females and four males. All were white initially until it was noticed that African-Americans were refusing to be interviewed; when an African-American woman was added to the interviewer group, she was successful at obtaining the cooperation from that population.

After the interviews were completed, two raters, one male and one female, ranked each respondent on Performance Rating Scales for nine social roles. Havighurst (1957) described the conceptual framework for constructing the rating scales:

The following general criteria were employed in devising the scales. (a) Energy input in a role was a major factor. A person who spent a great deal of time and energy in a role was generally given a fairly high score, but not necessarily the highest. (b) Quality of performance was also a factor. Whenever it seemed that there was general agreement on what makes "good" performance, the quality criterion was used together with the energy criterion. Nobody was given either of the top two scores, 8 or 9, unless he combined a high energy input with a “flair” for the role. . . . Another aspect of behavior used in rating role-performance was attitude toward the role as reported by the individual. To get the highest ratings, a person must indicate that he found the role personally rewarding, whereas a person who showed that he disliked a given role was rated lower than otherwise on this account. (pp. 306-307)

With regard to the Performance Rating Scales, Havighurst summarized: “the meaning of competence in the performance of social roles, in this study, includes the level of overt performance judged against common American standards combined with attitude toward the role as disclosed in an interview” (1957, p. 308). Nine adult social roles were included in the Kansas City Study. Those were:

Worker

Parent

Spouse

Homemaker

User of Leisure Time

Friend

Citizen

Club or Association Member

Church Member.

The final score for each respondent on each role was the mean of the two scores for that role. Data were analyzed for the four socio-economic groups, for three age groups (41-50 years of age, 51-60 years of age, and 61-70 years of age), and for men and women. Generally, it can be said that socio-economic differences were the most prevalent differences in social role performance, and the difference indicated higher social role performance in higher socio-economic groups. “It is also evident that performance is closely related to socio-economic status in most role areas, but not to age” (Havighurst, 1957, p. 317). Havighurst also speculated that “the differences in role-

performance [*sic*] scores between the various role-areas as due mainly to differences in degree of self-expectation or internalization of the several roles “ (1957, p. 319).

The Kansas City Study has some specific relevance for the Daughter/Son adult social role, the subject of this study; but it presents some challenges for understanding the treatment of the Daughter/Son role within the context of that research. Havighurst wrote about the Kansas City Study in the publication *Adult Education and Adult Needs* (Havighurst & Orr, 1956). The focus of that work was on *developmental tasks*, which were defined as “the *basic tasks of living*, which must be achieved if we are to live successfully and to go on with a good promise of success to the later states of life” (Havighurst & Orr, 1956, p. 7). Ten areas of human behavior that impinge on adult behavior were listed, and from these 11 developmental tasks of middle age were specified.

1. Setting adolescent children free and helping them to become happy and responsible adults.
*As aunt or uncle, serving as model and, on occasion, as parent-substitute for nephews and nieces.
2. Discovering new satisfactions in relations with one’s spouse.
*Working out an intimate relationship with brothers and sisters.
3. Working out an affectionate but independent relationship with aging parents.
4. Creating a beautiful and comfortable home.
5. Reaching the peak in one’s work career.
6. Achieving mature social and civic responsibility.
7. Accepting and adjusting to the physiological changes of middle age.
8. Making an art of friendship.
9. Making a satisfying and creative use of leisure time.
10. Becoming or maintaining oneself as an active club or organization member.
11. Becoming or maintaining oneself as an active church member.
*Roles which unmarried people may perform more fully than the average person, as a partial substitution for the roles of parents and spouse.
(Havighurst & Orr, 1956, p. 9)

The third developmental task is of particular interest to this study, and the nature of this task was described:

People at 45 to 60 generally have parents who are beginning to show and to feel their age. At this point it becomes desirable for adult children and aging parents to reorganize their relationships. The adult children must find ways of maintaining an affectionate and friendly but neither dependent nor dominant relation. And eventually, if the aging parents lost their health or their grasp of the world, the adult children will have to take some responsibility for them. This task requires a delicate touch, an ability to be objective, a basic love of one's parents. (Havighurst & Orr, 1956, pp. 15-16)

Mean scores for performance on developmental tasks were calculated by age, gender, and social class. See Table 2 for the mean performance scores for each cell.

Table 2

Child of Aging Parents Performance Scores of Kansas City Adults on the Developmental Tasks of Middle Age by Gender and Social Class

Men Age 40-70 Social Class				Women Age 40-70 Social Class			
I	II	III	IV	I	II	III	IV
<i>M</i>	<i>M</i>	<i>M</i>	<i>M</i>	<i>M</i>	<i>M</i>	<i>M</i>	<i>M</i>
5.89	6.06	5.89	5.00	5.75	5.90	5.94	5.75

Note. Data for this table was obtained from Havighurst & Orr, 1956, p. 32. Scores ranged from 0 to 9.

That the Child of Aging Parent role was one that the research team anticipated including is further evidenced by the inclusion of questions in the interview questionnaire about the respondent's parents. The seven questions were:

14. Are your parents living now? How old are they now?

Mother _____

Father _____

15. If one or both are living ask, Where do they (does he, she) live now? ____

16. How are they getting along? _____

Do you have much responsibility for them? _____

17. (If one or both are dead, ask) How long ago did your mother pass away?

18. How old was she then? _____

19. How long ago did your father pass away? _____

20. How old was he then? _____

(Havighurst, 1957, p. 361)

More directly, Havighurst developed a Performance Rating Scale for the Adult Child of Aging Parent social role, and described it in the *Research Memorandum on Social Adjustment in Adulthood and Later Maturity* (1955). Havighurst stated, "This is a set of rating scales for measuring performance in the major role-areas of adult life. The scales are presented at the end of this paper in the form in which they are now being used in the Kansas City Study of Adult Life" (1955, p. 1).

The Social Competence of Middle-Aged People is Havighurst's most thorough discussion of the social role performance study portion of the Kansas City Study of Adult Social Life. Nevertheless, by the time of its publication in 1957, only nine social roles were included; the Performance Rating Scale of the *adult child of aging parents* was not

included in the report. Furthermore, Havighurst offered no discussion of the reason that the role was omitted in the final analyses.

Cross-National Studies.

The third of Havighurst's major studies on social roles was a cross-national study based upon The Kansas City Study of Adult Life. This study was intended as a preparatory study of three to four years, in anticipation of a larger, more comprehensive study. The preliminary study had two purposes. The first was to generate hypotheses about successful aging that could later be tested in larger, more representative samples in a variety of cultural settings. Secondly, it was to be a trial of a research design for comparable studies involving samples from different cultures. In introducing the study, Havighurst and Neugarten (1969) wrote:

One of the principal unanswered questions about the human life cycle in modern societies is how people structure their lives after about age 65 when they retire from or lose some of the roles of middle age. What is the nature of their experience, how do they pattern their interpersonal relations, and under what conditions do they achieve life satisfaction? (p. 3)

The larger research was also to study two different views of the aging process. Disengagement theory anticipated that maximum social adjustment grows from the mutual withdrawal from each other of the aging person and society. This psychological withdrawal from social interactions is a sign of psychological well-being, according to disengagement theory. On the other hand, the Kansas City Study's data indicated the opposite to be true: "life satisfaction is *positively* related to social interaction or activity in older persons, rather than to disengagement" (Havighurst & Neugarten, 1969, p. 138).

An international research team was assembled to prepare interview schedules for administration in six major urban areas: Vienna, Austria; Milano, Italy; Bonn-Ruhr, Germany; Nijmegen, Holland; Warsaw, Poland; and Chicago, U. S. A. It was decided to draw samples from two occupational groups that would be common to each area. Thus, samples of 25 retired male school teachers and 25 male steelworkers were identified in each of the six locations. Though the Kansas City Study was the foundation for the interview schedule and rating scales, great effort was spent in creating interview schedules and rating scales in six languages that would yield comparable data. Scoring was completed using the same procedures used in the Kansas City Study. The process of considering the cross-national aspects of the study also led to the addition of two social roles not included in the Kansas City Study. The cross-national study was based upon 12 social roles: Worker, Parent, Grandparent, Kin, Spouse, Home-maker, Club member, Civic and Political Participant, Friend, Neighbor, Church Member, Acquaintance or Informal Group Member.

A social role not reported in this study was the Daughter/Son role. The interview schedule does have a section titled *child of aging parent* among the questions for other social roles (Havighurst et al., 1969, p. 170) and the social role rating scale has a rating scale provided for *child of aged parent* (Havighurst et al., 1969, p. 176). Information on this role was not a part of the final study report, however.

The Interview Protocol for the study included the following questions regarding the social role *child of aging parent*:

Is your father or mother still living? (Check to see whether or not death has occurred within the last ten years.)

How about your wife's father or mother?

(Probe for activity and involvement and for financial support. Probe also for change in last ten years, and affect regarding change).

(Havighurst et al., 1969, p. 170)

The international research team also developed a Performance Rating Scale for the role. Instructions and rating values were provided. In the instructions, "R" refers to the respondent. The text regarding that role reads:

This role includes interaction both with R's own parents and with his wife's parents (mother-in-law and father-in-law). When parent is no longer living, rate '0'.

As in PARENT and GRANDPARENT ratings, the principal basis for rating in this role is the frequency and regularity of contact. However, to this there must be added two other dimensions of interaction:

- a Effort given in sustaining parent(s) financially. This does not necessarily mean that regular visits are made. R may support his parents fully, partially, or not at all.
- b Effort made helping the parent in household matters and/or illness. R may take complete care of parents and/or help regularly in matters of housekeeping; he may do this occasionally; or he may not give such help at all.

It is assumed that if R is active in (a) or (b), he will be in regular, somewhat frequent contact with his parents. Thus the rating scale for this role is as follows:

- 0-- no contact at all with parents
- 2-- little, irregular personal contact; or irregular contact by phone or letters
- 4-- infrequent but regular contacts; sees or communicates with parent at least once a month
- 6-- regular contacts at least weekly with parents; OR
some financial assistance to parent but infrequent contact; OR
some help given parents in housekeeping or personal care, but infrequent interaction
- 8-- daily contacts or communication with parent, or varied contacts per week with activities planned together: OR
R assumes full financial responsibility for parent, though he may not

communicate with parent daily; OR
R takes complete care of parent and/or helps regularly in matters of
housekeeping, though R may not communicate with parent daily.
(Havighurst et al., 1969, pp. 176-177)

No data were provided for this role. Since this was a pilot study with a small sample size and the age range was from 69 to 76 years of age, few respondents would be anticipated to be actively engaged in the *child of aging parent* social role. It was, therefore, predictable that no data were reported.

The results of this cross-national preliminary study found reliability on three of the five dimensions of performance included in the protocol and rating scale. The three dimensions were present level of activity, degree of satisfaction regarding present level of activity, and extent of ego-involvement in the role. Data were presented for these three dimensions. No data were given for change of activity level since about age 60 or affect concerning change of role-activity because the data were not considered reliable (Havighurst & Neugarten, 1969). Also, “. . . because the samples of respondents are small and are not truly representative of the national groups in question, conclusions regarding cross-national differences cannot be safely drawn (Havighurst & Neugarten, 1969, p. 13). They did conclude that the data in the report were sufficient for developing hypotheses regard the relationship between social setting and role satisfaction and life satisfaction in persons of the studied age group, though the sample was too small to test such hypotheses. In regard to the purpose of the study to develop a research design and methods that could be used for cross-national study of similar social phenomena, they reported that the goal had been accomplished. “More conclusive is the

fact that the cross-national research team succeeded in working out a set of field-work and analytical methods that are practicable where differences of language and culture are involved” (Havighurst & Neugarten, 1969, p. 16).

The University of South Florida Social Roles Research Project

The foundation of the University of South Florida Social Roles Research Project was laid by Abney’s (1992/1993) study that updated and revised Havighurst’s studies (1953, 1956, 1969) and content validated the contemporary social roles and associated developmental events. Abney’s research also investigated socioeconomic, gender, and age patterns. Developmental events were categorized into three phase levels: entry, intermediate, and advanced.

The study began with a listing of social roles and associated developmental events placed in phases adapted from Havighurst’s original studies (1953, 1957, 1959, 1969). Then, a pilot panel of experts from adult education, adult development, sociology, psychology, and gerontology were asked in a field test to a) respond to the initial listing of social roles, b) match developmental events with social roles, and c) identify levels of expertise or achievement required to accomplish the developmental event. As a result of the pilot panel responses, revisions were made to the questionnaire and procedures. The pilot panel next matched each developmental event to the appropriate social role; and revisions to the developmental events were made as a result. The final step in the field testing was for the pilot panel to categorize the revised developmental events into entry, intermediate, or advanced levels.

The next stage of research was the validation panel process in which 24 experts participated on the initial panel and 23 on the verification panel. Based upon the initial panel feedback, 13 social roles were accepted as contemporary adult social roles. In the next steps, the initial panel was asked to indicate strength of agreement with the phase placement of the developmental events; panel members were also given the opportunity to add, delete, or revise events and change the placement of the event.

A verification panel of experts undertook the same process of responding to the inclusion of each social role as a separate adult social role, matching developmental events to social role, and categorizing developmental events into phases. The results of the two panels regarding both social roles and developmental events were compared.

An agreement of 80% between the total scores of the two panels was established to indicate content validity of the social roles and developmental events for that role. An agreement between the two panels of 70% for an individual social role and a 60% for an individual developmental event was further established as evidence of content validity and for continuation in the study for both the individual roles and events. (p. 61)

A card-sort check completed by 10 adults familiar with the project provided a basis for final placement of developmental events in phases.

Based upon the results of the expert panel process, a community survey was developed from the social roles and developmental events identified in the process and was administered to 180 adults.

The purpose of the community survey was to investigate identifiable patterns in socioeconomic status, gender, and age across social roles and across developmental events within each role. . . . To accomplish the community survey purpose, the study respondents were asked to complete two tasks concerning the social roles and developmental events. The first task asked “How important on a scale of very important to very unimportant is each of the listed major adult social

roles?” In the second task, the respondents were asked to identify, from a list of developmental events within a specific social role, the activity(ies) or events that they performed in each role. (p. 63)

Two pilot tests of the survey were administered, first to 60 adults (30 males and 30 females in three age groupings (young, middle, and old) with similar characteristics to the study respondents. Minor changes were made to the demographic data collection form and to the instructions. The second pilot test was conducted with 15 adults responding to the revised version of the survey protocol.

The community survey was directly administered to 180 individuals comprising a nonprobability quota sample in the Tampa Bay, Florida, area. Respondents' ages ranged from 18 to over 65 years, were equally male and female, and reflected the 1990 ethnic composition of the study's metropolitan area. In order to include racial/ethnic minorities, minimum quotas were set for the quota sample (10% African-American, 7% Hispanic-American, 0.5% Native American, and 1% Asian-American). The quota sample was divided into an 18 cell design (three socioeconomic levels x male or female x three age categories). Survey respondents were selected based upon conformity to the demographic requirements for the category.

Abney

Abney's (1992/1993) research resulted in the identified and validated 13 adult social roles that have been the focus of the University of South Florida Social Roles Research Project. These roles are association/club member, citizen, Daughter/Son, friend, grandparent, home/services manager, kin/relative, learner, leisure time consumer,

parent, religious affiliate, spouse/partner, and worker. The study also identified and validated 94 developmental events associated with the 13 adult social roles.

With regard to the Daughter/Son social role, Abney found it to be one of the highest ranking roles. The initial panel members gave it a median rating of 3.9 for inclusion as an adult social role and an overall rank of 5.5, tied with the parent role for fourth and fifth place among the 13 identified social roles. The verification panel gave the Daughter/Son role a medial rating of 3.89, with a rank of 3.5, a tie in rank with the parent role for third and fourth place. The combined results of the initial and verification panels were a median rating of 3.90 and a rank of 3.5 of the 13 adult social roles.

The question the initial and verification panels responded to in evaluating the developmental events on a scale of strongly agree to strongly disagree was, AIs each developmental event placed in the appropriate phase for that social role? All the developmental events satisfied the established inclusion criteria by meeting or exceeding a 2.5 rating. (Abney, 1992/1993, p. 80)

Six developmental events for the Daughter/Son adult social role were identified for inclusion in the community survey. These were:

Establish independence from parents

Develop and/or refine adult relationship with parents

Handle increased demands of older parents

Deal with chronic illness, frailty, and/or death of parent

Handle increased emotional, physical and/or financial demands of older/aging parents

Successfully adapt adult relationship with parents to changing life situations.

(Abney, 1992/1993)

In both initial and verification panels, scores were separated by no more than a ranking of 2.0, with initial panel median scores ranging from 2.98 to 3.90 and verification panel rankings ranging from 3.67 to 4.0. Additionally, the initial panel rated four of the six developmental events in the agree category and two in the strongly agree category with regard to inclusion as a developmental events for the Daughter/Son social role. One hundred percent of the verification panel members agreed strongly that all six of the identified developmental events were appropriate developmental events for the Daughter/Son social role. From the multiple panel process, Abney developed a Community Survey to ascertain the perceived importance of the identified adult social roles and the associated developmental events. A quota sample population of 180 respondents evenly distributed among 18 cells (3 age variables x 2 gender variables x 3 SES category variables) and with ethnic diversity approximately representing that of the Tampa Bay, Florida, completed the survey.

The community survey found that, between respondents, there were no significant differences for the main effects of age, gender, and SES, nor were there any significant interactions. However, within respondents, there was a significant main effect for social roles and significant interactions between role and gender, role and age, as well as a three-way interaction between role and SES and age. With regard to the Daughter/Son social role, he found “the Daughter/Son role was the only role significant by SES alone” (Abney, 1992/1993, p. 119). The grand mean for Daughter/Son social role for all groups was 4.24, which was a rank of 3.5 among all social roles. It was the highest ranked role

for the young age group (mean = 4.63) and among the three lowest ranked roles for the older age group (mean = 3.67) (Abney, 1992/1993).

Respondents in the community survey were also asked to indicate which of the developmental events described for each social role were behaviors they performed. Analysis of results for the Daughter/Son social role found that, overall, 25% of developmental events were identified by the respondents. The range for the age variable was 41% for younger respondents to 9% for older respondents. Males identified 22% while females indicated 28%. SES results were 23% for working, and 26% for both lower middle and upper middle. Among the 13 social roles, the developmental event participation ranked ninth (Abney, 1992/1993, p. 128).

The event range was small in the Daughter/Son role with D1 (Deal with chronic illness, frailty, and/or death of parents) being the highest event with 34% circled by the respondents and D4 (Handle increased emotional, physical, and/or financial demands of older/aging parents) the lowest with 17%. The MANOVA shows that the events and events by age were significant on the Wilkes= Lambda. As expected with the age-relatedness of this role, the percentage of events circled decreased with age. The working older males and upper older females circled the lowest percentage of events while the working young females had the highest percentage circled. (Abney, 1992/1993, pp. 133-134)

Five developmental events emerged from Abney's (1992/1993) study. Abney adopted a coding convention for developmental events using a letter code for the role (D= Daughter/Son role) followed by a number for each separate developmental event within each social role. For the contemporary Daughter/Son adult social role, the five developmental events identified by Abney are reported in Table 3.

Table 3

Developmental Events for the Daughter/Son Adult Social Role

Code	Developmental Event
D1	Deal with chronic illness, frailty, and/or death of parents
D2	Redefine relationship with parents
D3	Establish independence from parents
D4	Handle increased demands of aging parents
D5	Adapt relationship with parents to changing situations

Note. Abney, 1992/1993

Abney also looked at the mean differences in the Daughter/Son role by SES level.

The means and rank order of the perceived importance of the Daughter/Son role are presented by cell in Table 4. Working Young Females (WYF) actually rated the importance of the role higher than any other group ($M = 4.7$). This was followed by means of 4.6 for the MYM and MYF cells.

McCoy

McCoy's (1993/1994) research extended Abney's study (1992/1993) to the disenfranchised and elite socioeconomic status (SES) levels and then aggregated his data with Abney's data on the working, middle, and upper middle socioeconomic levels. The research questions asked what profiles are identifiable for the disenfranchised and elite SES groups across perceived social roles and across developmental events within social roles. McCoy also investigated the profiles by age and gender, and then he compared the disenfranchised and elite groups with the Abney's (1992/1993) findings for the upper middle, middle, and the working SES levels. McCoy found the elite and disenfranchised SES levels had more disparity between them than other SES levels. He also found that,

across SES levels, the friend role was the most important and the association/club member and grandparent roles were the least important. His results also indicated that for four of the social roles (Daughter/Son, parent, grandparent, and worker), age was the important factor for determining developmental events.

With regard to the Daughter/Son social role, McCoy found that the disenfranchised ranked the Daughter/Son role ninth in order of importance while the elite ranked it fourth, for a combined ranking for these two SES groups of eighth. When combined with Abney's (1992/1993) findings, the ranking of the Daughter/Son social role for all five SES groups was fifth among the 13 social roles. The means and rank orders for the perceived importance of the social roles are presented in Table 5, which compares McCoy's (1993/1994) disenfranchised and elite means and rank order to the overall means of the five SES groups.

A repeated measures analysis of the developmental events for the Daughter/Son social role found significant differences ($p < .0001$) for between subject effects for age. Older adults reported participation rates significantly lower than were reported by young and middle aged respondents for two developmental events, D2 (redefine relationship with parents) and D5 (adapting to changes in life situation with parents). Analysis of within subjects effects for the Daughter/Son social role found significant differences for several groups.

Both middle-aged and young adults indicated significantly higher levels of participation than the older adults in D2 (develop or refine adult relationship with parents), D3 (establish independence from parents), D4 (handle increased demands of aging parents), and D5 (adapt relationship with parents to changing situations). (McCoy, 1993/1994, p. 118)

The conclusion of McCoy's (1993/1994) research made it possible to begin individual research projects on each of the 13 identified contemporary adult social roles. These projects developed Performance Rating Scales and Interview Protocols and content validated them. Quota samples largely in the Tampa Bay, Florida, area provided the subjects for the studies. Kirkman's (1994/1995) study initiated the development and content validation of Performance Rating Scale and Interview Protocol/assessment instrument phase of the University of South Florida Research Project.

Table 4

Means and Rank Order of Perceived Importance of the Daughter/Son Social Role by Cell

Respondent Cell	Mean	Rank
WYM	4.2	8
WYF	4.7	2
WMM	4.3	2
WMF	4.5	4
WOM	3.7	9
WOF	4.4	1
MYM	4.6	3
MYF	4.6	1
MMM	4.5	3
MMF	4.4	3
MOM	4.0	6
MOF	4.1	8

UYM	4.7	1
UYF	5.0	1
UMM	4.4	4
UMF	4.4	2
UOM	2.8	13
UOF	3.0	13

Note: SES Variable Age Variable Gender Variable
W=Working Y=Young M=Male
M=Middle U=Upper M=Middle O=Older F=Female
Abney, 1992/1993, p. 125

Table 5

Mean and Rank Order of Perceived Importance of Social Roles

Role	Disenfranchised		Elite		All SES Groups	
	Mean	Rank	Mean	Rank	Mean	Rank
Association/Club Member	2.08	13	3.40	12	3.05	13
Citizen	4.08	3	4.27	3	4.09	6
Daughter/Son	3.57	9	4.25	4	4.11	5
Friend	4.42	1	4.50	2	4.48	1
Grandparent	3.18	12	3.23	13	3.50	12
Home/Services Manager	4.22	2	3.70	11	3.97	8
Kin/Relative	4.07	4	4.17	7	4.19	3
Learner	4.02	5	4.23	5	4.16	4
Leisure Time Consumer	3.85	8	3.75	10	3.88	10
Parent	3.87	7	4.20	6	4.09	6
Religious Affiliate	3.90	6	3.83	9	3.74	11
Spouse/Partner	3.22	11	4.72	1	4.20	2
Worker	3.32	10	4.00	8	3.90	9

(McCoy, 1993/1994)

Kirkman

The first of the University of South Florida Research Group's studies on individual contemporary adult social roles was completed by Kirkman (1994/1995) with the development and content validation of Performance Rating Scales and Interview Protocols for three roles (parent, spouse/partner, and worker) for the middle three SES groups (working, middle, and upper middle). In this study, Kirkman established the fundamental research questions and developed a process for development of Performance Rating Scales and Interview Protocols that set the frameworks for all subsequent studies of other contemporary adult social roles in the University of South Florida Research Project, including this study of the Daughter/Son role.

For each of the three social roles, Performance Rating Scales based upon behaviors and skills appropriate for each performance level were developed from a literature review. "Each role had three scales drafted, one for each phase—entry, intermediate, and advanced. Scales were organized in five descriptive performance levels (low, below average, medium, above average, and high) with a two-point score associated with each level" (Kirkman, 1994/1995, p. 72). Kirkman chose to use the framework of phases rather than an age-based framework (young adult, middle-aged adult, and older adult) because she felt that such a construct provided more flexibility to acknowledge the diversity of life patterns present in contemporary adult life. For example, one may enter the parent social role at ages ranging from early young adult life. Social Roles research project adopted the original chronological construct of young adult, middle adult, and older adult as the basis for sample selection and data analysis.

The research process developed by Kirkman (1994/1995) was described as a nine-task procedure. Task 1 was to draft the Performance Rating Scales based upon a review of the literature and input from the USF research project group. Descriptions of behaviors and skills associated with five performance levels and phases for each role were created in order to allow for making judgments about social role performance. A panel of experts was asked to review the scales, and then later used a card-sort procedure placed the behavior/skill descriptors in the appropriate performance level. Task 2 further developed the scales by asking another group of experts to complete the same procedure. These panels, the initial scale panels, were presented with stacks of cards representing strands within the phase performance level and directed to place the cards in performance level categories. Panel members were also asked to provide input on the clarity of language and the completeness of the resulting descriptions for each role phase.

The validation of the Performance Rating Scales was accomplished in Task 3. A third panel group of experts “received a brief explanation of the project, scales for their specific role, and a request for rating of language clarity and completeness of description for each phase scale” (Kirkman, 1994/1995, p. 76). An opportunity was also provided for members to suggest changes for the Performance Rating Scales.

Task 4 was the creation of interview items for each phase of each of the three adult social roles. During Task 5, the item sets were reviewed by the research project group for suggestions and language clarity, paying attention to ambiguity and bias. Items were revised as appropriate. Task 6 involved Interview Verification Panels, which

critiqued the item sets for relevance, completeness, and representativeness of the sets relevant to the Performance Rating Scales from which they were constructed.

The interviews and Performance Rating Scales were field tested in Task 7. Interviewers and raters were trained to use the instruments prior to administering the interviews to a small population. Discussions about the interview items and the use of the scales resulted in further modifications of the Performance Rating Scales and interview item sets (Task 8). The final step (Task 9) of the process was the administering of the interview item sets to 90 individuals for each social role. The three quota samples were stratified with equal numbers of men and women ($n=45$), across three age groups ($n=30$), and across three socioeconomic groups ($n=30$). The disenfranchised and elite SES groups were not covered in this study, but were addressed in a later study by Davis (2002).

Data analysis for the parent role found that there was statistical significance for the main effect of age ($p < .02$) as well as for the interaction between age and gender ($p < .03$). Age by gender by SES also showed statistical significance ($p < .04$); however, Kirkman (1994/1995) concluded that the effect of gender strongly indicated “that there were no significant differences between males and females in parent role performance in the study” (p. 128). Using Tukey post hoc comparisons, Kirkman found no statistical significance, though she did note some patterns of interest when comparing cell means.

The analysis of variance of the worker role data found statistical significance for the main effects for age ($p < .0001$) and SES ($p < .03$). No significance was found for gender or for any interaction effects. Tukey post hoc comparisons found that older

respondents' scores were significantly higher than those of young and middle respondents. Kirkman also found statistical significance for the upper middle SES group when compared with the lower middle SES group.

Analysis of results for the spouse/partner role found no statistically significant differences for main effects or for any interaction effects for this variable.

Davis

In 2002, Davis researched the disenfranchised and elite social roles for the parent, spouse/partner, and worker roles, to complete the research begun by Kirkman (1994/1995). Davis' data were pooled with Kirkman's in order to obtain results across all five socio-economic groups in the three adult social roles. The pooled data indicated significant effects for SES in all three roles, with the elite level performing significantly higher than the disenfranchised level. For the parent role, Davis also found an interaction effect between age and gender; younger and older males both performed at a higher level than did the females in this role.

Hargiss

The development and content validation of an Interview Protocol and Performance Rating Scale for the leisure time consumer adult social role was completed by Hargiss (1997/1998). The study's objectives were to use Abney's social role research on particular behavioral and skill criteria for the leisure time consumer social role to create the protocol and Performance Rating Scale. The research questions for the study asked if there were identifiable patterns in performance ratings by gender, age, or SES level; the study also examined interaction effects between the variables.

Hargiss's (1997/1998) study found no significant gender differences in the performance of the leisure time consumer social role. There were, however, age and SES level differences. Specifically, Hargiss found significantly higher scores for the older age group than for the younger age group ($p < .01$). Disenfranchised and working SES levels performed significantly lower than the other three higher SES levels ($p = .0165$). No significant interaction effects were found. When examining effect sizes, Hargiss found a large effect size for SES (.54). A medium effect size was found for age (.24), age by SES (.21), and age by gender (.23). The effect size for gender (.10) and gender by SES (.113) were small.

Hargiss also researched the types of leisure-time activities in which her respondents engaged. The top 10 activities, in order, were reading, gardening, exercising/working out, computers, racquet sports, cycling, watching television, listening to music, cooking, and visiting with friends. "Three specific leisure activities were reported in all SES levels, age groups, and genders. The leisure time consumer reported activities were: gardening, reading, and exercising" (Hargiss, 1997/1998, p. 156).

Montgomery

The development and content validation of the contemporary association/club member social role Performance Rating Scale and assessment instrument were described by Montgomery (1997/1998). Differences in social role performance based upon gender, socioeconomic status level, and age were examined, as were the interactions between gender, socioeconomic status level, and age with regard to social role performance. The study found that through the use of a Performance Rating Scale and an Interview

Protocol, reliable distinctions among association/club member social role performances could be made (Montgomery, 1997/1998). When gender, socioeconomic status level, and age were analyzed, age and SES yielded statistically significant performance patterns, supporting the research hypothesis that higher SES levels would show higher social role performance levels.

Specific results of Montgomery's study (1997/1998) found a below-average performance of the association/club social role for this study sample with a mean score of 3.16 and a standard deviation of 2.68. The disenfranchised SES level scored the lowest; the working SES level also scored low. "The mean performance ratings for the lower middle, upper middle, and elite all indicated an average performance of this social role, with the upper middle performing the highest" (Montgomery, 1997/1998, p. 94). Young and older age categories performed below average on this social role (mean scores of 3.04 and 2.66), while the middle age group score was average (mean of 3.79).

Because Havighurst's Kansas City Study reported in Havighurst and Orr (1956) also studied the association/club social role, comparisons between his study and Montgomery's results were possible. The males in the Kansas City Study had a performance mean of 3.67, while the males in this study had a performance mean of 3.14. The Kansas City Study females had a performance mean of 2.20 while the females in this study had a performance mean of 3.19. The two age groups assessed in the Kansas City study (40-70 year olds and 25-30 year olds) differed only slightly from the middle-age and young-age groups in this study. The Kansas City Study young-age performance mean was 3.02 while the young-age performance mean in this study was 3.04. The

Kansas City Study middle-age performance mean was 2.89 while the middle-age in this study had a performance mean of 3.79. Significant main effects were found for age ($p < .050$) and for SES ($p < .0001$); no interaction effects were found to be statistically significant (Montgomery, 1997/1998).

Comparison of Havighurst's four socioeconomic groups to the similar groups in Montgomery's study indicated that the performance level increased with SES level. Montgomery compared the upper middle class performance mean of 4.44 in Havighurst's study to the upper middle level performance mean of 4.61 in that study. The lowest SES levels in both studies reported the lowest performance scores. The overall performance mean for Havighurst's sample was a 2.93, while the overall performance mean of the sample used in Montgomery's study was a 3.16. Both samples performed the association/club member social role at the below-average level (Montgomery, 1997/1998).

Wall

Wall (1997/1998) studied the contemporary home/services manager social role and developed and content validated a Performance Rating Scale and an assessment instrument for this social role. Social role performance was analyzed for differences according to age, gender, SES, and interaction between these demographic variables. Wall's review of the literature on the home/services manager social role led her to four expectations for her results, which she also described in the study's results. Additional analysis was conducted to ascertain if living arrangements affected social role performance ratings for the home/services manager.

Wall found statistically significant results at the $p < .10$ level for gender and SES, indicating that differences in performance ratings of the home/services manager social role existed based upon gender and SES. She also found a significant interaction effect based upon age and gender ($p < .10$). Post hoc tests indicated that the disenfranchised SES group rating was statistically significantly lower than the other four SES groups. The upper middle group had the highest ratings but differences were not statistically significant between the working, lower middle, upper middle, and elite SES groups. Post hoc testing for age differences indicated that younger and older age group's ratings were statistically significant by gender while there was no statistically significant difference by gender in the middle age group (Wall, 1997/1998).

Support for Wall's stated expectations was mixed when data were analyzed. The expectation that females would have higher performance ratings than males for the home/services manager role was confirmed for younger and older females, but not for middle-age females. Wall also expected, based upon the literature, to find that performance ratings of the middle-age group would be higher than ratings for the younger and older age groups; however, Wall found no main effects for age. Age was statistically significant only in interaction with gender, with the higher mean rating scores of middle age males showing statistical significance. With regard to the expectation that role performance would increase with SES level, Wall found that this expectation was not fully met based on the data from this study, since the elite level did not score the highest. "Upper middle level participants had the highest mean, followed by lower middle, elite, working, and then disenfranchised" (Wall, 1997/1998, p. 100). Wall's analysis of living

arrangement found that single, living alone individuals scored significantly higher on home/services manager social role performance than individuals from groups in other living arrangements (Wall, 1997/1998).

Witte

Witte's 1997/1998 study developed and content validated the adult learner social role Performance Rating Scale and assessment instrument. He investigated whether statistically different patterns of performance existed among the variables of gender, age, and socioeconomic status and if interaction effects among these variables yielded significant differences. He also reviewed the Interview Protocols for qualitative information about the preferred methods for acquiring learning and the settings where learning activities are most likely to occur.

The overall performance rating mean for the adult learner social role was 4.85 with a standard deviation of 2.21. The mean score put the overall rating in the medium range for performance. The analysis of variance for Witte's results indicated that the SES variable ($p < .0001$) was statistically significant ($\alpha = .10$). Age and gender main effects were not statistically significant, nor did Witte find any significant interaction effects for the adult learner social role. Further examination of the SES variable data by pairwise combinations of the variables found no differences among the performance rating means for the elite, upper, and middle SES levels. The working and disenfranchised SES categories, however, did have significantly lower means for social role performance than did the other three SES groups.

The preferred method for acquiring learning by all respondents was

watching/asking (40%), with reading ranked second (36%) and formal classes (23%) the least preferred method.

Elite and Upper respondents were the most eclectic of the SES levels citing a wide variety of learning sources, which ranged from formal classes to individually motivated learning efforts. The middle, working, and disenfranchised groups reported fewer multiple learning strategies, often citing only a single method to learn new skills or acquire new information. Informal learning situations were preferred by the majority of interviewees. (Witte, 1997/1998, p. 97)

Yates-Carter

The development of an Interview Protocol and a Performance Rating Scale for the kin/relative adult social role was Yates-Carter's (1997/1998) contribution to the work of the University of South Florida Social Roles Research Team. The content validation of the Performance Rating Scale and the Interview Protocol allowed raters to make reliable distinctions between the social role performance levels of persons who responded to interview questions. Her research analyzed gender-based, age-based, socioeconomic status-based patterns, and interaction patterns in the performances ratings of her research sample. She also explored whether there were significant differences in the performance ratings of African-American and Caucasian racial groups within her sample. In her research, kin/relative was defined as all relatives other than parents, grandparents, children, and spouses; it included siblings, uncles, aunts, nephews, nieces, cousins, and the spouse's relatives of the same degree.

Yates-Carter's (1997/1998) results found no significant main effects for age or gender, nor did analysis yield statistically significant results for interactions among the variables. However, SES was found to be significant ($p < .0001$). Specifically, Yates-Carter found that "(a) with the exception of middle, upper is significantly higher than the other groups; (b) middle is significantly higher than working and disenfranchised; (c) elite is significantly higher than disenfranchised; (d) working is significantly higher than disenfranchised; and, (e) disenfranchised is significantly lower than all other groups" (Yates-Carter, 1997/1998, p. 97). Examination of the disenfranchised SES level found a range of mean scores from 1.8 to 4.3 indicating that not all disenfranchised persons scored low on social role performance; older males had the highest mean scores and middle males had the lowest mean scores among the disenfranchised.

Analysis of the performance rating scores for African-American and Caucasian racial groups found that there was a statistically significant difference in the performances of the two groups, with African-Americans scoring higher than Caucasians ($p < .10$).

Dye

The development and validation of the Performance Rating Scale and Interview Protocol for the social role, "friend," were accomplished in the research of Dye (1998). Her research explored the gender, socioeconomic, and age patterns in the performance of the friend social role; she also questioned what interaction effects between these variables might be present in the study data.

The overall mean score for the friend social role was 5.05, a score at the high end of the average performance level. Dye found that two of the three main effects were statistically significant. Gender mean scores were significant at $p < .0010$, while SES mean scores were significant at $p < .0001$. There was no main effect for age. There was also an interaction effect between age and SES, with statistical significance at $p < .0003$. Specifically, Dye found no statistically significant differences in role performance between young, middle, and older age groups. She did find that females scored higher than males in this role. Also, “significant differences were observed among SES levels, most notably in comparing the disenfranchised and middle SES levels with the remaining SES levels” (Dye, 1998, p. 168). Interaction effects between age and SES were most notable in the contrasts between the performance of individuals in the young middle SES level (young/female/middle with $M=7.8$ and young/male/middle with $M= 6.6$) and the young disenfranchised SES level respondents (young/female/disenfranchised with $M=3.2$ and young/male/disenfranchised with $M=2.3$).

McCloskey

The religious affiliate social role was the focus of McCloskey’s (2000) research to develop and content validate a Performance Rating Scale and Interview Protocol as a part of the University of South Florida Social Role Research Project. McCloskey investigated the gender, age, and socioeconomic patterns identifiable in the performance rating scores for that social role; and he analyzed data for interactions between the variables. Additionally, based upon the literature and prior research conducted by social roles research team members, McCloskey posed four research hypotheses: 1) performance

would differ by socioeconomic status; 2) older adults would perform at a higher level than younger adults; 3) an interaction effect between age and gender would be found, with older women being the highest performers; 4) no difference in social role performance would be found between males and females.

McCloskey found statistically significant effects for age ($p < .001$), gender ($p < .01$), and socioeconomic status ($p < .001$) at a .10 level of statistical significance. Interaction effects were found for age and socioeconomic status ($p < .001$) and age and gender ($p < .067$). Pairwise comparisons found that older disenfranchised adults performed at a statistically significant lower level than older adults in all other older adults. Other statistically significant differences were found: older elites performed higher than younger elites and working level females performed higher than working level males. Two of McCloskey's null hypotheses were supported by his research. He found confirmation for the SES and age main effects. The null hypotheses predicting age by gender interaction effects and no difference in performance by gender were not supported by this study.

Rogers

Rogers (2004/2005) contribution to the University of South Florida Research Group's study of contemporary adult social roles was the development and content validation of a Performance Rating Scale and Interview Protocol for the grandparent role. Her sample for the study was confined to the middle and older age groups because grandparents under age 35 were too rare to include in the study. For consistency and comparability with the other research studies in the project, her sample population was a

quota sample of $n=120$. Rogers also performed analysis on an additional race match subsample of $n=60$ to investigate potential differences in role performance by race/ethnicity. Additionally, Rogers looked at the influence of geographic proximity on role performance.

In the comparability population, Rogers found main effects for SES and gender, but no interaction effects were evident. Lower performance was found for the disenfranchised and working SES levels.

With regard to race/ethnicity, Rogers also found in her subsample that there were statistically significant main effects based upon race/ethnicity. Hispanic grandparents (both grandmothers and grandfathers) had higher involvement in daily living activities than did African-American or white grandparents. African-American grandmothers had more expectation for frequent involvement than did African-American grandfathers. While Hispanic grandparents and African-American grandmothers seemed to see the grandparent role as one of connection with the day-to-day life of their grandchildren, white grandparents were more concerned about noninterference in the parenting process. Whereas Hispanic grandparents saw themselves as stand-by parents, white grandparents saw such involvement primarily in crisis situations.

Performance in the grandparent role was found to be strongest when grandparent and at least one grandchild were geographically proximate. Furthermore, Rogers found that all of the grandparents who were high performers, but geographically removed at the time of the interview, had all lived close to the grandchildren at one time. "So the effect of past proximity, when accompanied by a close relationship with grandchildren, may

have a *long term* [sic] effect on closeness and intimacy despite physical distance” (Rogers, 2004/2005, p. 145).

Barthmus

The most recent social roles research completed for the University of South Florida Social Roles Research Project was conducted by Barthmus (2004/2005) on the citizen role. Using a quota sample of $n=150$ evenly distributed into 30 cells of five interviewees each assigned according to SES, gender, and age, Barthmus content validated a Performance Rating Scale and Interview Protocol for the citizen role. The study of the citizen role revealed significant main effects for SES and age. Barthmus also identified interaction effects by age and gender as well as by age and SES.

Significant differences in performance were found between young (18-34 years) and older (over 65 years) citizens—the older age group achieving higher performance scores; similarly, middle, upper, and elite SES groups performed significantly higher than the disenfranchised and working level citizens. (Barthmus, 2004/2005, p. vii)

Upper, elite, and middle SES groups, in that order, performed significantly higher than working and disenfranchised groups. There were no main effects for gender.

Comparison of Social Role Performance Ratings for Completed Roles

A comparison of the mean performance rating of the social roles previously conducted is presented in Table 6. Of the performance roles, the Parent role ($M = 6.73$) had the highest mean performance rating, with the Worker role ($M = 6.47$) having the second highest mean. The Spouse/Partner role ($M=6.43$) was the only other role that had a mean that over 6.00. These three roles had mean performance ratings that fell in the Above Average category of the rating scale. The lowest mean performance rating was

the Association/Club Member role ($M = 3.16$) which was the only role that had a mean performance rating in the Below Average level. All of the other social role mean performance ratings fell in the Average level. Of those roles, the Home/Services Manager ($M = 4.05$) and Leisure Time Consumer ($M = 4.18$) were just slightly about the minimum level for Average.

Daughter/Son Social Role

A universal social role is Daughter/Son. For most, it is a social role in which one is actively engaged at some level for many decades, from infancy through at least some

Table 6

Mean Performance Rating Scores of USF Social Roles Studies Previously Conducted

Role	Mean
Relational Roles	
Friend	5.05
Grandparent	4.63
Kin/Relative	4.50
Parent	6.73
Spouse/Partner	6.43
Non-Relational Roles	
Adult Learner	4.85
Association/Club Member	3.16
Citizen	4.99
Home/Services Manager	4.05
Leisure-Time Consumer	4.18
Religious Affiliate	5.12
Worker	6.47

Note: $N = 150$ per role; Range of scores was 0 to 9.

of the adult years. Havighurst recognized it as one of the 10 social roles covering most adult activities (1953) and in later writings made reference to the Daughter/Son social role among those under consideration (1955, 1960). Among the adult social roles Havighurst (Havighurst, 1955; Havighurst, 1957) studied, however, the Daughter/Son role was not included in the final analyses in the Prairie City Study (Havighurst & Albrecht, 1953), the Kansas City Study of Adult Life (Havighurst, 1955; Havighurst, 1957; Havighurst & Orr, 1956), or the Cross-National Studies (Havighurst & Neugarten, 1969) on adult social roles. When the role was mentioned in the literature about the studies, the role was described as “child of an aging parent” (Havighurst, 1955; Havighurst, 1957; Havighurst & Albrecht, 1953; Havighurst & Neugarten, 1969; Havighurst & Orr, 1956). While the protocols gathered data on this role, it was ultimately dropped from the findings reports without mention of the rationale (Havighurst, 1955; Havighurst, 1957; Havighurst & Albrecht, 1953; Havighurst & Neugarten, 1969; Havighurst & Orr, 1956). The Havighurst studies, therefore, provide some evidence of the issues of concern to Havighurst through the questions asked on the Interview Protocols, but they give little or no indication of results.

More specifically, tracing the Daughter/Son social role through Havighurst’s work, he addressed developmental tasks for young adults in *Developmental Tasks and Education* (1952), but none of the developmental tasks spoke to the Daughter/Son role. In the Prairie City Study, as reported in *Older People* (Havighurst & Albrecht, 1953), the population of the study was age 65 years and older. The social roles for which data were

gathered did not include Daughter/Son or child of aging parents. Also in 1953,

Havighurst wrote about social roles, saying:

The following list of 10 social roles covers most of the activities of an adult:

- Worker
- Parent
- Husband or wife
- Home-maker or home member
- Son or daughter
- Citizen
- Friend
- Club or association member
- Member of a religious group
- User of leisure time.

(Havighurst, 1953, p. 7)

In 1955, Havighurst expounded on social roles again.

How can social behavior be systematically and quantitatively described? A person's behavior is largely, though perhaps not entirely, a composite of his activity in the several social role-areas which make up the life of an adult. These role-areas are: 1. Parent, 2. Spouse, 3. Child of Aging Parents, 4. Home-maker (for men and women), 5. Worker, 6. User of Leisure time, 7. Church member, 8. Club or Association Member, 9. Citizen, 10. Friend. (Havighurst, 1955, p. 1)

James and Mullen (2002) describe the significance of low and high social role performance.

Success or failure in a particular situation is invariably gauged by how well the exhibited behavior matches role performance expectations. Adults rating high in social role performance are those who are well assimilated into American society and have a good understanding of role expectations. In contrast, low social role performance is associated with low aspiration or motivation, misunderstanding of role expectations, and those who choose not to assimilate into the mainstream of American society. (p. 195)

Havighurst offered Performance Rating Scales for all his identified social roles for persons age 40 to 65 years, including Adult Child of Aging Parents.

High 8-9

Keeps in close personal touch with aging parent (s) by visits, letters, or actually living together. Knows what the needs of parents are. Accepts the responsibility of caring for them while permitting them to be independent in their decisions. Maintains respect for them as individuals, even though they may be dependent upon him in some ways.

Suits his expectations of them to a realistic appraisal of their capabilities and position in life. Is able to adjust to a give-and-take relationship on the basis of this. In face-to-face relations is affectionate without being either dominating or dependent like a child.

Above Average 6-7

Has no responsibility for caring financially for parents but feels a real responsibility for maintaining satisfactory relations with them—visiting them, keeping in touch, sharing with them in an intimate rather than an obligatory way.

Is concerned for their well-being and is ready to help them when needed.

Medium 4-5

Expresses some ambivalence toward parents. Feels that earlier parent-child relationship interferes with attempt to get along now as equals.

Feels that their lives are fairly separate from his. Feels more comfortably away from parents but senses an obligation to see them periodically, to share some family activities with them, to give them an opportunity to see their grandchildren.

Mutuality of interests center in the family and children (grandchildren). They may live a long distance away, and R has no responsibility for them.

Below Average 2-3

Meets obligations to parents in a minimum way. Reacts to the demand of obligation infrequently and periodically gets in touch with them simply because they're his parents and not because of any real concern for them as people. Is uncomfortable in the relationship. Voices some hostility but at the same time has a modicum of respect for the relationship because "they are parents and they're getting older."

If he has to support them, generally does this in most impersonal way possible—puts them in a home, or if they're in his home, treats them as boarders rather than family.

Low 0-1

- A. Manages parents' lives for them, in such ways as to make them feel weak, helpless, or resentful. Does not respect them as individuals. Treats them as children.

B. Rejects aging parents. Has nothing to do with them. Is hostile to them, or indifferent. Accepts no responsibility for them.
(Havighurst, 1955, pp. 5-6)

In 1957, Havighurst again discussed social roles, this time reporting on the Kansas City Study of Adult Social Roles in a monograph entitled “Social Competence of Middle-Aged People.” Here he described nine adult social roles and did not include Child of Aging Parents. Although he presented the Performance Rating Scales he had presented in the 1955 Research Memorandum on Social Adjustment in Adulthood and Later Maturity, the Child of Aging Parents role was dropped.

Havighurst and Orr (1960) described a portion of the Kansas City Study of Adult Life, emphasizing in this report, the developmental tasks associated with adult life. Ten adult social roles were identified.

The social expectations which impinge upon an adult in modern society may be described in a limited number of areas of behavior, as follows:

Parent	User of Leisure
Spouse	Church Member
Child of Aging Parent	Club or Association Member
Home-Maker (male or female)	Citizen
Worker	Friend.

(Havighurst & Orr, 1960, p. 6)

One of the developmental tasks of middle age identified is “Working out an Affectional But Independent Relationship to Aging Parents” (Havighurst & Orr, 1960, p. 15). They described the nature of the task as follows:

People of 45 to 60 generally have parents who are beginning to show and to feel their age. At this point it becomes desirable for adult children and aging parents to reorganize their relationships. The adult children must find ways of maintaining an affectionate and friendly but neither dependent nor dominant relation. And eventually, if the aging parents lose their health or their grasp of the world, the adult children will have to take some responsibility for them. This task requires a delicate touch, an ability to be objective, a basic love of one's parents. (Havighurst & Orr, 1960, pp. 15-16)

Performance of this developmental task is described in five levels, essentially the same as in the Performance Rating Scale offered in 1955 for the Child of Aging Parents adult social role. This study does provide some data on the Child of Aging Parent as a developmental task of middle age, based on social class. See Table 7 for performance scores from the Kansas City Study.

The Cross-National Study of social roles (Havighurst et al., 1972) reported findings on 12 adult social roles that did not include Daughter/Son or child of aging parent. The Interview Protocol did include a section titled "Child of Aging Parent" with suggestions for probes.

Is your father or mother still living? (Check to see whether or not death has occurred within the last ten years.)
How about your wife's father or mother?
(Probe for activity and involvement and for financial support. Probe also for change in last ten years, and affect regarding change) .
(Havighurst et al., 1972, p. 170)

Table 7

Performance Scores of Kansas City Adults on the Developmental Tasks of Middle Age

Child (Age 40-70) of Aging Parent

Men				Women			
Social Class*				Social Class*			
I	II	III	IV	I	II	III	IV
5.89	6.06	5.89	5.00	5.75	5.90	5.94	5.75
*Social Class I		Upper-middle class with a few upper class persons					
Social Class II		Lower-middle class, white collar clerical workers, owners of small businesses, foremen, supervisors, and highly skilled artisans					
Social Class III		Upper-lower class—regularly employed manual workers, factory workers, truck drivers, other hard-working people					
Social Class IV		Lower-lower class—unskilled workers, with a few unemployed people and some welfare recipients					

Adapted from Havighurst & Orr, 1960, pp. 30, 32.

Abney's (1992/1993) study identifying contemporary adult social roles found that Daughter/Son was an important adult social role with an average ranking of 3.5 among all social roles. It was the only role significant for SES alone, based on reported importance. There are, however, many differences in how the role evolves over the life cycle, as reflected in the changing developmental tasks associated with the Daughter/Son role (Abney, 1992/1993). Further, the role can be examined in light of perceptions of societal expectations of a Daughter/Son's fulfillment of that role as well as the unique expectations of a particular family about the requirements for satisfactory fulfillment of the Daughter/Son social role; the behaviors that characterize the enactment of the role by

a particular Daughter/Son; and the Daughter/Son's attitudes about the manner in which he/she fulfills the role. These three categories (perception of role expectations, activities associated with role fulfillment, and attitudes toward role fulfillment) provide the framework for role examination in the Interview Protocol in this study. Literature related to these three categories is presented in this chapter.

Many variables also influence these three categories associated with role performance. These factors include

1. Age of Daughter/Son and age of the parent(s)
2. Gender of child and gender of parent(s)
3. Marital status of child and parent(s)
4. Health of child and parent(s)
5. Financial status of child and parent(s)
6. Relationship (consanguineous, adopted, step, in-law)
7. Geographic proximity of the child and parent(s)
8. Affective history and bonds
9. Filial responsibility expectations.

This section examines the literature with regard to the influence of these variables on performance of the Daughter/Son adult social role. The interactions and expectations characterized as the Daughter/Son social role may include a variety of biological and legal relationships. The multiplicity of family arrangements in contemporary society has also made definition of the role more complex. For the purposes of this study, however,

the Daughter/Son social role will be defined by the relationship of a child to a parent within the following parameters:

1. the natural, biological child of the legal parent,
2. the legally adopted child of the parent,
3. the child of a parent legally married to someone who is not the child's biological or adopted parent (step-child),
4. the spouse of a child or step-child (in-law).

Primary Research Study Variables

The University of South Florida Social Roles Research Project has consistently incorporated the three variables of age, gender, and SES (socioeconomic status) into the various studies (Abney, 1992/1993; Barthmus, 2004/2005; Davis, 1998; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 2000; McCoy, 1993/1994; Montgomery, 1997/1998; Rogers, 2004/2005; Wall, 1997/1998, Witte, 1997/1998; Yates-Carter, 1997/1998). Age has been defined as the chronological age of the respondent at the time of the interview. Gender was the self-reported male or female categorization. Socioeconomic status was defined according to a three-dimension process developed by James and Abney (1993) incorporating occupation, education, and income into a five-level framework.

Main effects and interaction effects for these three variables were measured in each study. The only common finding in all studies had been a main effect for SES. The existence of main and interaction effects for each social role are presented in Table 8.

Age. The age of both parent and child are relevant variables in the study of the Daughter/Son adult social role. The developmental tasks of various life stages described by Havighurst (1960) provide some information about the nature of the activities associated with this role. The only developmental task that directly addresses the Daughter/Son social role activity reflected in Havighurst's developmental tasks is during the Daughter/Son's middle years (1960) when they must "work out an affectionate but independent relationship with aging parents" (Havighurst & Orr, 1960, p. 15). A review of contemporary literature also reflects the importance of the Daughter/Son social role when parents age, and there is significant literature on the parent/child relationship in later life families (Brubaker, 1985, 1990; Fingerman, 2001; Mancini & Blieszner, 1989; Bahr & Peterson, 1989). The shift in the Daughter/Son role takes place largely in relation to the health of the parent; and as aging results in mental and physical frailty, the Daughter/Son often assumes more responsibility for the care of the parent(s). With life expectancies increasing, even those in what Havighurst considered Later Adulthood (age 65 and older) may now find themselves caring for their parents. While developmental tasks are generally age-related, they can surface at other times because they are not merely products of chronology or physical development.

Thus, developmental tasks may arise from physical maturation or change; from social roles, pressures, or opportunities; or from aspirations and values of a constantly emerging personality. In many cases they arise from combinations of these three major forces acting together. During early and middle adulthood, social demands and personal aspirations dominate in setting and defining major developmental tasks. With later middle age and beyond, biological changes become an increasingly significant consideration. (Chickering & Havighurst, 1981, p. 26)

Abney (1992/1993) and McCoy's (1993/1994) (1993) research found eight developmental events related to the Daughter/Son adult social role and placed them in three phases roughly aligned in the young and middle adult years. The developmental tasks related to each phase, according to the work of Abney, are presented in Table 9.

Although phases represent what is typically a sequential process over the lifetime, these developmental tasks can become dominant at other points in the life cycle of family relationships. Disruptions in the parental marital relationship or development of significant health issues for a parent can propel the Daughter/Son role into other phases of activity. These non-normative events are precipitated by individual developmental paths in either the child or the parent and may also drive changes in family relationships (Aquilino, 1997).

Table 8

Existence of Main and Interaction Effects in Completed USF Social Roles Studies

Role	Age	Gender	SES	Age X Gender	Age X SES	Gender X SES	Age X Gender X SES
Relational Roles							
Friend	N*	Y*	Y	N	Y	N	N
Grandparent	N	Y	Y	N	N	N	N
Kin/Relative	N	N	Y	N	N	N	N
Parent	Y	N	Y	Y	N	N	N
Spouse/Partner	N	N	Y	N	N	N	N
Non-Relational Roles							
Adult Learner	N	N	Y	N	N	N	N
Association/Club Member	Y	N	Y	N	N	N	N
Citizen	Y	N	Y	Y	Y	N	N
Home/Services Manager	N	Y	Y	Y	N	N	N
Leisure Time Consumer	Y	N	Y	N	N	N	N
Religious Affiliate	Y	Y	Y	N	Y	Y	N
Worker	Y	N	Y	N	Y	N	N

*Note**. Y indicates significant differences noted in sample; N indicates no significant difference found. Adapted from Rogers, 2004/2005.

Table 9

Phased Developmental Tasks for Daughter/Son Social Role

Entry Phase	Intermediate Phase	Advanced Phase
Establish autonomy independence from parents.	Redefine family relationships.	Accept and adjust to aging process of parents
Relate to parents as an adult.	Responsibility for three-generation family; i.e., growing children, and aging parents. Adjust to giving increased support to aging parents. Handling increased demands of older parents	Acceptance of chronic illness, frailty, and/or death of parent.

Note. From Abney, 1992/1993, p. 192.

The family life cycle pattern is one in which the child's relationship to the parent moves from dependence to mutuality to responsibility. Lewis (1990) discusses the four stages of the dependency cycle within which most major changes take place. "These stages may be called: (1) young childhood/new parents; (2) adolescence/continuing parenthood; (3) young adult child/middle-aged parents; and (4) middle-aged child/feeble elderly parents" (Lewis, 1990, p. 73). The first two stages represent the dependence of the child on the parents, the third stage is one of mutuality, and the fourth stage is the one in which the child must begin to take more responsibility for the parents' needs and

becomes the “parent” in the relationship. It is a major shift from the mutuality of the previous stage.

In the third stage, Lewis (1990) notes that interdependence between the generations is characterized by shared activities, frequent contact, and mutuality of aid; instrumental aid, he noted, still is provided by the older generation to the younger, and mostly to married daughters as gifts. Children are typically establishing their own homes and careers and taking on the role of parent themselves during the years of early adulthood. Mutuality increases as children assume adult roles, and children can provide support for parental needs. During this time period, “young adults generally experience close relationships with their parents, and that the parent-child bond remains important for the child’s psychological well-being” (Bucx & van Wel, 2008, p. 71).

Aquilino (1997) describes the family life cycle movement similarly in the following statement:

The relationship moves from child dependence on parents to one of interdependence. Mutuality should be accompanied by a decrease in parent-child conflict over issues of everyday living (such as how the child dresses or spends money) and a lessening of parental attempts to control their children’s behavior. Mutuality also can be seen in the ability of each member of the dyad to find pleasure in the other’s company and to forge a relaxed relationship marked by humor and affection, rather than tension and emotional distance Each of the transitions that are normative or expected for young adults should entail a gradual increase in independence from parents and a continuation of the individuation process begun in adolescence. (p. 673)

When children move into new developmental phases according to parental expectations, conflict is minimized. Aquilino notes that intergenerational similarity is a helpful hypothesis for understanding this transition.

The hypothesis suggests that when grown children move into adult roles (such as transitions to worker, wife or husband, and parent), their roles and experiences become similar to the roles and experiences of their parents. The expectation is that the increasing similarity of life experiences will strengthen parent-child relations and ease the way for more adult-like mutuality in the relationship. (1990, pp. 673-674)

Stage three is marked by the child's life changes as he/she moves into adult roles and responsibilities, thus changing the dynamics of the parent/child relationship. Stage four, on the other hand, is precipitated by changes in the parent life circumstances. The relationship shifts as the effects of aging take their toll on the parents' ability to participate mutually in the relationship, and the child takes on the tasks of filial responsibility. Lewis (1990) notes that fourth stage transitions are often difficult for both generations.

Even though most Americans subscribe in some degree to the norms of filial piety—the responsibility of children to care for their aging parents—the transition from interdependence between these generations to dependence of the aged generation is often experienced suddenly and as a crisis. For many family members, this shift to dependency may result from a serious illness or financial crisis for the aging member. The resulting transition is, therefore, often experienced as difficult for both generations. (Lewis 1990, p. 79)

Changes in parental physical and mental health, marital status (due to death of one parent), or financial resources may create dependence on the next generation for support. Age per se is not the cause of change in parental circumstance and the impact of devastating health issues can arise at any age. Nonetheless, the possibility of parental need and dependence increases with the increased risk of declining health and abilities associated with aging.

For the purposes of this study, age of respondents was categorized into three levels: young, middle, and older. Young includes those from 18 to 34 years of age. The middle-

age group includes those from 35-64 years of age. Older includes 65 and older years of age. This is consistent with previous age categories used in the University of South Florida Social Roles Research Project (Abney, 1992/1993; Barthmus, 2004/2005; Davis, 2002; Dye, 1998; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 2000; McCoy, 1993/1994; Montgomery, 1997/1998; Rogers, 2004/2005; Wall, 1997/1998, Witte, 1997/1998; Yates-Carter, 1997/1998).

Gender. The increased flexibility of gender-specific behaviors is a notable social change that has occurred in contemporary American society since the 1950s and the original adult social roles research. Havighurst (1952) wrote in the 1940s, “the approved feminine sex role is changing” (p. 38). He observed:

Since the masculine and the feminine roles are different in our society, a boy has to accept the idea of becoming a man and a girl has to accept the idea of becoming a woman. For boys, this seems easy in our society, which offers its principal places to men. Most girls also find it easy to accept the role of wife and mother, with dependence on a man for support. But a number of girls find this to be difficult. They want a career. They admire their fathers and their older brothers and want the freedom and power and independence of the male. For them it is not an easy task to accept the feminine role. Fortunately, our society’s definition of the feminine role is broadening to give more satisfaction to girls of this type. (Havighurst, 1952, pp. 37-38)

Since Havighurst’s work, roles for both men and women have broadened, and men are now more comfortable with what were once more feminine role behaviors (e.g., nurturing and care giving) than in earlier generations.

Of course, some of the family patterns we find in middle-aged and older adults today reflect prior societal gender values. As today’s young cohorts grow older, current gender differences in men and women’s affiliation with their families of origin may begin to dissipate. In the future, parents may place less emphasis on daughters’ maintenance of family ties or more emphasis on seeing their sons. Mobility and

changes in women's roles in the past 3 decades have been accompanied by shifts in the definition of men's and women's roles. (Fingerman, 2001, p. 44)

Gender differences not only in role performance level but also in the activities undertaken as a manifestation of role performance may be gender-specific. Rossi and Rossi (1990) noted, for example, that there are different patterns of interaction between males and females, both as parents and as the child. "Most studies find that the vast majority of caregiving children are daughters" (Mancini & Blieszner, 1989, p. 282). Lazarus and Lazarus (2006) also observed that it is usually a female family member or friend who becomes the caregiver of females. The females are caregivers to the males, but males are more uncomfortable with that role. There is additional evidence that female-to-female interaction is the strongest of the child/parent bonds. Fingerman (2001) observed, "Relationships between older mothers and daughters are distinct from other social ties across a number of dimensions. The bonds tend to be tighter, the intimacy greater, the interactions more frequent and of a more emotional quality" (p. 37). Also describing the mother-daughter dyad, Rossi and Rossi (1990) found

The greatest contract between the four dyads is that between the mother-daughter and the father-son relationship. The mother-daughter emerges as relatively immune to the influence of changing life circumstances, implying greater stability and a much less conditional quality to the mother-daughter interaction pattern. (p. 383)

The father-son dyad, on the other hand, was significantly impacted by a number of variables. For example, the extent to which they share similar values affected frequency of contact. Married sons also had more contact with their fathers than did single ones (Rossi & Rossi, 1990).

Socioeconomic Status (SES). In contemporary American society, socioeconomic status is a potent variable in any measure related to human behavior. One's view of the world and her or his place in it relative to others has to do with social constructs that are highly influenced by both social and economic factors. Because social and economic factors consist of attributes that tend to cluster together (Kahl & Davis, 1955), precisely defining SES can be difficult (James & Abney, 1993). James and Abney (1993) also observed,

Occupation as a component of SES is generally a function of education and highly related to income. In a similar fashion, education and income are also highly related. As a person's education level increases, his or her income level generally increases. (pp. 40-41)

SES is, nevertheless, a critical variable to understanding social role; and, therefore, it is an essential variable in the University of South Florida Social Roles Research Project. Furthermore, since this research project is intended to update Havighurst's social roles research, SES must be an included variable. Havighurst's research included the SES variable, and he found a positive relationship between social role behavior and SES (Havighurst & Albrecht, 1953; Havighurst & Orr, 1956).

In an extensive review of the literature on SES measures, James and Abney (1993) proposed a multi-variable formula that is a product of occupational status, education, and family income as a framework for determining SES level. Occupational status in their original proposal was based upon the work of Beeghley (1989) and Nam and Terrie (1988) and the U. S. Bureau of the Census, 1990. Five occupation levels were defined;

the five levels are presented in Table 10 with the occupation category, score range, and the estimated percentage of the U. S. population.

After the 2000 U.S. census, a revised Occupational Scores index was available (Nam, Powers & Boyd, 2000); this more current rating of occupations was used by Barthmus (2004/2005) and Rogers (2004/2005) and will also be used for this study of the Daughter/Son role. See Appendix A for the revised 2000 Occupational Scores Index grouped by SES level. Educational level is determined by the amount of schooling and degrees received. In the case of the Elite level, graduate degrees from prestigious institutions are the standard. Five levels were determined by James and Abney (1993) for use in the social roles research. See Table 11 for the five educational levels used in the determination of socio-economic level.

Family Income is the third variable used to determine SES. After 2000 U.S. Census data were available, income levels were adjusted for the later studies in this project (Barthmus, 2004/2005; Rogers, 2004/2005). These adjustments were made to maintain approximate comparability to earlier studies that had been based upon 1990 Census information and income levels. Table 12 provides a summary of all variables by stratification level and includes the revised income data.

Other Factors of Interest

Marital Status

The marital status of both parent and child is a variable in the Daughter/Son role performance. Divorced children are less able to provide support to parents and may, in

Table 10

Occupation Levels by Category, Score Range, and Estimated Percentage of Population

Level	Occupational Category	Score Range	Est. % of US Population
1	Unskilled Laborers/ Private Household Workers	1-9	16
2	Operators/Fabricators/ Clerical/Service Workers	10-65	39
3	Sales/Craftsman/ Precision Workers	66-87	20
4	Managers/Administrators Professionals	88-98	20
5	Executives/Elite Professionals	99-100	5

Sources: Beeghley, 1989; Nam & Terrie, 1988, Appendix; U.S. Bureau of the Census, 1990, pp.41-44; as noted in James & Abney, 1993, p. 45. Reprinted with permission.

fact, be in need of support themselves. For example, Aquilino (1997) found support for the idea that as the child takes on adult roles, the relationship between parent and child becomes more interdependent as their lives become more similar. An exception to this was found in his research; when a child's marriage ends in divorce, the quality of the intergenerational relationship drops. Aquilino proposed that the disruption in the child's marriage places demands for resources on the parent and noted that one-third of newly divorced children return to their parental home to live initially, an arrangement that

Table 11

Educational Levels Defined for Five Levels

Level	Education
Elite	Graduate of Professional Degree from Prestige School
Upper Middle	College degree; graduate/professional degree
Middle	Some college
Lower Middle	High School graduate
Disenfranchised	Less than high school

Note. From James & Abney (1993), p. 21. Reprinted with permission.

is generally not seen as satisfactory from a parental perspective (1997). Married children provide less assistance to their parents than do single children, presumably because of time constraints. Children who are divorced or separated provide even less assistance to parents than do married children (Mancini & Blieszner, 1989).

Fathers who are divorced from the adult Daughter/Son's mother suffer negative consequences in terms of their relationships with their children. In a study investigating whether a divorce impacts the long-term relationship between men and their adult children, Cooney (1990) found:

The answer is unequivocal: divorce has pronounced negative effects on men's contacts with their adult offspring and on their perceptions of adult children as potential sources of support in times of need. . . . Over 90% of never-divorced older men have weekly contact with at least one of their adult children, while the same is true of only half of ever-divorced men. Furthermore, one-third of the ever-

Table 12

Comparison of Variables by Stratification Levels

Variable	Elite	Upper Middle	Lower Middle	Working	Disenfranchised
% of Population	5	20	25	35	15
Income	\$125,000+	\$100,000-\$124,999	\$35,000-\$99,999	\$15,000-\$34,999	under \$15,000
Source of Income	Investments	Fees and Salaries	Salary	Wages, tips	Gov't aid
Wealth	Great wealth. Inherited Money	Property from savings/investments.	Few assets. Some savings	Few to no assets, no Savings.	None
Education	Prestige Schools/ Professional	College/Grad. School	Some college	High School	Less than high school
Occupation	Professionals, CEOs High ranking government	Professions, Managers Administrators	Small business, sales, craft, precision	Operators, fabricators, clerical, service	Unskilled laborers
Occupational Status	Very High	High	Medium	Low	Very low

Note. From Beeghley, 1989, pp. 24, 158.188; Nam & Terrie, 1988; Robertson, 1980; Rossides, 1990, pp. 406-8; U.S. Bureau of the Census, 1988, 1990; James & Abney, 1993. Reprinted and adapted by permission.

divorced older fathers essentially have lost contact with one or more of their adult children—a situation almost nonexistent among never-divorced men. (p. 685)

With regard to marital status of the parent, Aquilino (1997) found that stepparents felt less close to adult children than did biological parents and received less support from the child.

Geographic Proximity

Physical distance between adult children and their parent(s) is another variable that potentially accounts for role performance differences. Peterson (1989) reported that research indicates that distance has little or no impact on affections or endurance of the parent/child relationship. He also found evidence of the frustration and guilt that distant children often feel because they may be outside of decision-making and unable to participate in rendering certain types of services. Opportunity for direct physical contact is more abundant when geographic locations are proximate.

Many kinds of help that close kin provide to each other require accessibility for social interaction. Help with childcare, domestic chores, or caregiving during an illness assumes some face-to-face contact. Other types of help could theoretically be given in the absence of face-to-face contact. Providing money or a loan, giving advice, or providing comfort could be done across great distances, through phone conversations, or by mail. However, it seems likely that even these latter types of help would be offered more frequently to those who live nearby than to those who live at a great distance, because social interaction provides the opportunity to learn about the problems and needs of a parent or child, and to reciprocate with information about one's own problems and needs. (Rossi & Rossi, 1990, pp. 365-366)

Adult children and parents can find themselves living together. Children can move back home, or parents may need to move in with a child, particularly after divorce or death of a spouse. There were gender differences with respect to a parent's comfort level with the idea of living with a child, with females more positively inclined to do so.

“Parents who received high levels of filial support from their children were likely to be female, not married, of low income, and in poor health” (Mancini & Blieszner, 1989, p. 276). Mancini and Blieszner (1989) also reported on findings indicating a desire for abstract demonstrations of care such as affection, thoughtfulness, and open communication more than for the instrumental assistance.

An interesting profile emerges for the impact of home leaving on the parent-adult child relationship. Parents of coresident adult children, compared with those with sons and daughters living elsewhere, reported higher levels of emotional closeness, shared activities, and support from children, but also higher levels of conflict and control issues. The pattern suggests a high degree of involvement and day-to-day interaction between parents and coresident adult children. It also suggests that issues of parental authority and their children’s right to make their own choices play a greater role during periods of coresidence. Control issues subside when children leave home, but parents also feel less connected to their grown children emotionally and are less likely to view them as a source of support. (Aquilino, 1997, p. 679)

Aquilino’s study of young adult and parent relationships indicated with regard to the leaving home transition that “home leaving acts as a catalyst for movement toward a more individuated relationship that is based on the mutual care respect of two adults” (1997, p. 682). He also found, however, that parents do not feel as close emotionally to their non-resident children and are then less likely to see them as sources of support during the young adult years.

Health of Parent/Child

Helping activities increase with decline in health of aging parent. The nature of the relationship changes, with mutuality decreasing and dependence of the parent on the child increasing. If an older couple is married, they will typically provide for each other as long as they are able. When an elderly person is alone or the spouse is unable to

provide sufficient care, then a child will need to become more active in the giving of care (Stoller, 1983). Mancini and Blieszner (1989) also found that older parents and children participate in a reciprocal relationship, depending on needs and resources, until the older generation is unable to do so. “When parents become widowed, develop frail physical health, and/or suffer from conditions affecting their cognitive functioning, however, the parent-child interaction pattern often changes” (p. 282).

Health also impacts the child’s ability to provide assistance to a parent or to be involved in activities with the parent. Particularly as the population ages, older children may be called upon to take care of even older parents. The health of the parent may require more assistance than a child who also has health issues can provide, and that will influence the ability to engage in the Daughter/Son role at higher levels (Rossi & Rossi, 1990).

Other Commitments: Work and Children at Home

The ability of the daughter or son to be involved in the lives of he/his parents can be impacted by employment and the needs of their own children at home. The time for extensive involvement in activities with parents may give way to the needs of their own family.

Employment is another potential influence on the amount of Daughter/Son social role involvement.

Although the amounts of help with tasks such as shopping, transportation, housekeeping, money management, and emotional support did not differ between the two groups of daughters; those who were employed provided less personal care and cooking than the nonworking daughters. Families of employed

caregivers tended to be paid helpers for these personal care and meal tasks” (Mancini & Blieszner, 1989, p.282).

Stoller (1983), on the other hand, found that while employment did reduce the amount of time sons gave to caregiving, it did not impact the help given by daughters. All ages believe that children, both sons and daughters, should be available to assist parents and to make some adjustments in their own lives in order to do this. “This help should be facilitated by adjustment of family schedules and assistance with health care costs if necessary, but respondents were not in favor of family caregivers adjusting their work schedules or sharing households with their parents” (Mancini & Blieszner, 1989, p. 277).

At the same time, when families live in close proximity and parents are in good health, the Daughter/Son may also benefit from receiving help with their children, especially for child care.

Studies of exchange, assistance, and support conducted over the past 25 years showed a large amount of intergenerational involvement, both instrumental and affective. Not only are parents and their children in frequent contact, but also the practical things they do for each other are considerable. (Mancini & Blieszner, 1989, p. 279)

While having children can restrict the amount of time available to assist parents, it also becomes the occasion for receiving assistance and for reinforcing a mutually beneficial reciprocal relationship between the generations.

Summary

This chapter first reviewed the literature on social roles and adult education. The next strand of literature examined the adult development literature, with emphasis on

Erikson and Levinson because these theories have particular relevance to the social role construct. Havighurst's research in the Prairie City Study, the Kansas City Study, and the Cross-National Study was also covered as part of the adult developmental strand. The University of South Florida Social Roles Research Project was presented with data from completed studies. Literature relevant to the design of this study, including the variables incorporated into all the social roles research studies was addressed. Additional literature pertaining to other factors influencing the Daughter/Son role performance was presented.

CHAPTER 3

METHODS

The purpose of this study was to develop and content validate a Performance Rating Scale and an Interview Protocol that can be used to define the contemporary Daughter/Son adult social role. A secondary purpose was the updating of the concepts regarding the Daughter/Son adult social role that grew out of the research of Havighurst (1957; Havighurst & Albrecht, 1953; Havighurst & Orr, 1956). In addition to the development of the instruments, the study implemented an exploratory investigation using the instruments to gather data on the contemporary Daughter/Son role. The study was conducted primarily in the Tampa Bay area of Florida, though some participants were from elsewhere.

This chapter describes and discusses the study's research design and methods, including: the procedures used to develop and to content validate the Performance Rating Scale; the procedures used to develop and content validate the Interview Protocol; the process used to field test the Performance Rating Scale and the Interview Protocol; the training of interviewers and performance level raters; and the implementation of the exploratory study using the instruments. The description of the implementation of the study includes discussion of the research sample, the process of data collection, and the data analysis procedures. The chapter concludes with a summary of the research methods utilized in the study..

Research Design and Methods

Research Objectives

There were four research objectives of this study.

1. To content validate a Performance Rating Scale for the Daughter/Son adult social role in order to enable researchers to assess the role performance of individual adults across the life span.
2. To content validate an Interview Protocol for the adult social role of Daughter/Son in order that reliable distinctions can be made about the role performance of individuals.
3. To implement the use of the Performance Rating Scale and the Interview Protocol in a study of a quota sample of subjects primarily in the Tampa Bay, Florida, area, but including some respondents from South Carolina and elsewhere.
4. To generate data from the exploratory study about the Daughter/Son role performance that could suggest further research possibilities and, in particular, could suggest research related to developmental tasks across the life span that are unrelated to care for an aging parent.

Research Questions and Hypotheses

Related to research objective #4 above, the data generated will be analyzed for Daughter/Son social role performance. Based upon the literature review and the findings of previous University of South Florida Adult Social Role Research Project studies (Abney, 1992/1993; Barthmus, 2004/2005; Davis, 2002; Dye, 1997; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 1999; McCoy, 1993/1994; Montgomery, 1997/1998;

Rogers, 2004/2005; Wall, 1997/1998; Witte, 1997/1998; Yates-Carter, 1997/1998), the following research questions are addressed in this study:

1. Are there age-related differences in adults' performance of the Daughter/Son adult social role?
2. Are there gender-related differences in adults' performance of the Daughter/Son adult social role?
3. Are there socio-economic status differences in adults' performance of the Daughter/Son adult social role?
4. Are there interaction effects between the age, gender, and socio-economic status variables related to role performance of the Daughter/Son adult social role?
5. Are there activities related to performance of the Daughter/Son social role suggested by the respondents that are not related to the aging and increasing dependency of parents?
6. Are there other significant variables that influence Daughter/Son social role performance?

To verify further the validity of the instruments, based upon the literature and prior research, the following hypotheses were presented:

1. There are gender-related differences in adults' performance of the Daughter/Son social role, with daughters performing at higher levels.
2. There are socio-economic status differences in adults' performance of the Daughter/Son social role.

Study Design

This study was a content validation study. “The validity question is concerned with the extent to which an instrument measures what one thinks it is measuring” (Ary, Jacobs, & Razavieh, 1990, p. 256). According to Crocker and Algina (1986), content validation is one of three types of validation, and it is “for situations where the test user desires to draw an inference from the examinee’s test score to a larger domain of items similar to those on the test itself” (p. 217). Borg and Gall (1989) define content validity as “the degree to which the sample of test items represents the content that the test is designed to measure” (p. 250). They further state, “content validity is determined by systematically conducting a set of operations such as defining in precise terms the specific content universe to be sampled, specifying objectives, and describing how the content universe will be sampled to develop test items” (pp. 250-251). Crocker and Algina (1986) also recommend that the process of content validation consist of, minimally, the following four steps:

1. Defining the performance domain of interest
2. Selecting a panel of qualified experts in the content domain
3. Providing a structured framework for the process of matching items in then performance domain
4. Collecting and summarizing the data from the matching process. (p. 218)

The research in this study was designed according to the process for constructing a subject-centered measurement instrument recommended by Crocker and Algina (1986). The principles of this process were utilized for both the Performance Rating Scale construction and the Interview Protocol construction.

1. Identify the primary purpose(s) for which the test scores will be used
2. Identify behaviors that represent the construct or define the domain
3. Prepare a set of test specifications, delineating the proportion of items that should focus on each type of behavior identified in step 2
4. Construct an initial pool of items
5. Have items reviewed (and revise as necessary)
6. Hold preliminary item tryouts (and revise as necessary)
7. Field-test the items on a large sample representative of the examinee population for whom the test is intended
8. Determine statistical properties of item scores and, when appropriate, eliminate items that do not meet pre-established criteria
9. Design and conduct reliability and validity studies for the final form of the test
10. Develop guidelines for administration, scoring, and interpretation of the test scores (e.g., prepare norm tables, suggest recommended cutting scores or standards for performance, etc.). (p. 66)

University of South Florida Social Roles Research Project

The development and content validation of the Performance Rating Scale and the Interview Protocol for the Daughter/Son adult social role was based on the process developed by the University of South Florida Social Roles Research Project team. See Appendix B for a listing of the University of South Florida Social Roles Research Project team members. The first research project was undertaken by Abney (1992/1993). The purpose of his research was to revise and update Havighurst's adult social roles and to content validate the social roles and their associated developmental events. Abney's research was on three socioeconomic levels (working, middle, and upper middle SES levels). Using panels of experts, he identified 13 contemporary adult social roles, which were then validated in a community survey of a quota sample of 180 respondents in the Tampa Bay area of Florida. Respondents were placed in 18 cells representing five age categories, two gender categories, and three socioeconomic levels (worker, lower middle

class, and upper middle class). McCoy's (1993/1994) research extended Abney's work to include the disenfranchised and elite socioeconomic levels.

The work of Abney (1992/1993) and McCoy (1993/1994) provided the foundation for the next phase of the University of South Florida Social Roles Research Project, the development and content validation of Performance Rating Scales and Interview Protocols for each of the identified social roles. Kirkman's research (1994/1995) of the parent, spouse/partner, and worker roles for the worker, lower middle, and upper middle socioeconomic status levels established the procedures for development of the Performance Rating Scale and the Interview Protocol used by subsequent researchers. Davis (2002) extended Kirkman's study of the parent, spouse/partner, and worker roles to the disenfranchised and elite levels. Hargiss (1997/1998) examined the role of leisure time consumer; Montgomery (1997/1998) studied the association/club member role; Wall (1997/1998) investigated the home/services manager role; Witte (1997/1998) looked into the adult learner role; Yates-Carter (1997/1998) examined the kin/relative role; Dye (1998) considered the friend role; and McCloskey (1999) explored the religious affiliate role. Barthmus (2004/2005) conducted the study of the citizen role, and Rogers (2004/2005) investigated the grandparent role. This research of the Daughter/Son role completes the development and content validation of the Performance Rating Scales and Interview Protocols for each of the 13 adult social roles. It concludes the exploratory studies of the 13 adult social roles using the Performance Rating Scales and Interview Protocols.

Identification and Description of Research Strands

During the review of the literature on the Daughter/Son adult social role, the work of Havighurst, and the USF Social Roles Research Project studies (Abney, 1992/1993; Barthmus, 2004/2005; Davis, 2002; Dye, 1998; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 2000; McCoy, 1993/1994; Montgomery, 1997/1998; Rogers, 2004/2005; Wall, 1997/1998; Witte, 1997/1998; Yates-Carter, 1997/1998), four strands were identified: Involvement, Perception, Activities, and Role Improvement.

The Involvement strand deals with the frequency of contact and the amount of overall time the respondent estimated that she/he spent related to the Daughter/Son social role. The second strand, Perception, investigated the respondent's perception of the role in terms of her/his personal satisfaction and personal benefit from performing the role, and the respondent's perceived importance of the role in her/his life. Performance descriptors on role importance, perceived personal benefit from performing the role, and satisfaction received from performing the role were presented. The Activities strand inquired about the amount of time devoted to activities with parents, the range of activities, and the effort the respondent expended to initiate activities. The fourth strand was Role Improvement. Past efforts and perceived need for role improvement were included within this strand.

Procedures for the Validation Process

The procedures used in this study for content validation of a Performance Rating Scale and Interview Protocol for the Daughter/Son adult social role are based upon the conceptual framework described by Crocker and Algina (1986). Abney (1992/1993)

used expert panels to identify the contemporary adult social roles that have been the subjects of the University of South Florida Research Project. He also introduced the use of expert panels for describing the attitudes and behaviors associated with the developmental tasks for each of the identified social roles. Kirkman (1994/1995) successfully employed this technique in the first of the University of South Florida Social Roles Research Project studies on the parent, spouse/partner, and worker roles. Since her study, this process has been incorporated by all the social role research studies that have followed: in chronological order, these studies were completed by Hargiss (1997/1998), Montgomery (1997/1998), Wall (1997/1998), Witte (1997/1998), Yates-Carter (1997/1998), Dye (1998), McCloskey (2000), Davis (2002), Rogers (2004/2005), and Barthmus (2004/2005).

This study of the Daughter/Son adult social role utilized panels of experts from human development, psychology, social work, educational measurement and research, educational foundations, and adult education to develop the Performance Rating Scale for the Daughter/Son adult social role and for development of the Interview Protocol with which data for the study were gathered. Panels were adjusted for balance with regard to field of expertise, gender, and race/ethnicity. All panels were independent. No one served on more than one panel for the Performance Rating Scale, and no one served on more than one panel for the Interview Protocol development. This feature insured that that many experts contributed to the instruments' development. Classes of graduate students in adult education at the University of South Florida also critiqued instrument drafts and provided feedback and suggestions at many stages of instrument development.

Development of the Performance Rating Scale

The Performance Rating Scale was developed by a five-step process in which three panels of experts participate in the scale development. A Q Sort was one feature of the development of the Performance Rating Scale. The process consisted of the following five steps:

1. The researcher prepared a draft of the Performance Rating Scale. Review of the literature provided the basis for the draft. Key topics of research for developing a draft for the Performance Rating Scale for the Daughter/Son adult social role were adult education, human development and developmental psychology, family studies and the family life cycle, and the aging process and social work. The work of Havighurst (1957) and the developmental events for the child of aging parents social role in the Kansas City Study were the foundation for identifying potential strands for performance ratings. The research of Abney (1992/1993) and McCoy (1993/1994) provided contemporary information on the Daughter/Son adult social role. These studies also included information relevant to the Daughter/Son social role in a context broader than Havighurst's focus on the child's relationship to aging parents. Moreover, their research investigated the Daughter/Son social role during the early adult years as well as during middle and older adulthood; Havighurst's (1957) research did not include anyone under 40 years of age in his sample. A final version of the Performance Rating Scale is presented in Appendix C.

2. The draft was presented for feedback and comment to a graduate class of students in adult education at the University of South Florida. The group was introduced to the overall social roles project and to the particular purposes and goals of this study. This group was asked to serve as a preliminary review panel and respond to the draft in terms of the completeness of the Performance Rating Scale in addressing the domain of behaviors, attitudes, and activities represented within it, and the descriptors associated with five performance levels proposed in the draft. They were also asked to provide feedback on clarity of language, completeness of descriptive statements, and potential bias in wording that might skew the responses according to ethnicity, socioeconomic status, age, or gender. Revisions were made to the Performance Rating Scale reflecting the comments and suggestions received.
3. During the next step, a Pilot Panel of six experts from the fields of education, educational psychology, adult education, social work, and educational measurement and research completed two Q sorts of the Performance Rating Scale. In forming the panel, care was taken to balance the panel in terms of ethnicity, race, gender, and field of expertise. See Appendix D for a listing of the Pilot Panel members. Panel members were given index cards with individual performance descriptors on each card. They were asked to sort the descriptors into strands. After sorting the descriptors into strands, they then were asked to place them in order of performance rating from low to high. Feedback was also requested with regard to completeness of the descriptors,

clarity of language, and presence of bias in the wording. Based upon the results of the Pilot Panel, revisions were made to the Performance Rating Scale. Appendix E contains copies of the correspondence and instructions to the Pilot Panel for this process. For example, the wording on the levels of performance were changed, primarily for the below average and average levels. The word “occasional” was dropped from the Performance Rating Scale as the frequency indicator, and the word “rarely” was substituted.

4. The next step in the construction of the Performance Rating Scale was the formation of the Validation Panel. The panel consisted of 12 representatives of the disciplines of adult education, human development, educational measurement and research, and social work. Considerations of race, gender, and ethnicity also were taken into account in the selection of the panel members. See Appendix F for a list of Validation Panel members. The Validation Panel also performed a card sort in order to place the performance descriptive statement in the appropriate stands and to rank order the descriptive statements from high to low. The correspondence and instructions for this task are found in Appendix G. Revisions were made to the Performance Rating Scale reflecting panel feedback. For example, with regard to Involvement, amount of time in contact was added to the strand description, resulting in the behaviors included being frequency of contact, amount of time in contact, and involvement in decision-making of parents.

5. The final step in the development of the Performance Rating Scale was the review by the Verification Panel. The Verification Panel consisted of nine experts from the fields of adult education, human services, social work, and educational measurement and research. The first task of the Verification Panel was to rank order the descriptive statements for performance from high to low within strands. The second task involved rating the clarity, freedom from bias, and completeness of the behavioral descriptors in the Performance Rating Scale on a Likert scale. Based upon feedback from the Verification Panel, final revisions were made to the Performance Rating Scale. See Appendix H for Verification Panel members and Appendix I for the correspondence and instructions to the Verification Panel for the Performance Rating Scale. Again, frequency indicators in performance level descriptions were adjusted. “Some importance” was changed to “limited importance,” and “no or almost no satisfaction” with regard to role satisfaction was changed to indicate that the respondent expressed “no” satisfaction.

Development of the Interview Protocol

The Interview Protocol for the Daughter/Son adult social role was created for the purpose of collecting data from study participants. Through use of the Interview Protocol data, performance ratings were made for contemporary role behaviors associated with the adult Daughter/Son social role. A process of using experts in panels of progressive reviews and then critiquing by University of South Florida graduate students was utilized in the Interview Protocol development.

1. An initial item pool for the Interview Protocol was created by the researcher into a draft Interview Protocol. The item pool and strand identification were derived from review of the literature, Havighurst's (1957) findings, and Abney's (1992/1993) results. Based upon review of the University of South Florida Social Roles Research Project studies (Abney, 1992/1993; Barthmus, 2004/2005; Davis, 2002; Dye, 1998; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 2000; McCoy, 1993/1994; Montgomery, 1997/1998; Rogers, 2004/2005; Wall, 1997/1998; Witte, 1997/1998; Yates-Carter, 1997/1998), the interview item pool was organized into strands for Involvement, Perception, Activities, and Role Improvement.
2. Next, graduate students in adult education from the University of South Florida and several experts from previous panels reviewed the proposed questions and were asked for suggestions of other questions related to the strands or for clarifications. The Interview Protocol questions were revised based upon comments and suggestions from the class and the experts. One example of changes made to the Interview Protocol by the graduate students was to remove the original wording that described assistance given and received as "tangible" and "instrumental." Simpler, more descriptive wording was incorporated instead and examples added as prompts.
3. Next, a six-member Verification Panel (see Appendix J for a list of names) were asked to use a Likert scale to rate the revised questions in the Interview Protocol in terms of clarity and completeness. Areas of professional expertise

of this group were adult education, educational measurement and research, and human services. Further revisions were made based on suggestions and comments. A major shift was made to put types of involvement under the Activities strand rather than Involvement. Also, in attempting to ascertain information about amount of effort required for role performance, the question focus was changed to types and frequency of activities, with a follow-up question about the amount effort it required to engage in activities relative to the Daughter/Son role.

4. The researcher then administered the Interview Protocol to 10 respondents to determine ease of use of the proposed Interview Protocol. Minor wording changes were made in format and presentation.
5. The final step in the Interview Protocol development was receiving feedback and suggestions from a graduate class in adult education at the University of South Florida who were asked to administer the Interview Protocol to each other. Feedback from discussion and suggestions resulted in additional refinements to the instrument. More open-ended questions concerning Role Improvement were dropped in favor of direct questions about the types of information and the sources of that information that respondents had sought with regard to the Daughter/Son social role.

Field Test

The next step in the process of developing and content validating the Performance Rating Scale and Interview Protocol was to use the two instruments together in a field

test situation with a group of trained raters. Seven raters (see Appendix L for a list of names) from the fields of adult education, education, educational foundations, social work, and psychology were trained in the use of the Performance Rating Scale. They then rated completed interviews and also provided discussion and feedback on the rating process. On the basis of two rating sessions for rating and subsequent discussion, it was determined that the instruments were in the final form for use in a larger study. An addition suggested to improve the rating process was to develop guidelines specifically for rating Activities in terms of number and range of different activities. Guidelines for evaluating Role Improvement were also added at the suggestion of the panel. They participated in developing the guidelines as well. To gain further confirmation that the instruments were ready for use in the larger study, three members of the field test panel agreed to be interviewed with the Interview Protocol and to provide further feedback on the instrument. Their comments about the rating process and the use of the Interview Protocol on them as respondents affirmed that the instruments could be used in the exploratory investigation. Cohen's Kappa calculations were used to determine inter-rater reliability on this sample; analyses were performed on the final ratings.

Interviewer/Scorer Training

A trained team of interviewers and scorers was essential to reliable data collection for this research study. Training materials were developed and practice sessions held for anyone participating in the interviewing and scoring processes. Training included information about using the Demographic Data Form (see Appendix M for a copy of the complete form), the Informed Consent Form (see Appendix N for a sample form), the

Performance Rating Scale (Appendix C), and the Interview Protocol (see Appendix O for a copy of the Interview Protocol). Appendix P presents the Training Guide for using the Interview Protocol and the Performance Rating Scale for the Daughter/Son role.

Appendix Q provides the Guidelines for Evaluating Activities and Role Improvement.

The use of probes to encourage more complete information during the interview was an important part of the training of interviewers. Another feature of the training was to understand the sample criteria in order to interview only qualified participants. Training on determining SES level was particularly important since that is a multidimensional variable that sometimes required informed judgment. Interviewers were also introduced to the characteristics of the sample population in order to prepare them to identify potential respondents who met the criteria for some of the rarer respondents needed to fill the sample cells with a representative and diverse sample population. Interviewers who were trained to use the Interview Protocol were graduate students in adult education at the University of South Florida.

Training on the use of the Performance Rating Scale was provided to those who rated Interview Protocols. Agreement among raters was emphasized in the training of raters, and raters were allowed to rate Interview Protocols for the study only when raters demonstrated understanding of application of the Performance Rating Scale and were able to deliver ratings that were similar to performance scores of other raters.

Implementation of the Study

Population Sampling

This study followed the methods for obtaining a quota sample of study respondents.

Quota sampling involves the selection of typical cases from diverse strata of a population. The quotas are based on known characteristics of the population to which one wishes to generalize. Elements are drawn so that the resulting sample is a miniature approximation of the population with respect to the selected characteristics. (Ary et al., 1990, p. 177)

To determine the specific characteristics of a quota sample, census data were used. For the first part of the University of South Florida Social Roles Research Project, the 1990 census data for the Tampa Bay, Florida, greater metro area were used in all the social roles research studies prior to 2002; after the 2000 census data were available, Barthmus (2004/2005) and Rogers (2004/2005) revised the figures. The 2000 data were used to determine the quota sample for this study as well. The steps in determining the quota sample are defined by Ary et al. (1996).

1. Determine a number of variables, strongly related to the question under investigation, to be used as bases for stratification. Variables such as gender, age, education, and social class are frequently used.
2. Using census or other available data, determine the size of each segment of the population.
3. Compare quotas for each segment of the population that are proportional to the size of each segment.
4. Select typical cases from each segment, or stratum, of the population to fill the quotas. (p. 181)

All respondents included in the study had at least one living parent, step-parent, or parent-in-law or one who was deceased during the previous year. For this study, the respondents were drawn primarily from citizens from the Tampa Bay, Florida, area.

University of South Florida Social Roles Research Project studies completed after the 2000 U. S. census used the percentages based on the percentages derived from that data. Those percentages were 10.7% Black/African-American, 11.3% Hispanic/Latino, 2% Asian, and .7% Native American Indian; 75.3% were white/Caucasian (Barthmus, 2004/2005).

The quota sample consisted of 150 respondents to be equally distributed among 30 cells (2 gender x 5 SES x 3 age groups), as indicated in Table 13.

Table 13

Quota Sample Configuration of Cells

SES Level	Young		Middle		Older	
	M	F	M	F	M	F
	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>
Disenfranchised	5	5	5	5	5	5
Working	5	5	5	5	5	5
Lower Middle	5	5	5	5	5	5
Upper Middle	5	5	5	5	5	5
Elite	5	5	5	5	5	5

Note: *N* = 150

The respondents of the four minority groups (African-American, Hispanic/Latino, Asian, and Native American Indian) were distributed among cells, with each cell

containing one minority respondent; one exception is that six cells had two minorities in order to include the numbers of minorities (36) required for representativeness in the quota sample.

The study variables were distributed among the cells equally for each variable. The gender variable was evenly distributed among males and females ($n = 75$ males, $n = 75$ females). The age variable categorized the quota sample into three groups: young (18-34 years of age); middle (35-64 years of age); and older (65+ years of age). For each age group, $n = 50$.

The socioeconomic variable consisted of five status levels. The levels used in this study were those identified by James and Abney (1993) and have been used by all the adult social roles studies of the University of South Florida Adult Social Roles Research Project. In the James and Abney construction of SES levels, a multidimensional approach was used to develop a multi-factor socioeconomic status measure. The three dimensions of occupation, education, and income were combined to determine the SES level. Five levels were defined: disenfranchised, working, lower middle, upper middle, and elite. For the University of South Florida Adult Social Roles Research Project, those respondents selected for the study were respondents whose SES level was consistent across dimensions (i.e., occupational status, educational level, and income level varied no more than one level on one dimension).

According to the James and Abney (1993) model for SES level, occupational status was determined by using the Nam and Powers ratings for occupational status. Occupations were ranked based upon social status and prestige and assigned point values

ranging from 1 to 100. Occupations were then grouped into five levels. These occupational scores are found in Appendix A. The Nam-Powers-Boyd Occupational Status Scores for 2000 listed by occupation point values assigned to each occupation, and placement of each occupation in one of five levels. James and Abney (1993), using the Nam and Terrie (1988) groupings of occupations, placed the five levels of occupational prestige and status into their disenfranchised (Level 1), working (Level 2), lower middle (Level 3), upper middle (Level 4), and elite (Level 5,) categories. Each of the three components of SES level are presented in the next tables. Table 14 summarizes a broad categorical description for each level, indicates the score range for each level, and provides the estimated percentage of the U.S. population falling in that level. The largest percentage of the population fell under Level 2 (factory and clerical workers), which accounted for many different assembly-line jobs.

Educational level in the James and Abney (1993) model was determined by the number of years of formal education achieved. Five educational levels were described, corresponding to the five SES levels: disenfranchised, working, lower middle, upper middle, and elite. Table 15 indicates the educational levels by educational attainment and percentage of the population.

The income dimension of the multi-factor socioeconomic status measure (James & Abney, 1993) was determined by family income. Again, income was arranged in five categories (disenfranchised, working, lower middle, upper middle, and elite). This information was gathered on the Demographic Information form and was an

Table 14

Occupational Levels by Category, Score Range, and Estimated Percentage of Population

Level	Occupational Category	Score Range	Est. % of US Population
1	Unskilled Laborers/ Private Household Workers	1 – 9	16
2	Operators/Fabricators/ Clerical/Service Workers	10 – 65	39
3	Sales/Craftsman/ Precision Workers	66 – 87	20
4	Managers/Administrators/ Professionals	88 – 98	20
5	Executives/Elite Professionals	99 – 100	5

Note. From James & Abney, 1993, p. 43. Reprinted by permission.

important piece of information to screen eligible study participants. The income levels are presented in Table 16.

Abney (1992/1993) used the James and Abney (1993) socioeconomic status measure to distinguish the five SES groups used in her study and all subsequent University of South Florida Adult Social Roles Research Project studies.

1. *Disenfranchised* (comprising about 15% of the U.S. population) are regarded as lowest status and include the poor, unskilled, homeless, and illiterate.
2. *Working* (comprising about 35% of the population) are described as manual laborers or blue collar workers.

3. *Lower Middle* (about 25% of the population) are described as average income individuals such as nurses, teachers, small-business operators, and middle management.
4. *Upper Middle* (consisting of about 20% of the population) are usually active community leaders, professionals or proprietors of large companies.
5. *Elite* (about 5% of the population) include prosperous old wealth or nouveau riche families who can make decisions of major community consequences. Professions of high status such as doctor or lawyers are included here. (Kirkman, 1994/1995, pp. 56-57)

Table 15

Education Levels by Educational Attainment and Estimated Percentage of Population

Level	Educational Attainment	Est. % of US Population*
1	Less than High School	24
2	High/Vocational School	39
3	2 Years College	19
4	College/Graduate Graduate School up to Doctorate	15
5	Doctoral/Professional Degree	4

Note. From James & Abney, 1993, p. 43. Reprinted by permission.

* May not equal 100% due to rounding.

Table 16

Family Income Levels by Income Range and Estimated Percentage of Population

Level	Pre-2002 Income Range	Est. % of US Pop.	Updated Income Range	Est. % of US Pop.
1	under \$10,000	15	under \$15,000	15
2	\$10,000 – 24,999	28	\$15,000-\$34,999	25
3	\$25,000 – 49,999	33	\$35,000-\$99,999	35
4	\$50,000 – 99,999	20	\$100,000-\$124,999	20
5	over \$100,000	4	\$125,000+	5

Source: James & Abney, 1993, p. 42; Rogers, 2004/2005, p. 81. Reprinted by permission.

Data Collection

Data collection was completed by trained interviewers and raters primarily at various locations in the metro Tampa Bay, Florida, area, but some were obtained from other locations in the U. S. Some respondents were interviewed in places of work or in their homes. Others were solicited from community organizations serving populations where it might be expected to find persons fitting the demographic requirements for the quota sample. Such sites were senior service centers or retirement living centers, the Salvation Army centers or homeless shelters. In some cases, referrals to persons of certain demographic characteristics were obtained from reliable sources such as friends or professional colleagues.

The first step in the interview process was to complete the Informed Consent Sheet (Appendix M) with the participant and to explain the purpose of the study. The

respondent was also asked to indicate approval to have the interview tape recorded on the Informed Consent Sheet.

Next, a Demographic Information Sheet (Appendix N) was completed to determine if the respondent met the demographic requirements for the quota sample characteristics. If not, the interviewers thanked the respondent and concluded the interview at that time. Since the study participants comprised a quota sample of 30 cells with specific demographic characteristic requirements, determining if a respondent met the requirements for inclusion in a cell was important in order not to waste the time of the interviewer or the interviewee. Additionally, once sufficient interviews to complete the requisite number of interviews for any given cell were obtained, that cell was closed for further interviewing.

Each interviewer was assigned a unique code to indicate who conducted the interview on each Interview Protocol. Additionally, each respondent was given a unique identifier that consisted of the interviewer's initials followed by the respondent's unique number, usually the place in the sequence of interviews conducted by that particular interviewer. For example, the fifth interview conducted by Interviewer XY would be labeled XY105. By using such a method of respondent identification, it was possible to distinguish individual interview data while maintaining relative anonymity; only the Informed Consent Sheet could link the respondent's name to the subsequent information obtained on the Demographic Information Sheet. Each set of papers had the same identification numbers.

Once the Informed Consent Sheet, the Demographic Information Sheet, and the Interview Protocol were completed and it was confirmed that the respondent met the demographic requirements for inclusion in the study, the Interview Protocol was rated. This rating was given according to the Performance Rating Scale by the at least two trained raters, who had to be of the opposite gender from each other. This gender-opposite provision was initiated to guard against gender bias in the ratings. If there was consensus regarding performance level between the two raters (i.e., both raters indicated a rating within a single performance level) then the information was recorded as complete, with the average of the two scores being the Performance Rating Score for that respondent. The decision “point” was based on the five levels of the Performance Rating Scale, where 0-1 is low, 2-3 is below average, 4-5 is average, 6-7 is above average, and 8-9 is high. Two scores within a level were averaged.

If there was no agreement on the rating but the ratings were only one performance level apart, a third rater was asked to rate the interview. If that rater’s score matched the performance level rating of the first rater of the opposite gender, then the third rater’s score became the second performance rating score for that respondent. If the third rater’s score did not match the performance level of either of the first two raters, a fourth rating was solicited from a rater of the opposite gender of the third rater, to see if the fourth raters could come to consensus on the performance rating score of a rater of the opposite gender. In cases where there was no opposite gender agreement among the four raters on performance level ratings, the interview was presented to the primary researchers to try to gain consensus. If consensus was not attained, the interview was eliminated. Ratings for

interviews included in the study were recorded by the researcher in a database of performance rating scores. This database was used for data analysis when all cells in the quota sample were filled.

Data Analysis

Data analysis of the results of the quota sample related to the research questions were performed using an analysis of variance based on a 2 (gender) x 5 (SES level) x 3 (age level) factorial design. Main effects and possible interaction effects of variables were determined. A Tukey post hoc test was used to discern patterns within the study's variables. Data were also described using descriptive statistics such as measures of central tendency to present summary data on the study data results. Statistical power was calculated to indicate the probability that the tests of statistical significance used in this study would lead to a correct rejection of a null hypothesis, reducing the probability of a Type I error.

The *power* of an experiment refers to the statistical ability to reject a null hypothesis when it is, in fact, false. This power is a function of the size of the sample, the heterogeneity of the subjects with reference to the dependent variable, the reliability of the measuring instruments used, the nature of the statistical procedure used to test the hypothesis, as well as effect size. (Ary et al., 1996, pp. 530-531)

Analysis of variance (ANOVA) was used to determine if other secondary variables of interest showed significance as contributors to role performance differences. Because this study included an exploratory investigation and one of the research questions included in the study asked if there if there were activities related to performance of the Daughter/Son social role suggested by the respondents that were not

related to the aging and increasing dependency of parents (Research Question #5), data from open-ended responses were collected from the Interview Protocol. Activities were grouped according to content; frequency was reported. Correlations of data regarding degree of relationship of the parent to the respondent (biological parent versus step-part, for example) and distance between where the respondent and her/his parent lived, and the parent's health were also analyzed for correlation with an ANOVA calculation.

Since the purpose of this study was the content validation of a Performance Rating Scale and Interview Protocol for the Daughter/Son adult social role, the procedures for achieving content validity were critical to the success of this study. Validity for an Interview Protocol is a measure of the extent to which "the interview or questionnaire is really measuring what it is supposed to measure" (Ary et al., 1990, p. 434). In this study, panels of experts were used to develop both the Performance Rating Scale and the Interview Protocol. Ratings of items were reported in terms of rating levels in each category of response and the frequency of each rating level.

Scoring of the interviews was dependent upon judgments of raters related to open-ended verbal responses in order to achieve a performance rating score. With this type of instrument, both inter-rater and intra-rater reliability are needed to assure stable results. Inter-rater reliability is "the extent to which two or more observers produce similar quantitative results when observing the same individual during the same time period. (Ary et al., 1996, p. 569). To assure that inter-rater reliability from the field test was reflected or exceeded by the final scores from the study's quota sample, 12 interviews were drawn from the study population. The 12 chosen included ratings that had the most

diversity of final score. Taking the group for which there was the least agreement among the four raters assured that the lowest reliability of the sample would be known. A Cohen's Kappa was used again to determine inter-rater reliability for this group. Intra-rater reliability was also calculated for this group with a Pearson's product moment analysis.

Summary

This study developed and content validated a Performance Rating Scale and Interview Protocol for the Daughter/Son social role. It was a part of a larger research project to update Havighurst's mid-20th Century studies of adult social roles. The research design used a quota sample drawn largely from the Tampa Bay, Florida, area. A series of expert panels assisted in the development of the instruments and to content validate them; graduate students in adult education at the University of South Florida also critiqued the instruments and provided suggestions and feedback.

After field testing and revising the instruments, 150 qualified respondents were interviewed by trained interviewers and their responses scored by trained raters in order to determine a performance rating on the Daughter/Son social role. Data analysis was performed in order to accomplish the following research objectives:

1. To content validate a Performance Rating Scale for the Daughter/Son adult social role in order to enable researchers to assess the role performance of individual adults across the life span.

2. To content validate an Interview Protocol for the adult social role of Daughter/Son in order that reliable distinctions can be made about the role performance of individuals.
3. To implement the use of the Performance Rating Scale and the Interview Protocol in a study of a quota sample of subjects primarily in the Tampa Bay, Florida, area, but including some respondents from South Carolina and elsewhere.
4. To generate data from the exploratory study about the Daughter/Son role performance that will suggest further research possibilities and, in particular, will suggest research related to developmental tasks across the life span that are unrelated to care for an aging parent..

Related to research objective #4 above, the data generated were analyzed for the following research questions regarding Daughter/Son social role performance:

1. Are there age-related differences in adults' performance of the Daughter/Son social role?
2. Are there gender-related differences in adults' performance of the Daughter/Son social role?
3. Are there socio-economic status differences in adults' performance of the Daughter/Son social role?
4. Are there interaction effects between the age, gender, and socio-economic status variables related to adults' performance of the Daughter/Son social role?

5. Are there activities related to performance of the Daughter/Son social role suggested by the respondents that are not related to the aging and increasing dependency of parents?
6. Are there other significant variables that influence Daughter/Son social role performance?

To verify further the validity of the instruments, the following hypotheses were also tested:

1. There are gender-related differences in adults' performance of the Daughter/Son social role, with daughters performing at higher levels.
2. There are socio-economic status differences in adults' performance of the Daughter/Son social role.

CHAPTER 4

RESULTS

The purpose of this study was to construct and content validate a Performance Rating Scale and Interview Protocol for the contemporary Daughter/Son adult social role. This chapter presents (a) the development and content validation of the Performance Rating Scale, (b) the development and content validation of the Interview Protocol, (c) the implementation of the Performance Rating Scale and Interview Protocol, and (d) the results of the collection of data on 150 participants..

The research questions addressed in this study were:

1. Are there age-related differences in adults' performance of the Daughter/Son social role?
2. Are there gender-related differences in adults' performance of the Daughter/Son social role?
3. Are there socio-economic status differences in adults' performance of the Daughter/Son social role?
4. Are there interaction effects between the age, gender, and socio-economic status variables related to adults' performance of the Daughter/Son social role?
5. Are there activities related to performance of the Daughter/Son social role suggested by the respondents that are not related to the aging and increasing dependency of parents?

6. Are there other significant variables that influence Daughter/Son role performance?

Two research hypotheses were also tested in this study.

1. There are gender-related differences in adults' performance of the Daughter/Son social role, with daughters performing at higher levels.
2. There are socio-economic status differences in adults' performance of the Daughter/Son social role.

Development and Content Validation of the Performance Rating Scale

The construction and development of the Performance Rating Scale began with the researcher's draft of strand definitions and performance descriptors appropriate for each strand. Definitions of the strands and behavioral descriptors were constructed based upon the literature review. University of South Florida graduate students in adult education reviewed the preliminary scale, and revisions were made from the review. The next step was to subject the revised behavioral descriptors to a series of panel reviews by experts from education, adult education, educational measurement and research, human development and human services, and social work. A pilot panel of experts reviewed the Performance Rating Scale and provided information for revisions. That review was followed by a validation panel of experts' review of the behavioral descriptors for association with the strand and to confirm performance level descriptions within each sub-strand cluster of performance descriptions. Performance descriptors next were reviewed by a Verification Panel for association with level of performance. The Verification Panel (Appendix I) also rated each descriptor for clarity and completeness of

the statement. Graduate students in adult education at the University of South Florida provided review and feedback throughout the process as well.

Pilot Panel

A Pilot Panel of six experts drawn from education, educational psychology, adult education, social work, and educational measurement and research. See Appendix D for names of Pilot Panel members. These experts completed two card sorts. The panel was also diverse in terms of gender and race/ethnicity. In Task A, each performance descriptor statement was written on an index card. Each panel member was given four envelopes, each marked with a strand name and definition; the panel member was then asked to place each index card in the envelope with which he/she thought it was most logically associated. Task B was to rank the performance descriptors for each sub-strand cluster of descriptors from low to high. Each panel member received envelopes with five index cards with performance descriptors for one sub-strand placed in it in random order. Each panel member was asked to place the index cards in rank order from lowest to highest level of performance and then return the index cards to that sub-strand's envelope. See Appendix E for correspondence and instructions to the Pilot Panel.

Tabulation of the results of the Pilot Panel's work indicated that on Task A, 382 out of 390, or 97.95%, of performance descriptors were placed with their proper strand. Comments provided by the panel members helped to clarify particular wordings that were problematic. Most of the sorting mistakes were self-evident with regard to the cause for confusion; a few were judged to be random.

Results for Task B, the rank ordering of performance descriptors within sub-strands, resulted in an overall correct response rate of 98.97%, with 386 of 390 correct responses. In some cases, consistent intra- and inter-rater mistakes were identified. New language was developed to address the noted problem areas. Word choices for describing frequency of contact with regard to Involvement were most often a source of mistakes; the word “occasionally” was dropped from use as a descriptor, for example

Validation Panel

Revisions to the performance descriptors were completed and submitted to the next round of review, the Validation Panel, listed in Appendix F, with instructions similar to the Pilot Panel’s. The Validation Panel consisted of 12 experts from adult education, educational measurement and research, human development, and gerontology. Panel members were chosen for diversity of field of study, gender, and race/ethnicity. The composition of the Validation Panel was non-duplicative of the Pilot Panel membership.

The Validation Panel was given the same two card-sort tasks as the Pilot Panel, but with performance descriptors revised, based upon the results of the Pilot Panel. The same process instructions were provided to the Validation Panel members (Appendix F). In Task A, each performance descriptor statement was written on an index card. The panel member was given four envelopes, each marked with a strand name and definition; the panel member was then asked to place each index card in the envelope with which he/she thought it was most logically associated. Task B was to rank the performance descriptors for each sub-strand cluster of descriptors from low to high. The panel member received envelopes with five index cards with performance descriptors randomly

ordered. The panel member was asked to place the index cards in rank order from lowest to highest level of performance and then return the index cards to that sub-strand's envelope.

Tabulation of the results of the Validation Panel's work indicated that 95.1% (742 of 780 responses) of the responses for Task A correctly associated the performance descriptor with its strand. Some sorting mistakes were obvious about the cause for confusion, and some misplacements were judged to be random.

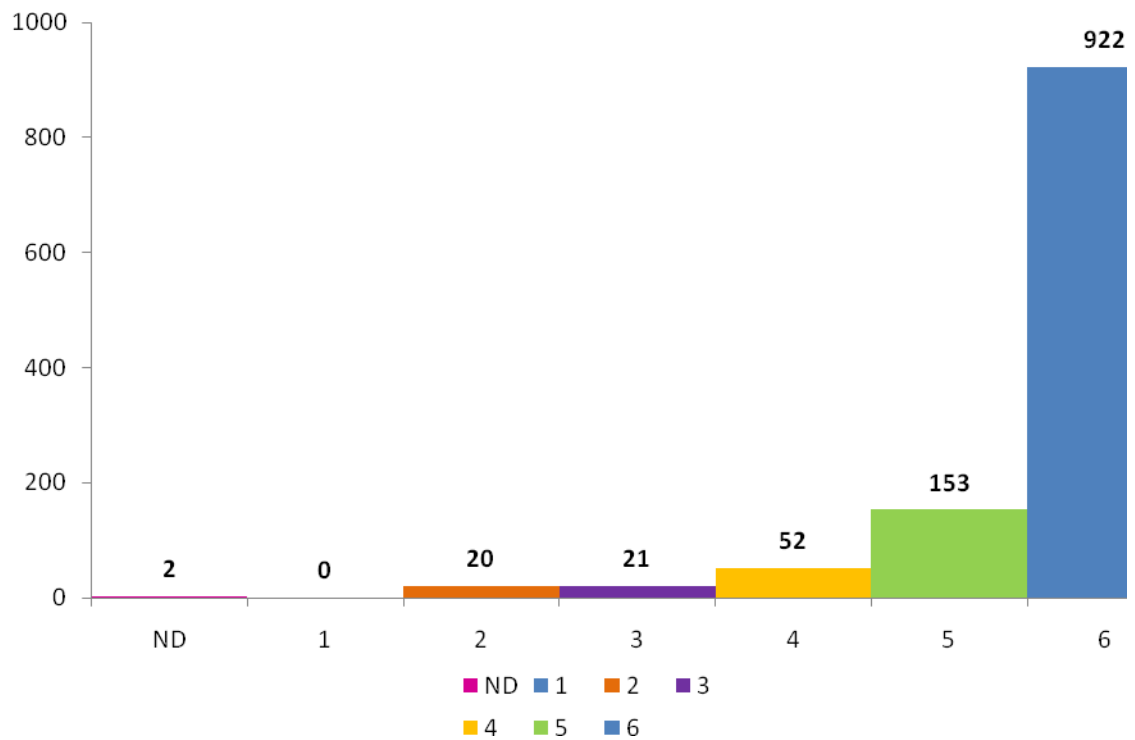
Results for Task B, the rank ordering of performance descriptors within sub-strands, resulted in an overall correct response rate of 99.0%, with 772 of 780 correct responses. A few consistent intra- and inter-rater mistakes were identified, and revisions were again made to the problematic performance descriptors. Word.

Verification Panel

The third round of the Performance Rating Scale development process was the submission of the performance descriptors to the Verification Panel, a nine-person panel of experts drawn from adult education, gerontology, human services, and educational measurement and research. See Appendix G for names of the Verification Panel. This panel also was chosen to be diverse in background, gender, and race/ethnicity; the panel did not duplicate any member of previous panels. Task A given to the Verification Panel was a card sort similar to the Task B card sort performed by the Pilot Panel and the Validation Panel. See Appendix H for instructions provided to the Verification Panel. Verification Panel members were given 13 envelopes with five cards containing five index cards, each containing a performance descriptor associated with a sub-strand. The

cards were randomly placed in the envelope. The panel was asked to rank order the five performance descriptors from lowest to highest performance and return the ordered index cards to their sub-strand envelope. The results of the Q sort were that panel members identified the correct performance level for a specific descriptor 90.8% of the time.

Task B of the Verification Panel was to rate each performance descriptor on a Likert-type scale for completeness of the statement and the clarity of the statement. Possible scores ranged from 1 to 6, with 1 being the lowest score and six indicating the highest score. Panel members were also asked for comments and suggestions. Results of the Verification Panel evaluation indicated that 91.9 % of performance descriptors (1075 out of 1170 items) received scores of 5 or 6. Evaluation of statement completeness resulted in 92.9% of items receiving evaluations of 5 or 6, and evaluation of statement clarity resulted in 91.0% of items receiving scores of 5 or 6. Results of the verification Panel are displayed in Figure 2. Those performance descriptors with scores for completeness or clarity of 4 or less were evaluated individually, with special attention given to comments and suggestions noted. For example, one rater consistently assigned low marks to performance statements including the phrase “little or no”; he wanted the “no” eliminated from the statement, but experience with previous social roles studies had shown that absence of a “no” statement in the low performance descriptors was a concern to raters. In many cases, the panel members indicated that more detail or an operational clarification was needed; these concerns were addressed in the construction of the Interview Protocol and in the Field Testing phases of the process. A major revision was prepared, based upon Verification Panel feedback, with the sub-strand, description for



ND = No Data; 1 – 6 Represents Verification Panel members’ scores ranging from 1 – 6, with 1 being low (statement is very unclear and not complete) and 6 being high (statement is very clear and very complete).

Figure 2. Verification Panel scores rating the clarity and completeness of Performance Rating Scale for the Daughter/Son adult social role.

Role Improvement changed to Amount of Effort Expended to Acquire New Information or Skills Intended to Improve Role Performance.

Interview Protocol Development and Content Validation

The Interview Protocol for the Daughter/Son adult social role was created for the purpose of collecting data from study participants. Through use of the Interview Protocol

data, performance ratings were obtained for contemporary role behaviors associated with the adult Daughter/Son social role.

Based upon review of the literature, Havighurst's (1957) findings and Abney's (1992/1993) results a potential item pool was created. Next, after reviewing the University of South Florida Social Roles Research Project studies (Abney, 1992/1993; Barthmus, 2004/2005; Davis, 2002; Dye, 1998; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 2000; McCoy, 1993/1994; Montgomery, 1997/1998; Rogers, 2004/2005; Wall, 1997/1998; Witte, 1997/1998; Yates-Carter, 1997/1998), the interview item pool was organized into strands for Involvement, Perception, Activities, and Role Improvement. Potential items had also been suggested by spontaneous comments from panel members at all stages of the Performance Rating Scale development, and these suggestions were reviewed to inform the question development and selection.

An initial Interview Protocol was prepared and presented to a graduate class of adult education students at the University of South Florida. The students were asked to administer the initial Interview Protocol to each other and then provided feedback through class discussion of the instrument. Question wording, question content, and ease of administration of the Interview Protocol were discussed. Several changes were made to the draft Family Demographic Form from this feedback, including more code options for some characteristics and rewording some options (health descriptors, for example). Based on this process, revisions were made to the draft Interview Protocol. An example is that "Finding information or resources for the parent" was added to the grid in Question 17. Additional prompts were also suggested as a way for providing more

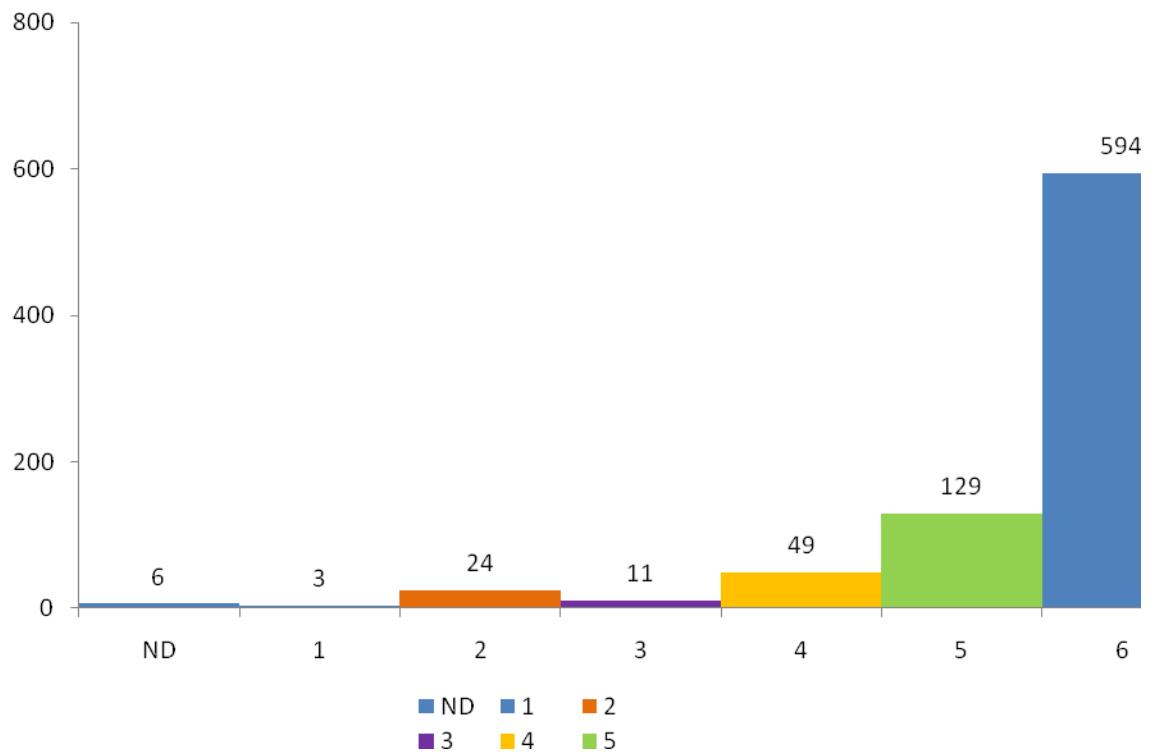
guidance for the interviewer if she/he needed to stimulate the participant's thinking about a question.

The next step was to submit the Interview Protocol to a Verification Panel of six experts from adult education, educational measurement and research, and human services, listed in Appendix I. Panel members were asked to provide feedback on clarity and completeness of the questions by rating each question on a Likert-type scale with values of 1 to 6, with low being the lowest value and 6 being the highest value. See Appendix J for instructions and correspondence to the Interview Protocol Verification Panel. The panel results indicated that 90.0% of the total items received a rating of 5 or 6. On the items related to clarity of the question, 90.1% of items were rated 5 or 6; on the items related to completeness of the question, 89.8% received ratings of 5 or 6. Figure 3 depicts the results. Results and comments were used to make additional refinements to the questions. One major change was that several forced-choice options were changed to an open-ended format in order to allow more flexibility in responses.

Field Test

The field testing of the Performance Rating Scale and the Interview Protocol as companion instruments began with the administration of the Interview Protocol to eight persons and assembling and training a group of seven raters. The group of raters (Appendix K, Field Test Panel) from the fields of adult education, education, educational foundations, social work, and psychology were trained in the use of the Demographic Form, (provided in Appendix L), the Informed Consent Form (see Appendix M), and the

Performance Rating Scale to rate role performance of the Daughter/Son social role. In two sessions of rating and discussion, eight Interview Protocols were presented for rating, and then each was discussed thoroughly to clarify processes and instrument use. Ratings were recorded



ND = No Data; 1 – 6 Represents Verification Panel members’ scores ranging from 1 – 6, with 1 being low (statement is very unclear and not complete) and 6 being high (statement is very clear and very complete).

Figure 3. Verification Panel scores rating the clarity and completeness of Interview Protocol for the Daughter/Son adult social role.

and analyzed for the final performance score on each Interview Protocol. In the discussion, the scoring of the Activity area was a particular area of difficulty. After scoring several interviews, guidelines giving numeric thresholds for Activity levels were developed by the group. Once these guidelines were provided, raters scored this area more consistently. Cohen's Kappa was used to determine final performance rating score inter-rater reliability. Inter-rater reliability results for the field test in Table 17. It can be seen from Table 17 that one rater had lower correlation scores than others. Additional training and provision of the guidelines resulted in his later ratings being consistent with other raters. See Appendix N for the final Interview Protocol, Appendix O for the Training Guide, and Appendix P for the Guidelines for Evaluating Activities and Role Improvement. While some editorial adjustments to both instruments were made as a result of the field test, the primary addition was the Guideline Sheet for raters.

To gain further information about the instruments, three members of the field test panel agreed to be interviewed with the Interview Protocol and to provide further feedback on the instrument. Their comments about the rating process and the use of the Interview Protocol with them as respondents affirmed that the instruments could be used in an exploratory investigation.

The Study

Data Collection

This study was a content validation study of a quota sample of 150 participants chosen according to specific demographic criteria. A 2 x 5 x 3 research design yielded

Table 17

Field Test Inter-rater Reliability and Agreement for the Daughter/Son Social Role

Assessor	Rater 1 <i>r</i>	Rater 2 <i>k*/r</i>	Rater 3 <i>k*/r</i>	Rater 4 <i>k*/r</i>	Rater 5 <i>k*/r</i>	Rater 6 <i>k*/r</i>	Rater 7 <i>k*</i>
Rater1 ^a	1.00	0.13	0.02	0.22	-0.01	-0.29	0.09
Rater 2	0.38	1.00	0.20	0.48	0.48	0.00	0.33
Rater 3	0.00	0.48	1.00	0.00	0.65	0.07	0.33
Rater 4	0.63	0.71	0.19	1.00	0.08	-0.27	0.09
Rater 5	-0.18	0.61	0.81	0.11	1.00	0.23	0.23
Rater 6	-0.53	-0.26	0.25	-0.59	0.25	1.00	0.33
Rater 7	-0.35	0.27	0.76	0.00	0.51	0.50	1.00

Note. $N=8$

* *Reliability estimates are below diagonal. Kappa estimates are above.*

^a Because the scores for Rater 1 were unbalanced in configuration and were not calculated by SAS, simple Kappas were calculated for all pair-wise comparisons for this rater.

30 unique cells comprised of combinations of two gender categories, five socioeconomic categories, and three age categories. Additionally, study criteria required that each cell should have at least one member of a minority population in proportion to minority population distribution in the Tampa Bay area of Florida, in the 2000 census. Table 18 presents the distribution of the quota sample into cells. The quota sample included 15

African-Americans, 17 Hispanics, 3 Asians, and 1 Native American, for a total of 36 minority study participants. Six cells, therefore, had two minorities.

A three-way ANOVA calculated variance among the independent variable of age, gender, and socioeconomic status on the study sample. A Tukey's test after the ANOVA produced multiple comparisons to determine if any means for variable levels were significantly different from each other. Main effects for the three primary independent variables revealed that gender was the only variable found to be significant ($p < .05$), with females performing at a statistically significantly higher level than males. Calculations of p levels of statistical significance for other variables and interaction effects were not significant in this study, while gender differences in performance are solidly within the $p < .05$ level, indicating less than 5% probability that the results occurred due to chance. Table 19 provides the descriptive statistics for the study group, and Table 20 displays summary data for the ANOVA. Table 21 reports the descriptive data for the gender main effect.

Analysis of the descriptive data for the final Daughter/Son performance rating scores in Table 21 indicates that the overall mean score of 5.97 falls in the high Average level of performance, approaching the low Above Average level of rating. This statistic confirmed that the overall functioning of the Performance Rating Scale and Interview Protocol produces overall average scores at a performance level which the Performance Rating Scale defined as Average.

The Mean score of 5.97 for the Daughter/Son social role with final performance scores from other social roles indicates that it is the fourth highest mean of all the adult

social roles, with Parent ($M=6.73$) (Kirkman, 1994/1995); Davis 2002), Worker ($M=6.47$) (Kirkman, 1994/1995; Davis, 2002)), and Spouse/Partner ($M=6.43$) (Kirkman, 1994/1995; Davis 2002) ranking higher. Open-ended remarks from respondents confirm a ranking at this approximate level; many volunteered that their own spouse and children came ahead of parents in terms of the level of importance in their lives; nonetheless 52.67% indicated that being a Daughter/Son is in the top three things they do with their lives now. See Table 22 for Daughter/Son rating of role importance in their lives.

Table 18

Racial/Ethnic Distribution of Daughter/Son Social Role Respondents by Cell

	Young <u>18-34 years</u>		Middle <u>35-64 Years</u>		Older <u>65+ years</u>		Total <i>n</i>
	Male	Female	Male	Female	Male	Female	
	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>	<i>n</i>	
Disenfranchised	1B 4W	1B 1H 3W	1B 4W	1B 4W	1B 1H 3W	1H 1NA 3W	30
Working	1H 4W	1B 4W	1B 4W	1B 1H 3W	1H 4W	1H 4W	30
Lower Middle	1A 4W	1H 4W	1H 4W	1B 4W	1B 4W	1H 4W	30
Upper Middle	1B 1A 3W	1B 4W	1B 1H 3W	1B 4W	1H 4W	1H 4W	30
Elite	1H 4W	1A 4W	1H 4W	1B 4W	1H 4W	1H 4W	30

Note. B=African-American H=Hispanic A=Asian NA=Native American W=White

Table 19

Descriptive Statistics for the Final Performance Score for the Daughter/Son Social Role

Location		Variability	
Mean	5.97	Standard Deviation	1.86
Median	6.5	Variance	3.47
Mode	7.0	Range	0.5-9.0
		Interquartile Range	2.38

N=150

Table 20

Three-Factor ANOVA Summary Table for Final Daughter/Son Social Role Scores

Source	df	Sum of Squares	Mean Square	F	p
Age	2	11.41	5.71	1.66	0.1953
Gender	1	15.04	15.04	4.37	0.0388
SES	4	11.12	2.78	0.81	0.5230
Age x Gender	2	0.82	0.41	0.12	0.8875
Age x SES	8	28.36	3.54	1.03	0.4184
Gender x SES	4	5.68	1.42	0.41	0.7995
Age x Gender x SES	8	31.18	3.90	1.13	0.3475
Error	120	413.50	3.45		
Corrected Total	149	517.12			

Note: N=150 $p < .05$

Table 21

Means and Standard Deviations of Final Daughter/Son Scores by Gender

Gender	<i>n</i>	<i>M</i>	<i>SD</i>
Male	75	5.65	1.99
Female	75	6.29	1.67

Note. *N*=150; Score range is 0-9.

Table 22

Frequency of Rating of Daughter/Son Role Importance in Respondents' Lives

Level of Importance	<i>n</i>	%
Most Important thing I do with my life now.	12	8.00
In top three things I do with my life now.	79	53.67
About in the middle of all the things I do with my life now.	44	29.33
Not a very important part of the things I do with my life now.	11	7.33
Not important at all compared to other things I do with my life now.	4	2.67

N=150

Though only the main effect for gender was significant, examination of means and standard deviations for the final score reveals patterns. See Table 23 for means and standard deviations of the final score. Consistent with Abney's finding (1992/1993) that young respondents rated their role as an adult child very highly, the highest mean score, at 6.33, was for the young age category. The standard deviation for the young respondents was the lowest of the three groups (1.49), indicating that the young age category in this study had a relatively consistent response around the above average performance level. It can also be noted that in this study, the mean score diminished as the respondents became older. The middle age group had a mean score of 5.92, and the older age category a mean of 5.66. Standard deviations increased with age; the middle age category had a standard deviation of 1.79, and the older age category's standard deviation was 2.21.

Inter-Rater and Intra-Rater Reliability

Because the scores in this study are made upon the basis of the judgments of trained raters, the stability of the raters' application of the Performance Rating Scale to the Interview Protocol over time was important to the confidence of the performance rating outcomes. To enhance the confidence in the reliability of the instruments, as a part of the exploratory investigation, a group of 12 scores were examined for inter-rater and intra-rater reliability. The 12 included the Interview Protocols that had the greatest diversity of rater response, (i.e., the greatest amount of rater disagreement). By choosing this group, the lowest level of reliability could be determined.

Table 23

Means and Standard Deviation of Final Daughter/Son Scores by Gender, Age Category, and SES Level

Gender	Age	SES Level	<i>n</i>	Mean	<i>Std. Dev</i>
Male	Young	Disenfran.	5	5.10	1.95
		Working	5	7.30	1.40
		Lower Mid.	5	5.30	1.96
		Upper Mid.	5	5.80	1.75
		Elite	5	6.90	0.65
	Middle	Disenfran.	5	5.50	1.41
		Working	5	4.40	1.47
		Lower Mid.	5	6.60	0.89
		Upper Mid.	5	5.90	1.19
		Elite	5	5.80	3.27
	Older	Disenfran.	5	5.50	2.92
		Working	5	5.40	2.27
		Lower Mid.	5	4.70	3.27
		Upper Mid.	5	5.00	2.35
		Elite	5	5.60	1.64
Female	Young	Disenfran.	5	5.80	1.04
		Working	5	6.10	1.88
		Lower Mid.	5	6.90	1.02
		Upper Mid.	5	7.40	0.82
		Elite	5	6.70	0.45
	Middle	Disenfran	5	7.00	2.52
		Working	5	5.70	1.99
		Lower Mid.	5	7.00	1.00
		Upper Mid.	5	5.30	1.57
		Elite	5	6.00	1.17
	Older	Disenfran.	5	4.30	3.11
		Working	5	6.40	2.27
		Lower Mid.	5	6.80	0.76
		Upper Mid.	5	6.10	1.71
		Elite	5	6.80	0.75

N=150 Note: Score range is 0 to 9.

Each performance level (Low, Below Average, Average, Above Average, and High) of the Performance Rating Scale had two scores within it, representing the high and the low ends of the range; for example, the Average performance level was represented by a score of either 4 or 5. A rating was considered complete when two raters of opposite genders rated an Interview Protocol in the same performance level category. Therefore, inter-rater reliability calculations were calculated based upon performance level within which their scores fell, and data are presented in two formats. The performance score levels uses the 0-9 point scale in which the Interview Protocols were originally scored. Because the scale is divided into five levels with a low and a high score in each level, scores were converted to a 1-5 scale. Table 24 and Table 25 display inter-rater reliability data. Inter-rater reliability was calculated using a weighted Cohen's Kappa, except that, simple Kappas were reported for one rater and the pair-wise comparisons for that rater because of unbalanced score cells that could not be calculated by SAS to obtain a weighted Kappa. Those scores are noted in the tables. Intra-rater reliability was obtained by using a Pearson product moment statistic to compare two different scores from the same rater on the same interview at an interval of at least two weeks. Intra-rater reliability correlation is presented in Table 26.

Other Findings

The data from Rogers' (2004) study of the grandparent social role found that as physical distance between subjects increased, the mean performance rating also decreased. Data were collected in this study to determine the distance between the adult

Table 24

Final Group Sample for Daughter/Son Social Role Inter-Rater Reliability by

Performance Score

Assessor	Rater1	Rater 2	Rater 3 ^a	Rater 4
	<i>r</i>	<i>k*/r</i>	<i>k*/r</i>	<i>k*</i>
Rater 1	1.00	0.85	0.07	0.86
Rater 2	0.94	1.00	0.08	0.77
Rater 3 ^a	0.81	0.81	1.00	0.21
Rater 4	0.94	0.93	0.78	1.00

Note. N=12 Scores range from 0 to 9.

* *Reliability estimates are below diagonal. Kappa estimates are above.*

^a Because the scores for Rater 3 were unbalanced in configuration and were not calculated by SAS, simple Kappas were calculated for all pair-wise comparisons for this rater.

child and the parent with whom she/he was most involved. An analysis of variance indicated that there was a significant difference in Daughter/Son role performance between those in close proximity and those at further distances ($p < .05$). Of this study's respondents, 53.33% lived more than 50 miles from the parent with whom they were most involved, with 36.67% living more than 500 miles away. See Table 27 for frequencies on distance. Furthermore, mean role performance was directly inversely

Table 25

Final Group Sample for Daughter/Son Social Role Inter-Rater Reliability by Performance Level

Assessor	Rater1	Rater 2	Rater 3 ^a	Rater 4
	<i>r</i>	<i>k*/r</i>	<i>k*/r</i>	<i>k*</i>
Rater 1	1.00	0.92	0.09	0.75
Rater 2	0.96	1.00	0.05	0.82
Rater 3 ^a	0.61	0.53	1.00	0.18
Rater 4	0.91	0.93	0.58	1.00

Note. N=12 Scores range from 1-5.

* Reliability estimates are below diagonal. Kappa estimates are above.

^a Because the scores for Rater 3 were unbalanced in configuration and were not calculated by SAS, simple Kappas were calculated for all pair-wise comparisons for this rater.

associated with distance. Table 28 displays the mean role performance scores; mean scores drop with each level increase in distance.

The interaction between distance and number of biological or adoptive parents was also significant ($p < .0001$). Table 28 presents the analysis of the three independent variables of distance, number of biological or adoptive parents, and involvement in decision-making as they are related to final role performance.

Table 26

Final Group Sample Intra-Rater Relationship for Performance Score and Level for the Daughter/Son Social Role

Assessor	Performance Score (0-9) <i>r</i>	Performance Level (1-5) <i>r</i>
Rater 1	0.99	0.97
Rater 2	0.95	0.96
Rater3	0.86	0.82
Rater 4	0.89	0.81

Note. $N=12$, $p<.0024$ Scores of interviews over period of time by each rater. Each rater scored 12 interviews separated by time.

Data were also gathered on the degree of relationship (parent, step-parent, or parent-in-law) of the person with who the respondent Daughter/Son was most involved. Of the 150 study respondents, 85.4% indicated that they were most involved with one of their legal parents (biological or adoptive); 64.7% indicated that it was their mother with whom they were most involved, and 20.7% indicated it was with a father with whom they were most involved. Of the 150 respondents, only six indicated the most involvement with a step-parent, and 16 with an in-law. These data do not necessarily represent the extent the person prefers that parent over other parents; in some cases in this study, especially for the older respondents, there was only one living parent with whom to be involved at any level.

Table 27

Frequency Distribution of Distance between Daughter/Son and the Parent with Whom She/he is Most Involved

Distance	<i>n</i>	%
0 miles-Live together	13	8.67
0-15 miles	35	23.33
16-50 miles	22	14.67
51-499 miles	25	16.77
500+ miles	55	36.67

N=150

Involvement with parents' decision-making was also significant as a main effect. See Table 29 for the summary table of the main effects and interactions between distance, number of biological or adoptive parents, and involvement in parents' decision-making.. Examination of means on a forced-choice question about the Daughter/Son's involvement in the parents' decision-making indicates that the means are higher for those most involved and that main effects were significant. See Table 30 for the numbers and mean scores of participants' reports by level of involvement in parents' decision-making.

Observations

While the goal of this study was to content validate a Performance Rating Scale and Interview Protocol for the Daughter/Son adult social role, the process of developing

Table 28

Mean Scores and Standard Deviations for Daughter/Son Social Role Performance Scores by Distance

Distance	<i>n</i>	Mean	<i>SD</i>
0 Miles-Live Together	13	7.35	1.60
0-15 Miles	35	6.91	1.18
16-50 Miles	22	5.95	2.01
51-499 Miles	25	5.70	1.63
500+	55	5.17	1.91

Note. *N*=150 Score range is 0 to 9.

the instruments, training interviewers and scorers, and administering the Interview Protocol to almost 200 persons in the process of trials of drafts, field testing, and the conducting the exploratory investigation provided the opportunity to observe more about the Daughter/Son social role than was the principal objective of the study. The open-ended questions allowed respondents to elaborate on their thoughts beyond the most direct answer. In fact, throughout the process, people reflected their own experience and beliefs as they participated in various ways. Of all the adult social roles, Daughter/Son is the universal role, for at some point in every life, one has been a daughter or son. Due to higher standard of living, increased length of life span, and better health care, most

Table 29

Summary Table for Final Daughter/Son Social Role Scores and Distance, Extent of Daughter/Son's Involvement in Parents' Decision-Making, and the Number of Living Biological (or Adoptive) Parents

Source	<i>df</i>	Type III Sum of Squares	Mean Square	<i>F</i>	<i>p</i>
Distance	4	20.25	5.06	3.13	0.0180
Involvement in Decision-Making	4	88.85	22.21	13.74	<0.0001
# Biological Parents	2	4.77	2.39	1.48	0.2336
Distance x # Bio Parents	7	17.37	2.48	13.53	0.1643
Distance x Involvement in Decisions	15	28.68	1.91	1.18	0.2979
Involvement x # Bio Parents	8	13.23	1.65	1.02	0.4241
Distance x Involvement x # Bio Parents	9	5.00	0.56	0.34	0.9581
Error	100	161.69	1.62		
Corrected Total	149	517.12			

N=150 *p*<.05

Table 30

Mean Scores and Standard Deviations for Daughter/Son Performance Scores by Reported Level of Involvement in Parents' Decision-Making

Level of Response	<i>n</i>	<i>M</i>	<i>SD</i>
Not at all	12	3.08	2.09
To a very limited extent	34	4.82	1.66
To a moderate extent	40	5.96	1.50
To a great extent	43	6.85	0.93
To a very great extent-I make decisions	21	7.69	0.86

Note. *N*=150 Score range is 0-9.

Americans live to play the Daughter/Son role as an adult for a longer portion of their lives. Furthermore, it is an affective role with a great emotional content for many, as was found in this study. Many respondents expressed pleasure at the opportunity to talk about that aspect of their lives, some were visibly emotional about the subject, and some expressed deep hurt and anger that had carried into their adult years.

Looking through the mirror of the strands, with regard to Involvement, the great majority of respondents felt they were included in their parents' decision-making, at least to the extent that they were asked for feedback or included for input into major life decisions. Few, however, claimed to be the primary decision-maker for parents; even in

the cases where the parent was incapable of making her/his decisions, it was clear that decision-making included other family members; in these situations, decision-making was a family enterprise.

Having contact with at least one of the respondent's parents by phone and email was typically at least once a week, a benefit no doubt of the ease and availability of internet use and cheap telephone communication with cell phones and unlimited or high volume minute payment plans. With many of the study respondents living more than 50 miles from the parent with whom they were most involved, it was common to see reports of extended visits of a week or more. The reports of numbers of visits and length of stays suggest that many employed respondents may have been using much, if not most, of their vacation time to visit parents.

In the section of the Interview Protocol on the Perception section, the most frequent response to the forced-choice question asking respondents to indicate where their role as a Daughter/Son fell among their life's priorities was that it was in the top three things that they do with their lives; the next most frequent was that it was about in the middle of all the things they do. In the open-ended follow-up question, over and over respondents volunteered that their own family came first. Some mentioned that their own lives took priority, including work, friends, and activities. Though care and concern were expressed, it was clear that the establishing of independence from the family of origin had shifted the primary responsibility and obligation to their new family and the next generation, and the respondents said that repeatedly. The centrality of parents in their

daily lives was diminished as the business of meeting responsibilities of their own lives preoccupied them.

The Perception section also asked questions about benefits and satisfactions associated with the role and of both receiving and giving assistance. Emotional support was a frequent aspect of mutual assistance; advice was often exchanged. Occasionally financial assistance was mentioned, with the flow of funds going both ways, but this was not a frequently mentioned benefit either given or received. The benefits and satisfactions were most often emotional; instrumental exchanges were for chores such as home maintenance, moving, or childcare. “Being there” for each other was a phrase used to describe the role that both generations played for each other as back-up resources when emergencies occur. Another benefit that the respondents mentioned periodically was the role that their parents had in keeping them connected to other family members. Family news and family history were seen as benefits of the adult child relationship with her or his parents, respondents frequently used the phrase “paying back” as a source of satisfaction in the Daughter/Son role. Even when said in a context of obvious affection, the social norm of obligation to acknowledge the sacrifices parents had made was expressed. Being able to care for them in some tangible manner, even as one respondent said, “to pick up the bill at dinner,” was a source of satisfaction in being able to return in a small way a debt owed to parents. It was also noteworthy that in several cases where there was an obvious history of conflict and bad feeling, the respondent expressed satisfaction in being able to see that the parent was safe and comfortable; the obligation to protect was still present.

In Activities, respondents were asked about behaviors related to being a Daughter/Son. Given an opportunity to suggest activities they most enjoyed with their parent(s), eating together, shopping together, and specific sports were mentioned. Most often, however, just talking and being together was what was offered as what the respondent like most that she/he did with the parent. Even in situations where the parent's health prevented much overt participation in activity or relationship, being together was seen as satisfying to the respondent.

In one section of the Activity portion of the Interview Protocol, respondents were asked to indicate the parent with whom she/he had the most involvement and to indicate the types of activities and the amount of time spent in those activities associated with the Daughter/Son role. It was here that the health of the parent became a subject for comment. In cases where the parents were older and had health issues, involvement with providing care, overseeing care, and assisting with medical management became evident in the role. Nevertheless, those respondents who lived at a distance were usually less involved than those closer; in this life stage, this study implies that children and parents who do not live close were not as able to enact role behaviors that may be required for aging parents. For some, to serve in that capacity had required moving the parent closer to them, moving themselves closer to the parent, or suspending their own work in order to move temporarily to care for a parent.

Role Improvement was a strand that was used to enhance a performance rating but not detract from it. In asking respondents to comment on the types of activities in which they might have engaged to improve role behavior, many reported only low-commitment

activities such as watching a television program or reading a book or magazine article. A few indicated that they had sought professional help at some point to improve their relationship with their parents, but most said they had talked to family or friends if they wanted advice about relationship improvement. When asked what they would do if they needed to know something to improve their role as a Daughter/Son, the most common responses were to talk to someone (occasionally a doctor) or to go to the library or Internet for information. For the most part, however, the idea of intentionally “doing something” to improve role performance did not seem to be compelling. An exception was that getting information about a parent’s medical condition was recognized as a necessary activity to do a better job of helping a parent.

A last section of the Interview Protocol asked questions specifically to the young respondents (ages 18 to 34 years) about their changing relationship with their parent(s). Questions centered around the respondent’s taking on new roles, particularly those of spouse and parent and the impact the new roles had on their Daughter/Son social role. In this sample, many of the respondents were still single or were not yet parents, but comments from those who could respond provide interesting observations. One elite young male spoke throughout the interview of the importance of his role as a bridge between his young child and his parents. He saw his role as the gatekeeper for that relationship, both enabling it but also defining its boundaries. Others described the importance of making sure that the two generations knew each other as family. Describing the changes that having in-laws had created, the addition of more people to

please or to spend time with was a factor. Even when it was described as a good relationship, the addition of more demands was implied by some respondents.

Young people saw their independence as an opportunity to show their parents that they had performed well as parents. In the Perception section, respondents were asked about what they thought their parents expected of them, and many indicated that good behavior of various descriptions was an expectation. A young female respondent elaborated both in response to that question and in the questions for the young respondents at the end of the Interview Protocol that she felt her successes were affirmations to her parents that they had been successes. They could enjoy her experiences and accomplishments because they were confirmations that they had accomplished their responsibilities as good parents.

Summary

This chapter presented the results of the processes and data analysis for the development and content validation of the Performance Rating Scale and Interview Protocol for the Daughter/Son adult social role and the use of the instruments in an exploratory investigation. Examination of main effects for the three independent variables of age, gender, and socioeconomic status found significance for the gender independent variable, but age and socioeconomic status were not significant. Additionally, there were no significant interaction effects. Analysis of other secondary variables found that distance between adult children and their parents had a significant impact on role performance scores. It was also found that being involved with parents' decision-making was significantly associated with higher final role performance.

CHAPTER 5
SUMMARY, CONCLUSIONS,
IMPLICATIONS, AND RECOMMENDATIONS

The purpose of this study was to construct and content validate a Performance Rating Scale and Interview Protocol for the contemporary Daughter/Son adult social role; an exploratory investigation was conducted to demonstrate the utility of the instruments in providing consistent, unbiased results to study this adult role. This chapter presents (a) a summary of the study, (b) conclusions of the study, (c) the implications of the findings of the study, and (d) recommendations for further research suggested by this study.

The research questions addressed in this study were:

1. Are there age-related differences in adults' performance of the Daughter/Son social role?
2. Are there gender-related differences in adults' performance of the Daughter/Son social role?
3. Are there socio-economic status differences in adults' performance of the Daughter/Son social role?
4. Are there interaction effects between the age, gender, and socio-economic status variables related to adults' performance of the Daughter/Son social role?

5. Are there activities related to performance of the Daughter/Son social role suggested by the respondents that are not related to the aging and increasing dependency of parents?
6. Are there other significant variables that influence Daughter/Son role performance?

Two research hypotheses were also tested in this study.

1. There are gender-related differences in adults' performance of the Daughter/Son social role, with daughters performing at higher levels.
2. There are socio-economic status differences in adults' performance of the Daughter/Son social role.

Summary

This study was a part of larger University of South Florida Social Roles Research Project (Barthmus, 2004/2005; Davis, 2002; Dye, 1997; Hargiss, 1997/1998; Kirkman, 1994/1995; McCloskey, 1999; Montgomery, 1997/1998; Rogers, 2004/2005; Wall, 1997/1998; Witte, 1997/1998; Yates-Carter, 1997/1998) to update Havighurst's mid-20th century studies of adult social roles. This study addressed the development and content validation of the Daughter/Son adult social role. The stated research objectives of this study were:

1. To content validate a Performance Rating Scale for the Daughter/Son adult social role in order to enable researchers to assess the role performance of individual adults across the life span.

2. To content validate an Interview Protocol for the adult social role of Daughter/Son in order that reliable distinctions can be made about the role performance of individuals.
3. To implement the use of the Performance Rating Scale and the Interview Protocol in an exploratory study using a quota sample of subjects primarily from the Tampa Bay, Florida, area.
4. To generate data from the exploratory study about the Daughter/Son role performance that will suggest further research possibilities and, in particular, will suggest research related to developmental tasks across the life span that are unrelated to care for an aging parent.

To develop the Performance Rating Scale and the Interview Protocol, a series of expert panels was assembled to develop behavioral indicators, describe levels of role performance, construct interview questions, and develop language that was both clear and complete in both instruments. Critique of the instrument drafts provided suggestions and feedback at each stage of development. Revisions and refinements were made to the instruments throughout the process. Another group of experts was assembled and trained in the use of the Performance Rating Scale to rate the role performance of the field test interviews and to give feedback. At the end of the field test, the exploratory investigation began.

Participants were from the Tampa Bay area and met specific demographic characteristics. The Interview Protocol was administered to a quota sample of 150 persons largely respondents were assigned to 30 cells generated by a 2 (gender) x 5 (SES

levels) x 3 (age categories) research design; racial/ethnic minorities were systematically represented in the study. The Interview Protocols were rated for role performance level using the Performance Rating Scale. Data were collected from the ratings and were analyzed using ANOVA and calculations for descriptive statistics. Data were also analyzed for secondary variables to ascertain if distance, the number of parents, and the reported involvement in the parents' important life decisions were associated with role performance. Inter-rater reliability was calculated for the field test, and inter- and intra rater reliability were calculated for a study sample of the interviews having the greatest difference in performance ratings. Cohen's Kappa and Pearson's product moment tests were applied.

Conclusions

This study was successful in developing and content validating a Performance Rating Scale and Interview Protocol for the Daughter/Son adult social role. The process used to create these instruments was similar to that used in the other social roles studies, and the tests for reliability of the instruments affirmed that they provide stable and consistent performance ratings. Their implementation in the exploratory investigation determined that they were useful tools to collect data on role performance for the Daughter/Son social role.

In the exploratory study, six research questions and two hypotheses were posed.

Conclusions drawn from the research results are as follows:

1. There were no significant differences based on age.

2. There were significant differences based on gender. As hypothesized based upon review of the literature, females performed higher than males.
3. There were no significant differences based on SES level, as was expected.
4. There were no interactions between any of the independent variables of age, gender, and SES level.
5. There appeared to be no specific activities unrelated to aging and the increasing dependency of parents based on the information collected in this study.
6. Close proximity to the parent(s) was directly related to higher social role performance score.
7. Involvement in parents' decision-making was significantly associated with higher role performance.

The mean final role performance for Daughter/Son social role was 5.97. This was the fourth highest mean performance rating score of all the social roles. Only Parent ($M=6.73$), Spouse/Partner ($M=6.43$), and Worker ($M=6.47$) were higher. All of these fell within the above average performance level. The Daughter/Son role Mean at 5.97 was the highest final score in the Average Performance Level.

Implications

Implications both for the practice of adult education and for the refinement of this specific social role instrument are discussed below.

Implications for Adult Education Practice

1. Daughters/Sons do not frequently seek out opportunities to learn more about improving performance of this social role. The responses in the interviews did,

however, suggest that they do seek out medical information in order to know how to provide better help to a parent. This would suggest that topics about parents and health care or specific topics related to health are desired by adult children as they perform their Daughter/Son role. Community education by hospitals and other health care organizations might consider adult children helping their parents as potential consumers of their educational programs.

2. The respondents in this study frequently stated that for most of them, their own spouse and children were their top responsibilities in terms of their life priorities. They also spoke of time as a barrier to the Daughter/Son role performance because of the juggling of roles. One implication is that multi-generational educational events could enable Daughters/Sons to participate with their children and include parents. Environmental weekend programs, sports camps, computer/technology education programs for example, could serve the entire family with pleasurable and educational programming that could be shared together. Elderhostel programs already include programs for grandparents and grandchildren; three-generational programs might also be offered.
3. A general implication for adult education practice arising from the interviews is that Daughters/Sons have many competing demands for their time. Even in positive and warm relationships between adult children and their parents, the adult children found making time for parents to be a barrier to role performance. Many did it anyway because it was such an important relationship to them, and they felt responsibility and obligation to their parents. Spontaneous comments throughout

the interviews revealed a strong sense that there was not enough time to meet all their obligations, sometimes even their very high priorities. Adults need to see adult education programs and events as worth the time spent in them. In terms of Daughter/Son role performance, programs that address problems related to specific events or situations are most likely to be perceived as valuable by Daughters/Sons.

4. This information from this study is also a reminder that parents matter to their adult children, and those relationships are part of a larger web of demands. That a high percentage of the study's population lived more than 500 miles from the parent with whom she/he was most involved confirmed the changes in family living arrangements that have occurred since Havighurst studied social roles. In building environments in which adult students can learn and work productively, educators should be aware that the support system may be geographically distant. Role performance may require travel and time. Successful student-centered education will understand this reality.

Instrument Refinement

Additional modifications, changes, or suggestions to improve the instruments are discussed below.

1. One time-saving change would be to amend the Family Demographic page (Question #1) of the Interview Protocol. It was valuable to know how many parents the respondent had in her/his life and the degree of relationship, but it was

not necessary to have the other specific information on the form for anyone except the person with whom the respondent was most involved.

2. The Performance Rating Scale worked well as a guide for rating. Raters were able to discern differences in role performance based upon the behavior descriptors and were able to come to consensus. However, the area of the rating scale that was the most difficult to distinguish among levels was high Above Average and low High performance (between scores of 7 and 8). Addressing those two levels of descriptors specifically to see if the addition of more descriptors might help distinguish the scores for raters and improve the ease of rating.
3. Additional detail about how a respondent has addressed role improvement might be added to the Interview Protocol in order to learn more about the behaviors in which the participant has engaged. More open-ended questions could elicit a more unstructured response.

Recommendations for Further Research

Recommendations for additional research are offered below.

1. A next step toward the goal of more research on the social context of the Daughter/Son social role is to conduct research on how individuals navigate multiple roles, prioritizing them, changing them across the life span, and choosing which to embrace and which to pass by. A study of the integration of the social roles into a whole life fabric and the social context that cuts and textures that fabric would build on this study and the others in the University of South Florida

Social Roles Research Project. Studying multiple social roles in one individual is one potential method for collecting data.

Merriam, Caffarella, and Baumgartner (2007) prefaced the 3rd edition of *Learning in adulthood: A comprehensive guide* with these words:

In most writing on adult learning, the sociocultural perspective has been widely neglected in favor of the predominant orientation to the individual learner and how to facilitate her or his learning. In addition to the focus on the learner, we attend to the context in which learning takes place and to learners' interactive relationship with that context and with the learning activity itself. We look at how the social structure influences what is offered and who participates, how the sociocultural context creates particular needs and interests, and how social factors such as race, class, and gender shape learning. (p. x.)

This study of the Daughter/Son adult social role addressed an important aspect of the social context of contemporary adult learners, but it also indicates areas of future study. This study was a part of a larger group of studies to update Havighurst's foundational work on developmental tasks and adult social roles (Havighurst, 1955; Havighurst, 1957; Havighurst & Orr, 1956) in light of contemporary American life. Reflecting on the Merriam, Caffarella, and Baumgartner quotation above, how the confluence of many individuals living out their respective social roles as daughters and sons shapes the sociocultural context of contemporary life is also a productive area for study.

2. Role configuration is a key concept in study of the life course. Defined by Macmillan and Copher (2005) as "age-specific matrices of multiple social roles that give unique meaning to each component role" (p. 859), study of the

Daughter/Son social role as a part of the role configuration of a specified age group (for example young adults) is also a logical extension of this study.

3. One limitation of this study was that the geographic area of research was largely confined to one major metropolitan area. A larger study sample drawing from a national pool of respondents could yield even more information about the patterns and influences impacting Daughter/Son social role performance. It could address questions about the representativeness of the study sample and confirm or revise findings in light of a national perspective.
4. A study of the differences in role performance among minority groups should be considered. This study did not address how Daughter/Son role performance differed among minority groups, but the differences found in Rogers' (2004) study of the Grandparent role and Yates-Carter's (1997/1998) study of the Relative/Kin role suggest that there might be important differences in how various minority group members perceive and carry out their Daughter/Son social roles.
5. Gathering additional information on other variables impacting Daughter/Son role performance would be valuable. This study found that distance from parents is related to role performance, but it did not address the characteristics of high levels of role performance over a distance. Other variables of potential interest suggested by this study are the health of adult child and parent(s), the influence of the Daughter/Son's working on role performance, and the presence of other family members who share responsibility for parental care and decision-making when needed.

6. This study used three cohorts (young, middle, and older) in the research design to study the Daughter/Son social role. It captured the self-reported role performance behaviors at the moment in time in which the interview was conducted, and this design revealed the current condition of role performance within the three age groups. This was not, however, necessarily a true picture of how role performance changes over time because it cannot be inferred that one group's role performance will become like the older group's behavior over time; in variables so influenced by a dynamic environment, the young in this study may or may not perform like today's middle age respondents when they reach ages 35 to 64 years. Future longitudinal research of Daughter/Son role performance could illuminate the dynamics of change in role performance and developmental tasks over the life span.
7. The numbers of parents with whom a Daughter/Son have a relationship are larger than in Havighurst's time, with changes in the patterns of marriage, re-marriage, and family blending in contemporary life. Staying alone versus remarrying may have very different consequences for the Daughter/Son role performance of the adult child, but more study of the dynamics of role performance relative to the parental marital situation is needed.
8. Young persons have major involvement in the Daughter/Son during those years, but how that involvement is manifested in developmental tasks needs further exploration. Also, more study of the impact on the Daughter/Son role of having in-laws (more parents instantly) and the extension of that sense of having them as

parents is needed in order to understand that transition. In this study, the young respondents with in-laws often did not mention them when naming their parents. Middle-aged and older respondents were more spontaneous in mentioning their in-laws as parents. How and when that sense of one's spouse's parents are viewed as one's own parents needs further research. More data about that process of accepting the role of Daughter/Son in relation to parents-in-law is needed to understand Daughter/Son role performance more thoroughly. Additionally, the task of establishing ground rules for the relationship between their parents and the adult child's own children needs further research with regard to the young age level and its developmental tasks. Literature about the young adult concentrates on the developmental tasks associated with breaking away from the family of origin and establishing an independent life. Havighurst (1952) wrote extensively about the developmental tasks of young adults, but he did not include any comment about the Daughter/Son role for this age group.

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Appendix A

Nam-Powers-Boyd Occupational Status Scores for 2000

Appendix A (Continued)

Nam-Powers-Boyd Occupational Status Scores for 2000

Organized by SES Level

LEVEL 1
0-12 Points

<u>Occup. Code</u>	Job Title	<u>Occup. Score</u>
402	Cooks	8
406	Counter attendants, cafeteria, food concession, and coffee shop	1
394	Crossing guards	11
413	Dining room and cafeteria attendants and bartender helpers	1
414	Dishwashers	1
785	Food cooking machine operators and tenders	11
416	Food preparation and serving related workers, all others	5
403	Food preparation workers	3
604	Graders and sorters, agricultural products	4
425	Grounds maintenance workers	11
660	Helpers, construction trades	12
761	Helpers—installation, maintenance, and repair workers	11
415	Hosts and hostesses, restaurant, lounge, and coffee shop	4
395	Lifeguards and other protective service workers	11
423	Maids and housekeeping cleaners	7
605	Miscellaneous agricultural workers	6
964	Packers and packagers, hand	12
831	Pressers, textile, garment, and related materials	9
936	Service station attendants	11
832	Sewing machine operators	11
442	Ushers, lobby attendants, and ticket takers	11

Migrant workers; unskilled; chronically unemployed; persons incapable of being employed (e.g., the long-term mentally ill)

LEVEL 2
13-65 Points

Appendix A (Continued)

270	Actors	55
190	Agricultural and food science technicians	59
601	Agricultural inspectors	64
771	Aircraft structure, surfaces, rigging, and systems assemblers	45
911	Ambulance drivers and attendants, except emergency medical technicians	39
602	Animal breeders	28
390	Animal control workers	44
434	Animal trainers	37
280	Announcers	55
260	Artists and related workers	56
272	Athletes, coaches, umpires, and related workers	41
715	Automotive body and related repairers	33
716	Automotive glass installers and repairers	43
720	Automotive service technicians and mechanics	37
453	Baggage porters, bellhops, and concierges	36
380	Bailiffs, correctional officers, and jailers	60
780	Bakers	22
450	Barbers	31
404	Bartenders	30
510	Bill and account collectors	49
511	Billing and posting clerks and machine operators	47
621	Boilermakers	51
823	Bookbinders and bindery workers	30
512	Bookkeeping, accounting, and auditing clerks	48
622	Brickmasons, blockmasons, and stonemasons	29
934	Bridge and lock tenders	58
721	Bus and truck mechanics and diesel engine specialists	48
912	Bus drivers	31
781	Butchers and other meat, poultry, and fish processing workers	22
850	Cabinetmakers and bench carpenters	37
550	Cargo and freight agents	55
623	Carpenters	35
624	Carpet, floor, and tile installers and finishers	29
625	Cement masons, concrete finishers, and terrazzo workers	24
885	Cementing and gluing machine operators and tenders	23
400	Chefs and head cooks	39
864	Chemical processing machine setters, operators, and tenders	57
460	Child care workers	21
886	Cleaning, washing, and metal pickling equipment operators and tenders	20
751	Coin, vending, and amusement machine servicers and repairers	39
752	Commercial divers	62
503	Communications equipment operators, all other	55
790	Computer control programmers and operators	54
580	Computer operators	58
632	Construction equipment workers, except paving, surfacing, and tamping equipment operators	40

Appendix A (Continued)

626	Construction laborers	21
730	Control and valve installers and repairers	55
950	Conveyer operators and tenders	30
890	Cooling and freezing equipment operators	23
521	Correspondence clerks	59
474	Counter and rental clerks	17
551	Couriers and messengers	37
522	Court, municipal, and license clerks	53
951	Crane and tower operators	51
523	Credit authorizers, checkers, and clerks	54
865	Crushing, grinding, polishing mixing, and blending workers	35
524	Customer service representatives	48
871	Cutting workers	21
795	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	33
274	Dancers and choreographers	32
581	Data entry keyers	41
364	Dental assistants	45
680	Derrick, rotary drill, and service unit operators, oil, gas, and mining	40
205	Directors, religious activities and education	63
552	Dispatchers	51
495	Door-to-door sales works, news and street vendors, and related workers	21
952	Dredge, excavating, and loading machine operators	37
796	Drilling and boring machine tool setters, operators, and tenders, metal and plastic	37
913	Driver/sales workers and truck drivers	41
633	Drywall installers, ceiling tile installers, and tapers	24
682	Earth drillers, except oil and gas	41
704	Electric motor, power tool, and related repairers	63
705	Electrical and electronics installers and repairers, transportation equipment	64
741	Electrical power-line installers and repairers	64
772	Electrical, electronics, and electromechanical assemblers	28
635	Electricians	58
711	Electronic equipment installers and repairers, motor vehicles	63
712	Electronic home entertainment equipment installers and repairers	48
340	Emergency medical technicians and paramedics	65
773	Engine and other machine assemblers	50
276	Entertainers and performers, sports and related workers, all other	37
891	Etchers and engravers	35
683	Explosives workers, ordnance handling experts, and blasters	53
792	Extruding and drawing machine setters, operators, and tenders, metal and plastic	46
843	Extruding and forming machine setters, operators, and tenders, synthetic and glass fibers	44
872	Extruding, forming, pressing, and compacting machine setters, operators, and tenders	35

Appendix A (Continued)

020	Farm, ranch, and other agricultural managers	49
021	Farmers and ranchers	31
671	Fence erectors	20
526	File clerks	29
620	First-line supervisors/managers of construction trades and extraction workers	60
600	First-line supervisors/managers of farming, fishing, and forestry workers	33
401	First-line supervisors/managers of food preparation and serving workers	33
430	First-line supervisors/managers of gaming workers	62
420	First-line supervisors/managers of housekeeping and janitorial workers	37
421	First-line supervisors/managers of landscaping, lawn service, and groundskeeping workers	52
432	First-line supervisors/managers of personal service workers	54
770	First-line supervisors/managers of production and operating workers	60
470	First-line supervisors/managers of retail sales workers	60
610	Fishing and hunting workers	21
783	Food and tobacco roasting, baking, and drying machine operators and tenders	37
784	Food batchmakers	25
412	Food servers, nonrestaurant	16
031	Food service managers	52
612	Forest and conservation workers	18
793	Forging machine setters, operators, and tenders, metal and plastic	44
446	Funeral service workers	32
873	Furnace, kiln, oven, drier, and kettle operators and tenders	41
851	Furniture finishers	32
513	Gaming cage workers	37
033	Gaming managers	63
440	Gaming services workers	45
636	Glaziers	41
800	Grinding, lapping, polishing, and buffing machine tool setters, operators, and tenders, metal and plastic	30
451	Hairdressers, hairstylists, and cosmetologists	31
672	Hazardous materials removal workers	40
341	Health diagnosing and treating practitioner support technicians	49
815	Heat treating equipment setters, operators, and tenders, metal and plastic	48
731	Heating, air conditioning, and refrigeration mechanics and installers	51
722	Heavy vehicle and mobile equipment service technicians and mechanics	51
693	Helpers—extraction workers	20
895	Helpers—production workers	17
673	Highway maintenance workers	38
956	Hoist and winch operators	41
732	Home appliance repairers	45
530	Hotel, motel, and resort desk clerks	33
536	Human resources assistants, except payroll and timekeeping	59
611	Hunters and trappers	20

Appendix A (Continued)

733	Industrial and refractory machinery mechanics	56
960	Industrial truck and tractor operators	31
542	Information and record clerks, all other	49
874	Inspectors, testers, sorters, samplers, and weighers	45
640	Insulation workers	30
584	Insurance claims and policy processing clerks	56
531	Interviewers, except eligibility and loan	38
422	Janitors and building cleaners	17
875	Jewelers and precious stone and metal workers	34
824	Job printers	43
962	Laborers and freight, stock, and material movers, hand	20
801	Lathe and turning machine tool setters, operators, and tenders, metal and plastic	41
830	Laundry and dry-cleaning workers	13
816	Lay-out workers, metal and plastic	47
532	Library assistants, clerical	38
244	Library technicians	22
350	Licensed practical and licensed vocational nurses	57
533	Loan interviewers and clerks	59
754	Locksmiths and safe repairers	46
034	Lodging managers	63
613	Logging workers	21
963	Machine feeders and offbearers	22
803	Machinists	52
585	Mail clerks and mail machine operators, except postal service	32
734	Maintenance and repair workers, general	47
735	Maintenance workers, machinery	50
755	Manufactured building and mobile home installers	22
363	Massage therapists	48
975	Material moving workers, all other	33
365	Medical assistants and other healthcare support occupations	42
351	Medical records and health information technicians	45
876	Medical, dental and ophthalmic laboratory technicians	47
804	Metal furnace and kiln operators and tenders	43
822	Metalworkers and plastic workers, all other	34
553	Meter readers, utilities	46
802	Milling and planing machine setters, operators, and tenders, metal and plastic	43
736	Millwrights	63
684	Mining machine operators	52
775	Miscellaneous assemblers and fabricators	29
676	Miscellaneous construction and related workers	33
443	Miscellaneous entertainment attendants and related workers	15
353	Miscellaneous health technologists and technicians	60
215	Miscellaneous legal support workers	64
286	Miscellaneous media and communication workers	57

Appendix A (Continued)

452	Miscellaneous personal appearance workers	24
863	Miscellaneous plant and system operators	65
846	Miscellaneous textile, apparel, and furnishings workers, except upholsterers	18
726	Miscellaneous vehicle and mobile equipment mechanics, installers and repairers	20
852	Model makers and patternmakers, wood	53
490	Models, demonstrators, and product promoters	21
810	Molders and molding machine setters, operators, and tenders, metal and plastic	38
892	Molders, shapers, and casters, except metal and plastic	38
441	Motion picture projectionists	27
915	Motor vehicle operators, all other	18
812	Multiple machine tool setters, operators, and tenders, metal and plastic	42
275	Musicians, singers, and related workers	51
534	New accounts clerks	58
435	Nonfarm animal caretakers	25
360	Nursing, psychiatric, and home health aides	28
361	Occupational therapist assistants and aides	62
593	Office and administrative support workers, all other	60
586	Office clerks, general	40
590	Office machine operators, except computer	36
352	Opticians, dispensing	57
535	Order clerks	36
694	Other extraction workers	35
762	Other installation, maintenance, and repair workers	43
196	Other life, physical, and social science technicians	53
234	Other teachers and instructors	45
942	Other transportation workers	53
880	Packaging and filling machine operators and tenders	18
642	Painters, construction and maintenance	23
881	Painting workers	30
893	Paper goods machine setters, operators, and tenders	40
643	Paperhangers	41
384	Parking enforcement workers	44
935	Parking lot attendants	20
475	Parts salespersons	42
630	Paving, surfacing, and tamping equipment operators	30
514	Payroll and timekeeping clerks	55
461	Personal and home care aides	19
465	Personal care and service workers, all other	24
424	Pest control workers	44
291	Photographers	55
883	Photographic process workers and processing machine operators	33
362	Physical therapist assistants and aides	56
631	Pile driver operators	63

Appendix A (Continued)

644	Pipelayers, plumbers, pipefitters, and steamfitters	47
646	Plasterers and stucco masons	27
820	Plating and coating machine setters, operators, and tenders, metal and plastic	38
825	Prepress technicians and workers	46
230	Preschool and kindergarten teachers	45
826	Printing machine operators	45
515	Procurement clerks	63
896	Production workers, all other	30
591	Proofreaders and copy markers	51
965	Pumping station operators	50
051	Purchasing agents and buyers, farm products	57
923	Railroad brake, signal, and switch operators	61
674	Rail-track laying and maintenance equipment operators	49
540	Receptionist and information clerks	34
462	Recreation and fitness workers	37
972	Refuse and recyclable material collectors	22
650	Reinforcing iron and rebar workers	32
206	Religious workers, all other	50
541	Reservation and transportation ticket agents and travel clerks	53
464	Residential advisors	36
476	Retail salespersons	32
756	Riggers	46
794	Rolling machine setters, operators, and tenders, metal and plastic	36
691	Roof bolters, mining	47
651	Roofers	18
692	Roustabouts, oil and gas	14
930	Sailors and marine oilers	40
496	Sales and related workers, all other	61
853	Sawing machine setters, operators, and tenders, wood	21
570	Secretaries and administrative assistants	54
713	Security and fire alarm systems installers	52
392	Security guards and gaming surveillance offices	36
884	Semiconductor processors	55
675	Septic tank servicers and sewer pipe cleaners	33
652	Sheet metal workers	50
933	Ship engineers	65
561	Shipping, receiving, and traffic clerks	33
833	Shoe and leather workers and repairers	19
834	Shoe machine operators and tenders	20
973	Shuttle car operators	14
724	Small engine mechanics	32
861	Stationary engineers and boiler operators	63
592	Statistical assistants	60
562	Stock clerks and order fillers	24
653	Structural iron and steel workers	47

Appendix A (Continued)

774	Structural metal fabricators and fitters	50
926	Subway, streetcar, and other rail transportation workers	59
900	Supervisors, transportation and material moving workers	60
156	Surveying and mapping technicians	56
501	Switchboard operators, including answering service	34
835	Tailors, dressmakers, and sewers	20
974	Tank car, truck, and ship loaders	28
094	Tax preparers	44
914	Taxi drivers and chauffeurs	31
254	Teacher assistants	32
742	Telecommunications line installers and repairers	57
494	Telemarketers	20
502	Telephone operators	39
516	Tellers	36
836	Textile bleaching and dyeing machine operators and tenders	26
840	Textile cutting machine setters, operators, and tenders	16
841	Textile knitting and weaving machine setters, operators, and tenders	24
842	Textile winding, twisting, and drawing out machine setters, operators, and tenders	19
894	Tire builders	56
813	Tool and die makers	64
821	Tool grinders, filers, and sharpeners	45
454	Tour and travel guides	32
386	Transit and railroad police	48
483	Transportation attendants	62
483	Travel agents	56
845	Upholsterers	23
411	Waiters and waitresses	20
862	Water and liquid waste treatment plant and system operators	61
563	Weighers, measurers, checkers, and samplers, recordkeeping	36
814	Welding, soldering, and brazing workers	39
052	Wholesale and retail buyers, except farm products	62
855	Woodworkers, all other	32
854	Woodworking machine setters, operators, and tenders, except sawing	21
582	Word processors and typists	45

Enlisted members in the U. S. military, pay grades E1 through E6

LEVEL 3
66-87 Points

080	Accountants and auditors	85
010	Administrative services managers	82
004	Advertising and promotions managers	86
480	Advertising sales agents	73

Appendix A (Continued)

050	Agents and business managers of artists, performers, and athletes	70
160	Agricultural and food scientists	83
904	Air traffic controllers and airfield operations specialists	84
714	Aircraft mechanics and service technicians	72
081	Appraisers and assessors of real estate	81
240	Archivists, curators, and museum technicians	77
703	Avionics technicians	72
191	Biological technicians	67
290	Broadcast and sound engineering technicians and radio operators	66
520	Brokerage clerks	66
192	Chemical technicians	71
054	Claims adjusters, appraisers, examiners, and investigators	73
204	Clergy	75
330	Clinical laboratory technologists and technicians	73
056	Compliance officers, except agriculture, construction, health and safety, and transportation	80
104	Computer support specialists	76
701	Computer, automated teller, and office machine repairers	66
666	Construction and building inspectors	71
022	Construction managers	77
060	Cost estimators	76
200	Counselors	75
083	Credit analysts	75
331	Dental hygienists	74
263	Designers	67
583	Desktop publishers	67
382	Detectives and criminal investigators	87
332	Diagnostic related technologists and technicians	72
303	Dietitians and nutritionists	70
154	Drafters	69
283	Editors	79
710	Electrical and electronics repairers, industrial and utility	68
231	Elementary and middle school teachers	83
670	Elevator installers and repairers	66
525	Eligibility interviewers, government programs	68
155	Engineering technicians, except drafters	72
844	Fabric and apparel patternmakers	76
012	Financial managers	86
095	Financial specialists, all other	73
374	Fire fighters	77
375	Fire inspectors	77
370	First-line supervisors/managers of correctional officers	72
372	First-line supervisors/managers of fire fighting and prevention workers	83
700	First-line supervisors/managers of mechanics, installers, and repairers	68
471	First-line supervisors/managers of non-retail sales workers	76
500	First-line supervisors/managers of office and administrative support	66

Appendix A (Continued)

	workers	
371	First-line supervisors/managers of police and detectives	85
383	Fish and game wardens	83
032	Funeral directors	75
002	General and operations managers	86
193	Geological and petroleum technicians	75
326	Health diagnosing and treating practitioners, all other	71
013	Human resources managers	82
062	Human resources, training, and labor relations specialists	77
014	Industrial production managers	84
481	Insurance sales agents	74
086	Insurance underwriters	82
003	Legislators	76
243	Librarians	82
091	Loan counselors and officers	76
920	Locomotive engineers and operators	70
070	Logisticians	83
043	Managers, all other	86
181	Market and survey researchers	87
296	Media and communication equipment workers, all other	66
035	Medical and health services managers	85
072	Meeting and convention planners	72
202	Miscellaneous community and social service specialists	68
186	Miscellaneous social scientists and related workers	82
806	Model makers and patternmakers, metal and plastic	68
110	Network and computer systems administrators	83
111	Network systems and data communications analysts	84
281	New analysts, reporters and correspondents	78
194	Nuclear technicians	79
073	Other business operations specialists	69
354	Other healthcare practitioners and technical occupations	79
214	Paralegals and legal assistants	71
311	Physician assistants	78
385	Police and sheriff's patrol officers	79
554	Postal service clerks	69
555	Postal service mail carriers	69
556	Postal service mail sorters, processors, and processing machine operators	67
040	Postmasters and mail superintendents	76
220	Postsecondary teachers	86
860	Power plant operators, distributors, and dispatcher	73
743	Precision instrument and equipment repairers	67
391	Private detectives and investigators	72
271	Producers and directors	86
560	Production, planning, and expediting clerks	66
041	Property, real estate, and community association managers	67
282	Public relations specialists	79

Appendix A (Continued)

053	Purchasing agents, except wholesale, retail, and farm products	74
015	Purchasing managers	86
320	Radiation therapists	84
702	Radio and telecommunications equipment installers and repairers	70
924	Railroad conductors and yardmasters	68
492	Real estate brokers and sales agents	70
321	Recreational therapists	74
313	Registered nurses	83
322	Respiratory therapists	77
484	Sales representatives, services, all other	74
485	Sales representatives, wholesale and manufacturing	79
232	Secondary school teachers	86
482	Securities, commodities, and financial services sales agents	87
931	Ship and boat captains and operators	66
760	Signal and track switch repairers	69
042	Social and community service managers	78
201	Social workers	77
233	Special education teachers	80
323	Speech-language pathologists	87
373	Supervisors, protective service workers, all other	67
131	Surveyors, cartographers, and photogrammetrists	84
093	Tax examiners, collectors, and revenue agents	73
292	Television, video, and motion picture camera operators and editors	73
324	Therapists, all other	74
941	Transportation inspectors	67
016	Transportation, storage, and distribution managers	70
285	Writers and authors	76

Senior non-commissioned officers and company grade officers in U. S. military, pay grades E7 to E9 and O1 to O3.

LEVEL 4
88-97 Points

120	Actuaries	96
132	Aerospace engineers	95
133	Agricultural engineers	91
903	Aircraft pilots and flight engineers	92
130	Architects, except naval	92
171	Atmospheric and space scientists	94
314	Audiologists	91
161	Biological scientists	88
134	Biomedical engineers	91
082	Budget analysts	89
135	Chemical engineers	95

Appendix A (Continued)

172	Chemists and materials scientists	91
001	Chief executives	93
300	Chiropractors	97
136	Civil engineers	94
011	Computer and information systems managers	93
140	Computer hardware engineers	92
101	Computer programmers	90
100	Computer scientists and systems analysts	89
102	Computer software engineers	94
164	Conservation scientists and foresters	88
106	Database administrators	89
023	Education administrators	92
141	Electrical and electronics engineers	94
030	Engineering managers	96
153	Engineers, all other	94
142	Environmental engineers	95
174	Environmental scientists and geoscientists	93
084	Financial analysts	94
090	Financial examiners	91
143	Industrial engineers, including health and safety	90
071	Management analysts	92
144	Marine engineers and naval architects	92
005	Marketing and sales managers	90
145	Materials engineers	92
146	Mechanical engineers	93
165	Medical scientists	93
150	Mining and geological engineers, including mining safety engineers	91
124	Miscellaneous mathematical science occupations	91
036	Natural sciences managers	97
151	Nuclear engineers	96
315	Occupational therapists	88
122	Operations research analysts	90
255	Other education, training, and library workers	88
085	Personal financial advisors	92
152	Petroleum engineers	95
305	Pharmacists	97
176	Physical scientists, all other	91
316	Physical therapists	90
182	Psychologists	93
006	Public relations managers	89
493	Sales engineers	90
183	Sociologists	92
123	Statisticians	90
284	Technical writers	89
184	Urban and regional planners	96

Appendix A (Continued)

Field grade officers in U. S. military, pay grades O4 to O6.

LEVEL 5
98-100 Points

170	Astronomers and physicists	99
301	Dentists	100
180	Economists	98
210	Lawyers	99
211	Judges, magistrates, and other judicial workers	98
120	Mathematicians	98
304	Optometrists	99
306	Physicians and surgeons	100
312	Podiatrists	99
325	Veterinarians	98

CEO's of large (Fortune 500) corporations; Presidential appointees (e.g., Secretary of State; Senators and Governors; University Presidents and Provosts; General and Flag officers in the U. S. military, pay grades O7 to O10

Appendix B

University of South Florida Social Roles Group

Appendix B (Continued)

University of South Florida Social Roles Research Group

Names

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Appendix C
Performance Rating Scale

Appendix C (Continued)

PERFORMANCE RATING SCALE
DAUGHTER/SON ADULT SOCIAL ROLE

STRAND: INVOLVEMENT—The frequency of contact with parent(s); the amount of time spent in contact with parent(s); and the extent to which the Daughter/Son is involved with important decisions in the parent's(s') life.

Low Level—0-1

Daughter/Son never or almost never has contact with parent(s). Spends little or no time being in contact with or being involved with parent(s) and/or has little or no involvement with important decisions about her/his parent's (parents') life.

Below Average Level—2-3

Daughter/Son rarely has contact with parent(s). Spends a limited amount of time being in contact with or being involved with parent(s). Has limited involvement with important decisions about her/his parent's (parents') life.

Average Level—4-5

Daughter/Son sometimes has contact with parent(s). Spends a moderate amount of time being in contact with or being involved with parent(s). Has moderate involvement with important decisions about her/his parent's (parents') life.

Above Average Level—6-7

Daughter/Son frequently has contact with parent(s). Spends a considerable amount of time being in contact with or being involved with parent(s). Has considerable involvement with important decisions about her/his parent's (parents') life.

High Level—8-9

Daughter/Son very frequently has contact with parent(s). Spends a great amount of time being in contact with or being involved with parent(s). Has great involvement with important decisions about her/his parent (parents') life.

Appendix C (Continued)

STRAND: PERCEPTION/ATTITUDES—How the Daughter/Son feels about/perceives the importance of the Daughter/Son role and the extent to which she/he perceives personal benefit and satisfaction associated with performing the role.

Low Level—0-1

Daughter/Son attaches little or no importance to her/his role as a Daughter/Son.
Perceives little or no personal benefit to performing the Daughter/Son role.
Receives no or almost personal satisfaction from her/his role as a Daughter/Son.

Below Average Level—2-3

Daughter/Son attaches limited importance to her/his role as a Daughter/Son.
Perceives limited personal benefit to performing the Daughter/Son role. Receives limited personal satisfaction from her/his role as a Daughter/Son.

Average Level—4-5

Daughter/Son attaches moderate importance to her/his role as a Daughter/Son.
Perceives moderate personal benefit to performing the Daughter/Son role.
Receives moderate personal satisfaction from her/his role as a Daughter/Son.

Above Average Level—6-7

Daughter/Son attaches considerable importance to her/his role as a Daughter/Son.
Perceives considerable personal benefit to performing the Daughter/Son role.
Receives considerable personal satisfaction from her/his role as a Daughter/Son.

High Level—8-9

Daughter/Son attaches great importance to her/his role as a Daughter/Son.
Perceives great personal benefit to performing the Daughter/Son role. Receives great personal satisfaction from her/his role as a Daughter/Son.

Appendix C (Continued)

STRAND: ACTIVITIES—The time spent in activities involving parent(s); the amount of assistance (physical, financial, and emotional) given to and/or received from parent(s); the range of different types of activities that characterize the involvement; and the effort the Daughter/Son makes to engage in activities with parent(s).

Low Level—0-1

Daughter/Son never or almost never engages in activities involving parent(s). Gives little or no assistance to parent(s). Receives little or no assistance from parent(s). Engages in no or almost no different types of activities with parent(s).

Below Average Level—2-3

Daughter/Son rarely engages in activities involving parent(s). Gives a small amount of assistance to parent(s). Receives a small amount of assistance from parent(s). Engages in a few different types of activities with parent(s).

Average Level—4-5

Daughter/Son sometimes engages in activities involving parent(s). Gives a moderate amount of assistance to parent(s). Receives a moderate amount of assistance from parent(s). Engages in a moderate number of different types of activities with parent(s).

Above Average Level—6-7

Daughter/Son often engages in activities involving parent(s). Gives a considerable amount of assistance to parent(s). Receives considerable assistance from parent(s). Engages in many different types of activities with parent(s).

High Level—8-9

Daughter/Son very frequently engages in activities involving parent(s). Gives a great deal of assistance to parent(s). Receives a great amount of assistance from parent(s). Engages in a great many different types of activities with parent(s).

Appendix C (Continued)

STRAND: ROLE IMPROVEMENT—The Daughter/Son’s belief that she/he has a need for information to improve Daughter/Son role performance; the frequency with which she/he engages in pursuits intended to improve Daughter/Son role performance.

Low Level—0-1

Daughter/Son never or almost never undertakes pursuits intended to improve Daughter/Son role performance. Sees little or no need for information intended to improve Daughter/Son role performance.

Below Average Level—2-3

Daughter/Son rarely undertakes pursuits intended to improve Daughter/Son role performance. Sees limited need for information intended to improve Daughter/Son role performance.

Average Level—4-5

Daughter/Son sometimes undertakes pursuits intended to improve Daughter/Son role performance. Sees moderate need for information intended to improve Daughter/Son role performance.

Above Average Level—6-7

Daughter/Son frequently undertakes pursuits intended to improve Daughter/Son role performance. Sees considerable need for information intended to improve Daughter/Son role performance.

High Level—8-9

Daughter/Son very frequently undertakes pursuits intended to improve Daughter/Son role performance. Sees great need for information intended to improve Daughter/Son role performance.

Appendix D

Pilot Panel

Appendix D (Continued)

Pilot Panel Members

Rev. Martha Ebel, M. Div., M.S.W.
Minister for Senior Adults
First Presbyterian Church, Aiken, SC
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Ministry and Social Work with Older Adults

Dr. John Jacobs
President
Applied Simulation Corporation
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Educational Psychology/Measurement and Assessment

Dr. Elizabeth Purvis
Administrator, Aiken County School Board, Aiken, SC
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Educational Foundations

Dr. Melissa Riley
Department of Education
University of South Carolina, Aiken
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Educational Psychology

Dr. James Witte
Associate Professor of Education
Auburn University
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education and Research

Dr. Maria Martinez-Witte
Associate Professor of Education Auburn University
Gender: Female
Race/Ethnicity: Hispanic
Professional Area: Adult Education

Appendix E

Correspondence and Instructions to Pilot and Validation Panels for Performance Rating Scale

PLEASE READ THIS BEFORE OPENING ENVELOPES.

Four strands, or domain areas, have been identified for the Daughter/Son social role: *Involvement*, *Activities*, *Perception/Attitude*, and *Role Improvement*. In this exercise, you will perform a *Q Sort* that will be used in the development of the Performance Rating Scale for the Daughter/Son social role.

Directions:

In your packet, there are two envelopes marked *A* and *B*. You should keep the contents of each envelope separate and follow these instructions in the specified sequence.

Envelope *A*

1. You will need to work at a table surface for this activity.
2. Envelope *A* contains a set of index cards, each of which contains a statement called a “Strand Descriptor.” The envelope also contains four smaller white envelopes labeled with a Strand title and its definition. The Strand titles are:
 - Involvement
 - Activities
 - Perception/Attitude
 - Role Improvement

The Strand Descriptor provides a statement about a “participant,” which refers to the Daughter/Son who will be participating in the study by responding to interview questions.

- 3 Place the envelopes side by side on a table in front of you, and then look at each of the index cards and place it under the envelope marked with the Strand title that you think best matches the Strand Descriptor statement.

Example: You decide that the best match for the Strand Descriptor “Cleans house, does laundry for parent” is the Strand *Activities*. Place that index card with the *Activities* envelope.

- 4 When you have placed all cards with one of the four white envelopes, then place the cards inside the appropriate envelope and seal securely.
- 5 Place the four white envelopes in the *A* envelope.

Appendix E (Continued)

Envelope *B*

1. You will need to work at a table surface for this activity as well.
2. Envelope *B* contains small white envelopes each containing five index cards with Strand Descriptors printed on them. Work with only one set of cards at a time in order to keep the sets in tact.
3. Working with one set of cards at a time, remove the cards from the envelope and arrange them in a rank order, from lowest to highest level of role performance on a continuum; i.e., the card describing the lowest level of role performance would be the first card, the description of the next lowest role performance would be #2, and so on.. Please mark each card in the upper right hand corner with the number you have ranked it, with 1=lowest (weakest) and 5 =highest (strongest).
4. When you have marked the five cards in that set from 1 to 5, then put the cards back in its envelope and seal the envelope securely and place it back in Envelope *B*.
5. Repeat the rank ordering of Strand Descriptor cards in each small envelope, placing the envelope in Envelope *B* when you have completed the rank ordering of that set.
6. When all sets have been rank ordered and returned to Envelope *B*, seal Envelope *B*.

Returning Materials

You have been provided with an addressed, postage paid envelope. Please put both Envelope *A* and Envelope *B* into this envelope and return to me.

Thank you for your help.

Strands and Strand Descriptors

INVOLVEMENT

Frequency of Contact

1. Participant has little or no contact with parent(s).
2. Participant has occasional contact with parent(s).
3. Participant has a moderate amount of contact with parent(s).
4. Participant has frequent contact with parent(s).
5. Participant has very frequent contact with parent(s).

Frequency of Instrumental/Tangible Assistance Given

1. Participant never or almost never provides instrumental assistance to parent(s).
2. Participant provides occasional instrumental assistance to parent(s).
3. Participant provides regular instrumental assistance to parent(s).
4. Participant provides frequent assistance to parent(s).
5. Participant provides very frequent instrumental assistance to parent(s).

Frequency of Instrumental/Tangible Assistance Received

1. Participant never or almost never receives instrumental assistance from parent(s).
2. Participant occasionally receives instrumental assistance from parent(s).
3. Participant regularly receives instrumental assistance from parent(s).
3. Participant frequently receives instrumental assistance from parent(s).
4. Participant very frequently receives instrumental assistance from parent(s).

Frequency of Emotional Support Given

1. Participant never or almost never provides emotional support to parent(s).
2. Participant provides occasional emotional support to parent(s).
3. Participant provides regular emotional support to parent(s).
4. Participant provides frequent emotional support to parent(s).
5. Participant provides very frequent emotional support to parent(s).

Frequency of Emotional Support Received

1. Participant never or almost never receives emotional support from parent(s).
2. Participant occasionally receives emotional support from parent(s).
3. Participant regularly receives emotional support from parent(s).
4. Participant frequently receives emotional support from parent(s).
5. Participant very frequently receives emotional support from parent(s).

ACTIVITIES

Time

1. Participant never or almost never engages in activities involving parent(s).
2. Participant occasionally engages in activities involving parent(s).
3. Participant regularly engages in activities involving parent(s).
4. Participant frequently engages in activities involving parent(s).
5. Participant very frequently engages in activities involving parent(s).

Range of Activities

1. Participant engages in no or almost no types of activities with parent(s).
2. Participant engages in a few types of activities with parent(s).
3. Participant engages in some types of activities with parent(s).
4. Participant engages in many types of activities with parent(s).
5. Participant engages in a great many types of activities with parent(s).

Effort Expended in Activities

1. Participant expends no or almost no effort to engage in activity involving parent(s).
2. Participant expends modest effort to engage in activity involving parent(s).
3. Participant expends moderate effort to engage in activity involving parent(s).
4. Participant expends above average effort to engage in activity involving parent(s).
5. Participant expends great effort to engage in activity involving parent(s).

PERCEPTION

Importance of Role

1. Participant attaches little or no importance to her/his role as a Daughter/Son.
2. Participant attaches some importance to her/his role as a Daughter/Son.
3. Participant attaches moderate importance to her/his roles as a Daughter/Son.
4. Participant attaches considerable importance to her/his role as a Daughter/Son.
5. Participant attaches great importance to her/his role as a Daughter/Son.

Perception of Personal Benefit of Role Performance

1. Participant perceived little or no personal benefit to performing the Daughter/Son role.
2. Participant perceives some personal benefit to performing the Daughter/Son role.
3. Participant perceives moderate personal benefit to performing the Daughter/Son role.
4. Participant perceives considerable personal benefit to performing the Daughter/Son role.
5. Participant perceives great personal benefit in performing the Daughter/Son role.

Appendix E (Continued)

Satisfaction in Role Performance

1. Participant receives no personal satisfaction from her/his role as a Daughter/Son.
2. Participant receives little personal satisfaction from her/his role as a Daughter/Son.
3. Participant receives moderate personal satisfaction from her/his role as a Daughter/Son.
4. Participant receives considerable personal satisfaction from her/his role as a Daughter/Son.
5. Participant receives great personal satisfaction from her/his role as a Daughter/Son.

ROLE IMPROVEMENT

Frequency of Role Improvement Activity

1. Participant never undertakes activity intended to improve Daughter/Son role performance.
2. Participant occasionally undertaken\ activity intended to improve Daughter/Son role performance.
3. Participant regularly undertakes activity intended to improve Daughter/Son role performance.
4. Participant often undertakes activity intended to improve Daughter/Son role performance.
5. Participant very frequently undertakes activity intended to improve Daughter/Son role performance.

Perception of Need for Role Improvement Information

1. Participant perceives little or no need for information intended to improve Daughter/Son role performance.
2. Participant perceives some need for information intended to improve Daughter/Son role performance.
3. Participant perceives moderate need for information intended to improve Daughter/Son role performance.
4. Participant perceives considerable need for information intended to improve Daughter/Son role performance.
5. Participant perceives great need for information intended to improve Daughter/Son role performance.

Appendix E (Continued)

Letter to Pilot Panel Members

University of South Florida

Social Roles Research Project

Project Director

Wayne Blue James

Research Associates

Aracelis A. Rogers
Winfried Barthmus
Dana E. Cozad

February 2005

Dear [Panel Member],

Thank you for agreeing to participate in the University of South Florida Social Roles Research Project, providing assistance with the Daughter/Son social role. The task you will be performing is a *Q Sort* technique and will require about 20-25 minutes of your time. You will need a pen or pencil and will need to work on a table surface.

Complete instructions are enclosed. Should you have any questions, however, please call me at xxx-xxx-xxxx or on my cell phone xxx-xxx-xxxx. You may also contact me by email at Decozad5@aol.com.

When you have completed the tasks, please return all materials to me in the self-addressed, postage paid envelope provided. I would appreciate receiving the materials within one week, if at all possible.

Thank you for your help with this project and the development of the Performance Rating Scale for the Daughter/Son social role.

Sincerely yours,

Dana E. Cozad

Appendix F
Validation Panel Members

Appendix F (Continued)

Dr. William Blank
Adult, Career, and Higher Education
University of South Florida
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Workforce Education

Dr. Patricia Brewer
Adult Education/Community College Leadership
Walden University
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Adult Education, Educational Assessment

Dr. Ralph Brockett
Department of Educational Leadership
University of Tennessee
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Dr. Mack Davis
Director, Project Thrust
University of South Florida
Gender: Male
Race/Ethnicity: African-American
Professional Area: Adult Education

Dr. Vicky S. Dill
College of Education
University of Texas
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Educational Leadership

Ms. Sharon Grubis
Director of Institutional Research
Eckerd College
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Educational Measurement and Research

Appendix F (Continued)

Dr. Mark McCloskey
Dean, Bethel College and Seminary
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Ms. Marti Newbold
St. Andrews Presbyterian College
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Social Work

Dr. Aracelis Rogers
Institute for Lifelong Learning
University of South Florida
Gender: Female
Race/Ethnicity: Hispanic
Professional Area: Adult Education

Rev. Holly Shoaf-O’Kula, M. Div., M.S.W.
Associate Pastor
First Presbyterian Church, Aiken, SC
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Social Work with Older Adults

Dr. Margret Skaftadottir
Director, Program for Experienced Learners
Eckerd College
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Dr. Claire Stiles
Human Development Department
Eckerd College
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Human Development

Appendix G
Verification Panel Members

Appendix G (Continued)

Dr. Winfried Barthmus
Retired
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education/Social Roles

Dr. Sanaa Bennouna
Office of Curriculum and Medical Education
University of South Florida
Gender: female
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Dr. William Clyburn
Human Services Program,
Walden University
Gender: Male
Race/Ethnicity: African-American
Professional Area: Human Services

Ms. Diane Ferris
Director, International Education
Eckerd College
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Dr. James Frasier
Director, Continuing Education
Eckerd College
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Continuing Education

Dr. Michael Galbraith
Department of Leadership Studies
Marshall University Graduate College
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Appendix G (Continued)

Dr. M. Suzanne Kirkman
Department of Adult, Career and Higher Education
University of South Florida
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Adult Education/Social Roles

Dr. Jeffrey Kromrey
Department of Educational Measurement and Research
University of South Florida
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Measurement and Research

Dr. Naveen Malhotra
Faculty, Program for Experienced Learners and International Business
Eckerd College
Gender: Male
Race/Ethnicity: Asian
Professional Area: Adult Education

Appendix H

Correspondence and Instructions to Verification Panel Members for Performance Rating Scale

Verification Panel Instructions

Performance Rating Scale for Daughter/Son Social Role

In this research, certain activities and perceptions commonly associated with being an adult child of a living parent or parents are identified and studied. Four specific performance areas, called “strands,” are highlighted. These are *Involvement*, *Activities*, *Perception*, and *Role Performance*. The tasks associated with this Verification Panel contribute to the development of a Performance Rating Scale of the Daughter/Son social role.

There are two separate activities requested of you. The first is to perform a card sort to rank order descriptive statements. The second assesses the language clarity and completeness of the phrases.

An addressed postage paid envelope is enclosed for your use in returning materials.

PART ONE: Rank ordering of descriptive statements

Remove the contents of the envelope marked A. In this envelope you have sets of 5 index cards containing performance description statements together in 13 small envelopes. Please be careful to keep the cards in an envelope together; **they should not be mixed with other cards. The 5 cards include five performance rating descriptions.**

Working with one set at a time, remove the cards from the envelope and arrange the performance descriptions in order from low (weakest) to high (strongest).

Mark each descriptor card with a number 1 to 5 in the upper right hand corner, using the following scale. Each number should be used only once with each set of cards.

- 1=Low
- 2=Below Average
- 3=Average
- 4=Above Average
- 5=High

Collect the now-ordered statements in order from low on the top to high on the bottom and insert that group back in its small envelope. Seal the envelope securely and return it to the large envelope marked A. The rank order exercise is now complete.

Appendix H (Continued)

PART TWO: Assessing statement clarity and completeness

Remove the contents of the envelope marked *B*. This is a stapled set of pages containing all of the statements you rank ordered in PART ONE and a Likert-type scale for you to indicate your rating of the statement in terms of language clarity and language completeness.

Please rate each statement by circling the number reflecting your response. There is a space provided for you to suggest any improvements or make comments.

When you have completed the ratings for all statements, please return the stapled sheets to the enveloped marked *B*. Both envelopes *A* and *B* should be placed in the addressed, postage paid envelope and returned to:

Dana E. Cozad

If you have any questions, please call me at xxx-xxx-xxxx or xxx-xxx-xxxx; you may also email me at Decozad5@aol.com.

Thank you for your help!

PART TWO: Assessing Clarity and Completeness of Language

Directions: Below is a Likert-style scale ranging from **1** (Unclear) to **6** (Very Clear) used to rate for **statement clarity**. A second scale provides a range of **1** (not complete) to **6** (very complete) for rating the statement’s completeness. Suggestions for corrections or restatements may be made under “Additional Comments.” There are four sections of questions, each having to do with one strand, or performance area. The definition of the strand introduces the section.

STRAND: INVOLVEMENT—The frequency of contact with parent(s); the amount of time spent in contact with parent(s); and the extent to which the Daughter/Son is involved with important decisions in the parent’s(s’) life.

1. Statement--Daughter/Son never or almost never has contact with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

2. Statement--Daughter/Son rarely has contact with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

3. Statement--Daughter/Son sometimes has contact with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

4. Statement--Daughter/Son frequently has contact with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

5. Statement--Daughter/Son very frequently has contact with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

6. Statement--Daughter/Son spends little or no time being in contact with or being involved with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

7. Statement--Daughter/Son spends a limited amount of time being in contact with or being involved with parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

8. Statement--Daughter/Son spends a moderate amount of time being in contact with or being involved with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

9. Statement--Daughter/Son spends a considerable amount of time being in contact with or being involved with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

10. Statement--Daughter/Son spends a great amount of time being in contact with or being involved with parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

11. Statement--Daughter/Son has little or no involvement with important decisions about her/his parent's/parents' life.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

12. Statement--Daughter/Son has limited involvement with important decisions about her/his parent's/parents' life.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

13. Statement--Daughter/Son has moderate involvement with important decisions about her/his parent's/parents' life.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

14. Statement--Daughter/Son has considerable involvement with important decisions about her/his parent's/parents' life.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

15. Statement--Daughter/Son has great involvement with important decisions about her/his parent's/parents' life.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

STRAND: ACTIVITIES—The time spent in activities involving parent(s); the amount of assistance (physical, financial, and emotional) given to and/or received from parent(s); the range of different types of activities that characterize the involvement; and the effort the Daughter/Son makes to engage in activities with parent(s).

16. Statement--Daughter/Son never or almost never engages in activities involving parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

17. Statement--Daughter/Son rarely engages in activities involving parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

18. Statement--Daughter/Son sometimes engages in activities involving parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

19. Statement--Daughter/Son often engages in activities involving parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

20. Statement--Daughter/Son very frequently engages in activities involving parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

21. Statement--Daughter/Son gives little or no assistance to parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

22. Statement--Daughter/Son gives a small amount of assistance to parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

23. Statement--Daughter/Son gives a moderate amount of assistance to parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

24. Statement--Daughter/Son gives a considerable amount of assistance to parent(s).

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

25. Statement--Daughter/Son gives a great deal of assistance to parent(s).

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

26. Statement--Daughter/Son receives little or no assistance from parent(s).

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

27. Statement--Daughter/Son receives a small amount of assistance from parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

28. Statement--Daughter/Son receives a moderate amount of assistance from parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

29. Statement--Daughter/Son receives a considerable amount of assistance from parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

30. Statement--Daughter/Son receives a great amount of assistance from parent(s).

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

31. Statement--Daughter/Son engages in no or almost no different types of activities with parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

32. Statement--Daughter/Son engages in a few different types of activities with parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

33. Statement--Daughter/Son engages in a moderate number of different types of activities with parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

34. Statement--Daughter/Son engages in many different types of activities with parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

35. Statement--Daughter/Son engages in a great many different types of activities with parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

36. Statement--Daughter/Son expends no or almost no effort to engage in activity involving parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

37. Statement--Daughter/Son expends limited effort to engage in activity involving parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

38. Statement--Daughter/Son expends moderate effort to engage in activity involving parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

39. Statement--Daughter/Son expends considerable effort to engage in activity involving parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

40. Statement--Daughter/Son expends great effort to engage in activity involving parent(s).

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

STRAND: PERCEPTION/ATTITUDES—How the Daughter/Son feels about/perceives the importance of the Daughter/Son role and the extent to which she/he perceives personal benefit and satisfaction associated with performing the role.

41. Statement--Daughter/Son attaches little or no importance to her/his role as a Daughter/Son.

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

42. Statement--Daughter/Son attaches limited importance to her/his role as a Daughter/Son.

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

43. Statement--Daughter/Son attaches moderate importance to her/his roles as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

44. Statement--Daughter/Son attaches considerable importance to her/his role as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

45. Statement-- Daughter/Son attaches great importance to her/his role as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

46. Statement--Daughter/Son perceives little or no personal benefit to performing the Daughter/Son role.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

47. Statement--Daughter/Son perceives limited personal benefit to performing the Daughter/Son role.

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

48. Statement--Daughter/Son perceives moderate personal benefit to performing the Daughter/Son role

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

49. Statement--Daughter/Son perceives considerable personal benefit to performing the Daughter/Son role.

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

50. Statement--Daughter/Son perceives great personal benefit in performing the Daughter/Son role.

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

51. Statement--Daughter/Son receives no or almost no personal satisfaction from her/his role as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

52. Statement--Daughter/Son receives limited personal satisfaction from her/his role as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

53. Statement--Daughter/Son receives moderate personal satisfaction from her/his role as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

54. Statement--Daughter/Son receives considerable personal satisfaction from her/his role as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

55. Statement--Daughter/Son receives great personal satisfaction from her/his role as a Daughter/Son.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

STRAND: ROLE IMPROVEMENT—The Daughter/Son’s belief that she/he has a need for information to improve Daughter/Son role performance; the frequency with which she/he engages in pursuits intended to improve Daughter/Son role performance.

56. Statement-- Daughter/Son never or almost never undertakes pursuits intended to improve Daughter/Son role performance

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

57. Statement--Daughter/Son rarely undertakes pursuits intended to improve Daughter/Son role performance

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

58. Statement--Daughter/Son sometimes undertakes pursuits intended to improve Daughter/Son role performance.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

59. Statement--Daughter/Son frequently undertakes pursuits intended to improve Daughter/Son role performance.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

60. Statement--Daughter/Son very frequently undertakes pursuits intended to improve Daughter/Son role performance

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

61. Statement--Daughter/Son sees little or no need for information intended to improve Daughter/Son role performance.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

62. Statement--Daughter/Son sees limited need for information intended to improve Daughter/Son role performance.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

63. Statement-- Daughter/Son sees moderate need for information intended to improve Daughter/Son role performance.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

64. Statement-- Daughter/Son sees considerable need for information intended to improve Daughter/Son role performance.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

65. Statement--Daughter/Son sees great need for information intended to improve Daughter/Son role performance.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix H (Continued)

University of South Florida
Social Roles Research Project

Project Director

Wayne Blue James

Dr. [Panel Member]
[Address]

Dear Dr. [Panel Member],

Thank you for agreeing to participate in the University of South Florida Social Roles Research Project, providing assistance with the Daughter/Son social role. The tasks you will be performing are a Q sort to rank order performance statements and rating the performance statements on clarity and completeness. The tasks will require about 45 minutes of your time. You will need a pen or pencil and will need to work on a table.

Complete instructions are enclosed. Should you have any questions, however, please call me at xxx-xxx-xxxx or on my cell phone xxx-xxx-xxxx. You may also contact me by email at Decozad5@aol.com.

When you have completed the tasks, please return all materials to me in the self-addressed, postage paid envelope provided. I would appreciate receiving the materials within one week, if at all possible.

Thank you for your help with this project and the development of the Performance Rating Scale for the Daughter/Son social role.

Sincerely yours,

Dana E. Cozad

Research Associates

Aracelis A. Rogers
Winfried Barthmus
Dana E Cozad

Appendix I

Verification Panel Members for Interview Protocol

Appendix I (Continued)

Interview Protocol Verification Panel

Dr. Winfried Barthmus
Retired
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education/Social Roles

Dr. William Clyburn
Human Services Program,
Walden University
Gender: Male
Race/Ethnicity: African-American
Professional Area: Human Services

Dr. Michael Galbraith
Department of Leadership Studies
Marshall University Graduate College
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Dr. Jeffrey Kromrey
Department of Educational Measurement and Research
University of South Florida
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Measurement and Research

Dr. Naveen Malhotra
Faculty, Program for Experienced Learners and International Business
Eckerd College
Gender: Male
Race/Ethnicity: Asian
Professional Area: Adult Education

Dr. Mark McCloskey
Dean, Bethel College and Seminary
Gender: Male
Race/Ethnicity: Caucasian
Professional Area: Adult Education

Appendix J

Correspondence and Instructions to
Verification Panel for Interview Protocol

Appendix J (Continued)

Panel Instructions Interview Protocol

Four domain areas, or “Strands,” have been identified for the Daughter/Son adult social role. The strands are *Involvement, Activities, Perception, and Role Improvement*.

Interview questions have been proposed for each of these strands. These questions are listed, and below each is a Likert-type scale on which you are asked to rate that question in terms of its clarity and completeness. Please circle your rating for each question.

An addressed, postage paid envelope has been included in these materials for your ease in returning the materials to me.

Demographic Questions

3. Question

Do you have a living parent, step-parent, or parent-in-law?

Yes No. If no, terminate the interview and thank the respondent.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

4. Question

Do you live with any of your parents?

Yes In your home? In your parent’s home?

Other? (Specify) _____

No Are you a financially dependent student, with your own residence?

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

5. Question See below.

	Very Unclear		Very Clear
Clarity of Statement	1 2 3 4 5 6		
Completeness of Statement	Not complete 1 2 3 4 5 6		Very Complete
Additional Comments:			

FAMILY DEMOGRAPHICS

1. I am going to ask you now to identify the living parents you have and to tell me a little bit about them.

Name	Relationship	Age	Marital Status	Health	Financial Status	Employed?	State of Residence	Living Situation

Relationship P=Natural or adoptive parent S=Stepparent I=Parent-in-law **Marital Status**
M=Married W=Widowed D=Divorced S=Separated N=Never married

Health G=Good, no major concerns; active; no problems that interfere with daily living tasks
S=Stable, no current acute concerns; some limitations but generally capable of unsupervised daily living
L=Significant health problems; requires regular assistance and/or supervision with daily living tasks
F=Frail and failing health; requires constant assistance and/or supervision

Appendix J (Continued)

Financial Status S=Secure; no major concerns about long-term or immediate needs
 I= Independent financially; no need for assistance with immediate financial obligations
 O=Occasional need for financial assistance
 D=Dependent on regular financial assistance from family

Employed? Y=Yes U=Unemployed, seeking work N=Unemployed, not seeking work
 R=Retired

Living Situation (Indicate all that apply) A=Lives alone S=Lives with spouse
 D=Lives with spouse and dependent children
 I=Lives with spouse and adult child living at home
 R=Lives in retirement community, independently
 N=Lives in assisted living or nursing home

STRAND: INVOLVEMENT-- Amount of contact with parent(s), type of involvement (instrumental and emotional), direction of involvement (giving, receiving)

6. Question

How often do you have contact with at least one of your parents? Include telephone calls, letters, visits—any contact of any sort.

- Never or almost never; 1-3 times a year or less
- 3-11 times per year; less than once a month
- 1-3 times per month
- Once a week
- Several times weekly; daily

	Very Unclear				Very Clear	
Clarity of Statement	1	2	3	4	5	6
	Not complete				Very Complete	
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

7. Question

How often do you provide some kind of physical assistance to at least one of your parents?
 Examples would be help with transportation, a household chore, taking care of another family member (other children or dependent person in your parents' home), cooking, yard work, etc.

- Never or almost never; 1-3 times a year or less
- 3-11 times per year; less than once a month
- 1-3 times per month
- Once a week
- Several times weekly; daily

	Very Unclear			Very Clear		
Clarity of Statement	1	2	3	4	5	6
	Not complete			Very Complete		
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

8. Question

How often do you receive some kind of physical assistance from one of your parents?
 Examples would be help with transportation, a household chore, taking care of another family member (your children or dependent person home), cooking, yard work, etc.

- Never or almost never; 1-3 times a year or less
- 3-11 times per year; less than once a month
- 1-3 times per month
- Once a week
- Several times weekly; daily

	Very Unclear			Very Clear		
Clarity of Statement	1	2	3	4	5	6
	Not complete			Very Complete		
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

9. Question

How often do you provide financial assistance to at least one of your parents?

- Never or almost never; 1-3 times a year or less
- 3-11 times per year; less than once a month
- 1-3 times per month
- Once a week
- Several times weekly; daily

Clarity of Statement	Very Unclear		3	4	5	Very Clear
	1	2				6

Completeness of Statement	Not complete		3	4	5	Very Complete
	1	2				6

Additional Comments:

10. Question

How often do you receive financial assistance from at least one of your parents?

- Never or almost never; 1-3 times a year or less
- 3-11 times per year; less than once a month
- 1-3 times per month
- Once a week
- Several times weekly; daily

Clarity of Statement	Very Unclear		3	4	5	Very Clear
	1	2				6

Completeness of Statement	Not complete		3	4	5	Very Complete
	1	2				6

Additional Comments:

11. Question

How often does at least one of your parents seek your advice or emotional support about a decision or personal problem?

- Never or almost never; 1-3 times a year or less
- 3-11 times per year; less than once a month
- 1-3 times per month
- Once a week
- Several times weekly; daily

Clarity of Statement	Very Unclear		3	4	5	Very Clear
	1	2				6

Completeness of Statement	Not complete		3	4	5	Very Complete
	1	2				6

Additional Comments:

Appendix J (Continued)

Question

How often do you seek a parent's advice or emotional support about a decision or personal problem?

- Never or almost never; 1-3 times a year or less
- 3-11 times per year; less than once a month
- 1-3 times per month
- Once a week
- Several times weekly; daily

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

STRAND: ACTIVITIES— Includes the range of types of activities, the amount of time spent in activities with parent(s), and the amount of effort the respondent exerts to engage in activities with parent(s).

12. Question

Please see below.

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

Considering all your parents, please indicate how much total time during a typical month you spend in the following activities with your parents.

Activity	Less than 1 hour	1-3 hours	3-5 hours	6-8 hours	8+ hours
Talking/visiting in person					
Talking on the phone/emailing					
Shopping/dining out/movies/theater together					
Playing/watching sports; outdoor activities					
Traveling together					
Getting together for family events and holidays					
Eating meals together at home					
Doing household chores (house cleaning, yard work, repairs) for a parent					
Providing transportation of a parent					
Providing transportation of another household member (young child, other dependent family member) for a parent					
Shopping for a parent					
Providing advice					
Managing financial affairs					
Providing supervision/staying with parent who can't be left alone					
Providing direct physical care					
Attending medical appointments/dealing with health care providers					
Providing for meals, laundry					
Handling correspondence					
Other—specify					

13. Question

Overall, how would you rate the amount of your time and energy you spend in activities that you do with your parents or for your parents?

___ Not much ___ Some ___ About Average ___ More than most ___ A great deal

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

STRAND: PERCEPTION--Degree of importance of the Daughter/Son role to the respondent; perception of personal benefit to engaging in Daughter/Son role; degree of personal satisfaction gained from the Daughter/Son role.

14. Question

Thinking about all the responsibilities and activities you have, how important would you say your role as a daughter or son is to you in your life right now?

- Not important at all
- Not too important
- Moderately important
- Considerably important
- Extremely important

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6

	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

15. Question

Why did you rate yourself this way?

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6

	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

16. Question

Think about what you feel you receive from being a daughter or son now in terms of your own personal benefit. This can be tangible benefit or emotional and psychological benefit. How would rate the personal benefit you receive from the Daughter/Son role you play now?

- I feel no or almost no personal benefit at all.
- I feel some personal benefit.
- I feel a moderate amount of personal benefit.
- I feel considerable personal benefit.
- I feel great personal benefit.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6

	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

17. Question

What is the primary personal benefit you feel you receive?

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

18. Question

Overall, how much personal satisfaction do you feel about your role as a daughter or son?

- I receive no personal satisfaction from this role.
- I receive a little personal satisfaction from this role.
- I feel moderate personal satisfaction with this role.
- I feel considerable personal satisfaction with this role.
- I feel great personal satisfaction with this role.

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

19. Question

What is most personally satisfying to you in your Daughter/Son role?

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6
	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

STRAND: ROLE IMPROVEMENT--The extent to which the respondent has taken action in the past to improve role performance; the extent to which the respondent perceives the need for information or learning to improve role performance.

20. Question

People sometimes feel a need to learn something new or obtain new information in order to be able to perform certain roles better. Have you ever decided to learn something in order that you could be better at your role as a daughter or son? Some examples might be engaging in personal counseling to understand yourself better in relation to your parents, learned a new sport or activity in order to be able to do it with your parent, learned about a disease or illness your parent was experiencing, taken a class on managing your parent's financial affairs.

- No, never.
- Occasionally
- Regularly
- Often
- Very frequently

Give examples. _____

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6

	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

21. Question

To what extent do you feel that you have a need to learn something or gain more information about something related to being a daughter or son at this point in your life?

- Little or no need
- Some need
- Moderate need
- Considerable need
- Great need

	Very Unclear					Very Clear
Clarity of Statement	1	2	3	4	5	6

	Not complete					Very Complete
Completeness of Statement	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

22. Question

What kind of information or learning do you think would be helpful to you?

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

OVERALLCOMMENTS

23. Question

At this point in your life, what do you feel is the most important aspect of your role as a daughter or son in relation to your parents?

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

24. Question

Are there other comments you want to include in this discussion?

Clarity of Statement	Very Unclear					Very Clear
	1	2	3	4	5	6
Completeness of Statement	Not complete					Very Complete
	1	2	3	4	5	6

Additional Comments:

Appendix J (Continued)

Letter to Verification Panel Members—Interview Protocol
University of South Florida
USF

Social Roles Research Project

Project Director

Research

Associates

Wayne Blue James
Rogers

Aracelis A.

Winfried Barthmus
Dana E. Cozad

February 2005

Dear [Panel Member],

Thank you for continuing to participate in the University of South Florida Social Roles Research Project, providing assistance with the Daughter/Son social role. Your previous comments and feedback have been very helpful. I am asking for one more rating from you, this time on the latest version of the Interview Protocol, the instrument I will be using to gather the data for the study.

There are complete instructions enclosed with the feedback sheets. Should you have any questions, however, please call me at xxx-xxx-xxxx or on my cell phone xxx-xxx-xxxx. You may also contact me by email at Decozad5@aol.com.

When you have completed the tasks, please return all materials to me in the self-addressed, postage paid envelope provided. Again, I would appreciate receiving the materials within one week, if at all possible.

Thank you for your help with this project and the development of the instruments for the Daughter/Son social role.

Sincerely yours,

Dana E. Cozad

Appendix K
Field Test Panel

Appendix K (Continued)

Names of Field Test Panel Members

Dr. Larry Andrews
Retired School Psychologist
Gender: Male
Race/Ethnicity: Caucasian

Mr. David Brinkley, M.A.
Teacher, Aiken County, SC, Schools
Gender: Male
Race/Ethnicity: African-American

Dr. Elizabeth Purvis
Administrator, Aiken County School Board, Aiken, SC
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Educational Foundations

Dr. Melissa Riley
Department of Education
University of South Carolina, Aiken
Gender: Female
Race/Ethnicity: Caucasian
Professional Area: Educational Psychology

Ms. Nancy Reed, M.S.W.
Senior Services and Hospice Care Social Worker
Gender: Female
Race/Ethnicity: Caucasian

Appendix L
Demographic Form

DEMOGRAPHIC QUESTIONNAIRE
University of South Florida Social Role Research Study

Note: We will be using the information you provide for statistical analysis only. Your identity and personal information will not be revealed to anyone other than the researchers without your written permission.

Directions: Please respond to each item by checking the appropriate response or by providing the requested information.

1. **Gender:** Male Female

2. **Race/Ethnic Group:**

African American/Black/Negro Native American Indian

Asian Hispanic/Latino White (Caucasian)

Other (Please specify) _____

3. **Birth Date:** _____ **Birth Place:** _____
Month Day Year State or Country

4. **Current Marital Status:** Never Married Divorced Widowed
 Married Separated

5. **Number of children:** Number of children
 Number of children living at home

6. **Living Arrangements**

Which statement most clearly describes your living arrangements? (Check only one)

Single, living alone Married, living with spouse

Single, living with father/mother Married, living with spouse & children

Single, living with roommate(s) Living with children

Single living with significant Other (specify)

How many months of the year do you live in Florida? _____

Do not live in Florida In what state do you reside? _____

7. **Education:** Circle the highest grade (elementary/secondary) you have completed.

Appendix L (Continued)

a. K 1 2 3 4 5 6 7 8 9 10 11 12

b. Did you receive a high school diploma? ___ Yes ___ No

c. Did you receive a GED? ___ Yes ___ No

d. Circle the highest education level after high school you have completed (if any).

Vocational

College Freshman Sophomore Junior Senior

e. Indicate which college degrees, if any, you have received.

___ Associate ___ Bachelor's ___ Master's ___ Doctorate/Professional

___ Other (please specify) _____

8. Occupation:

a. Are you working now?

___ Yes, full-time (40 hrs./wk or more). Skip to question 8c.

___ Yes, part-time (39 hrs./wk or less) Skip to question 8c.

___ Yes, part-time, but semi-retired. Skip to question 8c.

___ No. Go to question 8b.

b. If you are not working, why not?

___ Retired ___ Can't find work ___ Student ___ Don't want a job

___ Married and stopped working outside the home

___ Stopped working to care for a family member. Who? _____

___ Other (please specify) _____

How long has it been since you worked? _____

Note: If you are self-supporting, answer questions 8 c and 8d with your occupation. If both you and your spouse/partner work, please also indicate his/her occupation. If you are being supported by your parents, list their occupation(s) in response to question 8e.

c. What type of work do you and your spouse/partner do now (or did you do before you retired or became unemployed)? Examples, nurse, personnel

Appendix L (Continued)

manager, supervisor of order department, automobile mechanic, cake decorator, teacher. Military officer, please indicate grade as well.

You _____

Spouse/Partner _____

- d. What are (were) your most important activities or duties while working (e.g., patient care, directing hiring policies, supervising order clerks, repairing automobiles, icing cakes)?

You _____

Spouse/Partner _____

- e. If financially supported by parents, what kinds of work do they do?

Father _____ Mother _____

9. Income:

- a. What was your total family income last year (2004)?

___ Under \$15,000 ___ \$15,000 to \$34,999

___ \$35,000 to \$74,999 ___ \$75,000 to \$99,999

___ \$100,000 to \$125,000 ___ Over \$125,000

- b. How many family members contributed to this income? ____

Thank you!

Appendix M
Informed Consent Form

ADULT INFORMED CONSENT FORM
The University of South Florida

**Contemporary Daughter/Son Adult Social Role Performance Rating Scale and
Interview Protocol: Development, Content Validation, and Exploratory
Investigation**

Dana E. Cozad, Person in Charge of Study
Dr. Wayne James, Major Professor

The following information is being presented to help you decide whether you want to be a part of a minimal risk research study. Please read carefully. If you do not understand anything, ask the Person in Charge of the Study.

You are being asked to participate in this study because you are an adult matching the profile necessary for inclusion in this study. Only adults 18-65+ years who are U.S. citizens are eligible to participate.

1. The purpose of this study is to examine the relationship between socioeconomic status, age, gender, and perceived performance in the Daughter/Son social role.
2. We will interview 150 adults, primarily in the Tampa Bay area; some respondents will also be from South Carolina, with a few other miscellaneous U.S. locations also contributing respondents.
3. We will interview you at your home, office, or location of your choice. The interview will take less than an hour.
4. With your permission, we will tape the interview using an audio tape recorder.
5. There are no known risks or personal benefits to being interviewed. Your participation, however, will benefit the larger society by contributing to our understanding of the Daughter/Son adult social role, thus informing educators planning for educational programs for that population.
6. We will not pay you for your participation in this study.
7. Your decision to participate in this study is voluntary. You are free to participate in this study or to withdraw anytime.
8. We will protect your privacy. Only the researcher and faculty advisor will have access to your interview responses and tape of the interview. They will be stored under lock and key. Names will not appear on any documents connected with this study other than this informed consent form. Authorized research investigators, agents of the Department of Health and Human Services and the USF Institutional Review Board and its staff, and any other individuals acting on behalf of USF, may inspect your records from this research project. The results of the study may be published in grouped form. In other words, the published results will not include your name or any other information that will identify you.
9. If you have any questions about this study, contact Dana Cozad at (xxx) xxx-xxxx. If you have any questions about your rights as a person who is taking part in this research, you may contact the Division of Research Compliance of the University of South Florida at (813) 974-5638

Appendix M (Continued)

Consent—by signing this form, I agree that:

< I have fully read (or have had read) and explained to me this informed consent form explaining my participation in this research study.

< I have had the chance to question the interviewer, and the answers were acceptable.

< I understand that I am being asked to participate in research. I understand the interview will be audio-taped. I understand the risks and benefits. I freely give my consent to participate in the study.

< I have been given a signed copy of this informed consent form, which is mine to keep.

(Signature)

(Printed Name of Participant)

(Date)

Investigator Statement

I carefully explained to the subject the nature of the above protocol. I hereby certify that to the best of my knowledge the subject signing this consent form understands the nature, demands, risks, and benefits involved in participating in this study and that a medical problem or language or educational barrier has not precluded a clear understanding of the subject's involvement in this study.

(Signature)

(Printed Name of Investigator/Interviewer)

(Date)

Institutional Approval of Study and Informed Consent

The research project and informed consent form were reviewed and approved by the University of South Florida Institutional Review Board for protection of human subjects. This approval is valid until the date provided below. The board may be contacted at (813) 974-5638.

Appendix N
Interview Protocol

Appendix N (Continued)

Interview Protocol
Daughter/Son Social Role
University of South Florida Social Roles Research

INTRODUCTORY QUESTIONS:

Note to Interviewer: If there is only one parent, please adjust the language appropriately throughout the interview.

2. Do you have at least one living parent, step-parent, or parent-in-law? Yes No

If you answered "No," has one of your parents (step-parents, parents-in-law) died within the last year? Yes
 No If yes, would you be willing to talk with me about your role as a [Daughter/Son] during the last year?
 Yes No

Note to Interviewer: *Please be sensitive to the difficulty that speaking about a recently deceased parent may present to the respondent. If there is no living or recently deceased parent whom the respondent feels comfortable discussing with you, terminate the interview and thank the respondent.*

Interviewer:

During this interview, you will be asked to tell me about being a [Daughter/Son]. This may have to do with being a natural or adopted child, a stepchild, or a [daughter-in-law/son-in-law] of your spouse's parents. I am interested in your experiences and activities as an adult child of your parent or parents. The questions will ask you to think about all of your living or recently deceased parents, including your natural or adoptive parents, your stepparents, and your parents-in-law. Some questions may not apply to your present situation, so just let me know that. You should think about your current situation during the last year in your answers.

There are no right or wrong answers, so please be as honest as you can be in helping me to understand what being the adult child of your parents is like. Remember that the information is confidential and will be used only for research about the experience of being an adult child in 2007.

3. Do you live with any of your parents?
 Yes In your home? In your parent's home?
 Other? (Specify) _____
 No
Does most of your financial support come from your parents? Yes No
If yes, are you a financially dependent student, with your own residence? Yes No

Appendix N (Continued)

FAMILY DEMOGRAPHICS

4. I am going to ask you now to identify the living parents you have and to tell me a little bit about them. Consider only **legal** relationships.

Note to Interviewer: You may give better educated respondents a copy of the answer codes below; there is a separate sheet with these codes with the

Answer Choice Card on the last two pages of this Interview Protocol.

Name	Relationship (Note if deceased within the last year)	Age	Marital Status	Health	Financial Status	Employed?	Lives how far away?	Living Situation

Relationship PM=Natural or adoptive mother PF=Natural or adoptive father SM=Step-mother SF=Step-father
MIL=Mother-in-law FIL=Father-in-law

Marital Status M=Married W=Widowed D=Divorced R=Remarried S=Separated N=Never married

Health G=Good, no major concerns; active; no problems that interfere with daily living tasks
S=Stable, no current serious concerns; some limitations but generally capable of unsupervised daily living tasks
L=Significant health problems; requires regular assistance and/or supervision with daily living tasks
F=Frail and failing health; requires daily assistance and/or supervision
I=Invalid; requires 24 hour health care and/or supervision for all daily living needs

Financial Status W=Wealth sufficient to provide for needs even if long-term health issues require substantial resources for care I=Independent financially; no need for assistance with *immediate* financial obligations; long-term health issues could jeopardize financial independence O=Occasional need for financial assistance D=Dependent on regular financial assistance from family or need-based government subsidies

Employed? FT=Fulltime PT=Part-time U=Unemployed, seeking work N=Unemployed, not seeking work
R=Retired RP=Retired, part-time work V=Volunteering

Lives how far away? Indicate approximate miles. If parent lives at least 4 months of the year near the Daughter/Son, write "P" and indicate closest mileage.

Living Situation (Indicate all that apply) A=Lives alone S=Lives with spouse
C=Lives with child in child's home
D=Lives with spouse and dependent children I=Lives with spouse and adult child living in parents' home
U=Unmarried, living with significant other
R=Lives in retirement community, independently N=Lives in assisted living or nursing home O=Other; specify _____

Appendix N (Continued)

Interviewer: Now I'm going to begin asking you questions about being a [Daughter/Son].

- 4 Choose three words that you think describe you as a [Daughter/Son].

INVOLVEMENT

Interviewer: I want to you think about all your parents you mentioned earlier as you answer these questions.

Note to Interviewer: If the respondent has indicated that there is only one living parent, please use the term “parent” and the singular verb rather than “parents” as you administer this protocol. Also, if the respondent indicated that a parent lives closer part of the year, ask him or her to respond in terms of the time when the parent lives closest.

- 5 How *often* do you have contact with at least one of your parents? Include telephone calls, letters, visits—any contact of any sort.
You may have daily contact, or maybe several times each week, or weekly, monthly, or only several times per year.

- 6 Now think about the *total amount of time* you spend being a [Daughter/Son] to your [parents/parent]. Considering all the different ways you have contact with your [parents/parent] and are involved in their lives, how much time would you say you spend on average? You may answer in terms of daily, weekly, monthly, or yearly. **Prompt:** Think about how much time you spend with them in all kinds of activities as well as the time you spend doing things for them.

7. When your [parents/parent] [are/is] considering important life decisions, how likely are you to be involved?

Note to Interviewer: Give respondent *Answer Choice* card and direct to Question #7 responses.

- ___ not at all;
___ to a very limited extent; I usually find out after the decision is already made
___ to a moderate extent; they will tell me they are thinking about a big decision
___ to a great extent; I am very involved in important decisions
___ to a very great extent; I make most of the important decisions for my parents

Explain how you get involved in these decisions. Are you asked for help or are you the one who has to take responsibility for the decisions about his/her/their life? Tell me about what happens.

PERCEPTION/ATTITUDE

Interviewer: Now I want to ask you some questions about how you feel about being a [Daughter/Son].

8. Thinking about your life right now, describe how *important* being a [Daughter/Son] is to you.

Appendix N (Continued)

9. I'm going to give you a card with five possible answers to the next question. Please tell me which one is your choice as the answer to this question:

Overall, of all the things you do in your adult life (working, being a spouse, being a parent, being a friend, being a part of organizations), how important do you think being a [Daughter/Son] is?

- It's the most important thing I do with my life now.
 It's in the top three things I do with my life now.
 It's about in the middle of all the things I do with my life now.
 It's not a very important part of the things I do with my life right now.
 It's not important at all compared to other things I do with my life right now.

Tell me why you chose this answer.

- 10 I want to ask you about the personal *benefits* you get from being a [Daughter/Son]. Tell me how you feel you benefit from being a [Daughter/Son]. **Prompt:** Some examples you might consider are enjoying their company, friendship and companionship, staying in touch with other family members, feeling good about paying back what they gave you, the kinds of help you receive, financial assistance, advice you get.

Which one of the things you mentioned is the most important one to you?

- 11 On a scale from 1 to 5 (1 being low, 3 being average, and 5 being high), how much personal *satisfaction* do you get from being a [Daughter/Son]?

Why did you choose that rating?

- 12 What do you think your [parents/parent] [expect/expects] of you as their [Daughter/Son]?

How well do you feel you meet their expectations?

Tell me why you answered this way.

- 13 Are there any expectations you think you're not meeting?

ACTIVITIES

Interviewer: Now I'll ask you about the ways in which you and your parents help each other and the things you do with your parents.

Appendix N (Continued)

- 14 Think about the help you *receive* from your [parents/parent]. What kinds of help—physical, financial, advice, or emotional support—do your parents give you?
- 15 If your parents do provide some help to you, how do you think they feel about helping you?
- 16 Now, tell me about the things you do to help your [parents/parent]. What kinds of help do you *give*? Think about all the kinds of help-- the physical help you give as well as financial help, advice, or emotional support you provide.

17. I want to know about the specific kinds of things you do with your parents. Now I want you to talk about just **one parent**, the one parent with whom you are most involved or have the most contact. Please indicate how much total time during an average week, month, or year you usually spend, in the following activities with that parent.

Which parent are you thinking about: _____

Note to Interviewer: 1. Be sure it is a parent on Family Demographic table (Question #4). 2. Skip items that are obviously not applicable and mark NA; e.g., if the respondent has already told you that this parent is frail and bed-ridden, there is no need to ask if they travel together.

Activity	How often do you do this activity? (Indicate if it is per week, month, or year.)						How much time do you spend when you do this each [day/week/month/year]?
Talking on the phone/emailing/Instant Messaging	day	week	month	year	NA		
Visiting in person	day	week	month	year	NA		
Shopping/dining out/movies/theater together	day	week	month	year	NA		
Playing/watching sports; outdoor activities together	day	week	month	year	NA		
Traveling together	day	week	month	year	NA		
Getting together for family events and holidays	day	week	month	year	NA		
Eating meals together at home	day	week	month	year	NA		
Corresponding with the parent/sending cards, letters	day	week	month	year	NA		
Sending packages to the parent	day	week	month	year	NA		
Doing household chores (house cleaning, yard work, repairs) for the parent	___ day	___ week	___ month	___ year	___ NA		
Providing transportation for the parent	day	week	month	year	NA		
Providing transportation of another household member (young child, other dependent family member) for the parent	___ day	___ week	___ month	___ year	___ NA		
Doing the parent's shopping for her or him	day	week	month	year	NA		
Providing advice to the parent	day	week	month	year	NA		
Managing the parent's financial affairs	day	week	month	year	NA		
Providing supervision/staying with parent who can't be left alone	___ day	___ week	___ month	___ year	___ NA		
Providing direct physical care to the parent	day	week	month	year	NA		
Attending medical appointments/dealing with health care providers with or on behalf of the parent	___ day	___ week	___ month	___ year	___ NA		
Providing for meals and/or laundry services for the parent	day	week	month	year	NA		
Handling the parent's correspondence	day	week	month	year	NA		
Sending packages on behalf of the parent	day	week	month	year	NA		
Running errands for the parent	day	week	month	year	NA		
Finding information or resources for the parent	day	week	month	year	NA		
Other-specify	day	week	month	year	NA		

Appendix N (Continued)

- 18 When thinking about the things you do with this parent, how much would you say you *like* doing these things?
- 19 Which of the things you mentioned do you like to do most?
- 20 Now please think about all your parents and all the different things you do as a [Daughter/Son]. On a scale from 1-5 (one being low, 3 being average, and 5 being high), how much **effort** would you say it takes for all the different things you do as a [Daughter/Son]?

Why did you rate yourself this way?

- 21 Describe some of the challenges or barriers you face when you're trying to make time for your parents.

ROLE IMPROVEMENT

Interviewer: Now I'd like to ask you about educational activities or other actions you might have considered or taken to improve the skills you need as a [Daughter/Son].

- 22 Have you ever (check answer)
- a. Read a book or article on being an adult child and the issues an adult child has to deal with concerning [her/his] parents?
 yes no
 - b. Taken a class or workshop about being an adult [Daughter/Son]? yes no
 - c. Watched a TV show about adult [Daughter/Son] issues about their parents and how to deal with them? yes no
 - d. Joined a support group for adult [daughters/sons] facing problems relating to being a [Daughter/Son]? yes no
 - e. Tried to learn more about a particular topic or problem because it was something you needed to know more about to help or understand your parents? yes no
 - f. Sought advice about how to improve your relationship with your parents? yes no
- 23 Is there anything else you've done to try to learn new things related to your role as an adult child?
- 24 **If** you needed to learn something new connected to being an adult child, what kind of things would you be most likely to do?

Appendix N (Continued)

Additional questions for those age 18-34

Note to Interviewer: If the respondent is in the younger age range (18-34 years of age), please ask these additional questions.

As a younger person, your relationship with you parents has probably changed as you entered adult life. These questions are about ways your relationship with your parent/parents may have changed now that you are an adult.

- a. If you are married, how has that affected what you do as a Daughter/Son of your parents?

- b. If you married, how has being a daughter-in-law or son-in-law affected your life?

- c. If you are a parent, how has that affected your role as a [Daughter/Son]?

- d. What do you think are the most important changes in relation to your role as a child of *your* parents?

OVERALL COMMENTS

25 At this point in your life, what do you feel is the most important thing about your role as a daughter or son in relation to your parents?

26 Is there anything important we haven't talked about?

Thank you very much for your help!

FOR THE INTERVIEWER

Describe the setting of the interview.

Were there outside influences or distractions during the interview? Please describe.

What additional comments/impressions do you have that might help in recording or tabulating this interview?

Appendix N (Continued)

ANSWER CHOICE CARD

Question #3 Family Demographics Answer Codes

Relationship PM=Natural or adoptive mother PF=Natural or adoptive father SM=Step-mother
SF=Step-father MIL=Mother-in-law FIL=Father-in-law

Marital Status M=Married W=Widowed D=Divorced R=Remarried S=Separated N=Never married

Health G=Good, no major concerns; active; no problems that interfere with daily living tasks
S=Stable, no current serious concerns; some limitations but generally capable of unsupervised daily living
L=Significant health problems; requires regular assistance and/or supervision with daily living tasks
F=Frail and failing health; requires daily assistance and/or supervision
I=Invalid; requires 24 hour health care and/or supervision for all daily living needs

Financial Status W=Wealth sufficient to provide for needs even if long-term health issues require substantial resources for care
I= Independent financially; no need for assistance with *immediate* financial obligations; long-term health issues could jeopardize financial independence O=Occasional need for financial assistance D=Dependent on regular financial assistance from family or need-based government subsidies

Employed? FT=Fulltime PT=Part-time U=Unemployed, seeking work N=Unemployed, not seeking work R=Retired RP=Retired, part-time work V=Volunteering

Lives how far away? Indicate approximate miles. If parent lives at least 4 months of the year near the Daughter/Son, write "P" and indicate closest mileage.

Living Situation (Indicate all that apply) A=Lives alone S=Lives with spouse C=Lives with child in child's home D=Lives with spouse and dependent children I=Lives with spouse and adult child living in parents' home U=Unmarried, living with significant other R=Lives in retirement community, independently N=Lives in assisted living or nursing home O=Other; specify _____

Question #7

- ___ not at all;
- ___ to a very limited extent; I usually find out after the decision is already made
- ___ to a moderate extent; they will tell me they are thinking about a big decision
- ___ to a great extent; I am very involved in important decisions
- ___ to a very great extent; I make most of the important decisions for my parents

Question #9

- ___ It's the most important thing I do with my life now.
- ___ It's in the top three things I do with my life now.
- ___ It's about in the middle of all the things I do with my life now.
- ___ It's not a very important part of the things I do with my life right now.
- ___ It's not important at all compared to other things I do with my life right no

Appendix O
Training Guide

Appendix O (Continued)

TRAINING GUIDE FOR DAUGHTER/SON SOCIAL ROLE INTERVIEWING PROCESS AND PROTOCOL OVERVIEW

Thank you for participating in the University of South Florida Research Team study of adult social roles and assisting with the Daughter/Son social role data collection. This guide and the training accompanying it will provide you with the information you need to

- Screen potential interviewees for appropriateness for inclusion in the study
- Conduct the interview according to standard processes, insuring consistency across interviews and among interviewers
- Rate the responses according to the Performance Rating Scale for the Daughter/Son Social Role.

Introduction. In order to conduct social research that yields coherent, consistent, usable, and unbiased information, training in administering and scoring of the survey protocol is crucial. The Interview Protocol for the Daughter/Son Social Role is a standardized survey instrument in which you must follow the wording and order of the primary questions (Phillips, 1971). You will be provided with probes if the respondent requires prompting in order to provide the requested information. Prior to conducting or scoring any interviews, training must be completed.

Training will focus on the following:

1. Obtaining required demographic information from respondents.
2. Obtaining required permission to conduct the interview.
3. Providing explanation of the purpose of the study
4. Applying screening criteria to determine if the respondent falls within the demographic profile of required interviewees.
5. Conducting the interview according to instructions, using specified questions and probes.
6. Conducting the interview in a non-threatening manner.
7. Obtaining accurate, honest information from respondents.
8. For those who will be scorers, application of the Performance Rating Scale for the Daughter/Son Social Role with inter-rater and intra-rater reliability.

Your Role. As an interviewer, your role is to:

1. Locate potential respondents.
2. Gather demographic information from the potential respondents.
3. Pre-screen potential respondents for appropriateness for inclusion.

Appendix O (Continued)

4. Administer the Interview Protocol for the Daughter/Son Social Role according to standard processes.
5. Thank the respondent for participating.
6. If you are a scorer, indicate your score for social role performance on specified dimensions.

Materials. For an interview, you will need:

Informed Consent Form
Demographic Form
Daughter/Son Social Role Interview Protocol
Tape recorder
Pens
If you are a scorer, Performance Rating Scale for the Daughter/Son Social Role

Conducting the Interview. The following considerations (adapted from Fink & Kosecoff, 1985) will, at a minimum, be utilized during the interview session.

Introduction. Briefly introduce yourself and the research. Example: “Hi, I am (your name) with the University of South Florida Social Roles Research Group. We are conducting social role research, and I would like to ask you some questions about your experiences as a daughter or son at this point in your life. Do you have a few minutes to talk with me?”

1. Demographic Information Sheet. Have the interviewee complete the Demographic Form, or you may assist with its completion. Emphasize that all information is confidential and will only be used for this research. Be sure that the Demographic Form is complete, especially checking for birthdate, education information, income information, occupational information, race/ethnicity information, and gender indication. If the interviewee is obviously outside the parameters for the quota sample, thank her or him and terminate the interview. During this portion of the interview, you will also determine if she/he has a living parent of a specified degree. Parents include natural and adoptive parents, step-parents, and parents-in-law. Those without a living parent as defined above will not be interviewed further.
2. Informed Consent Form. The Informed Consent Form is required to assure that the interviewee is aware of the purposes of the interview and has willingly consented to provide information. In this process, the interviewer also asks for permission to tape record the responses in order to allow more complete understanding and recording of the responses, should that information be needed for clarification at the time of scoring. If the interviewee does not give permission to record, you may continue with the interview without recording.

Appendix O (Continued)

3. **Introductory Questions.** The introductory questions will enable you to gather information about the parent(s) of the respondent and their circumstances. It will also allow you to help the interviewee to choose one parent about whom to answer more in-depth questions. Information includes geographic proximity to parents, health and marital status of parents and respondent, living circumstances of the parents and respondents, relationship of parent (natural, adoptive, step, or in-law), employment status of parent and respondent, and other family obligations of respondent.
4. **Conducting the Interview.** Ask questions in the order and using the wording provided on the Interview Protocol. If the respondent needs prompting to answer, use suggested probes to stimulate response. Remind the respondent that many of the interview questions pertain to the parent chosen as the subject of the interview, though some questions will ask for responses about all Daughter/Son role involvement with all parents .
5. **Flexibility.** The Interview Protocol is a standardized survey, and, as such, it is intended to be used with the wording provided. However, if provided probes do not yield sufficient information, the interviewer may offer additional probes or stimuli consistent with the original scope and intent of the question.
6. **Setting for the Interview.** Interviews will inevitably be conducted in a wide variety of settings and under different circumstances. However, the setting for the interview should provide an environment free of as many distractions as possible. It should also allow for the respondent to speak freely without fear of compromising the confidentiality of the information. You, the interviewer, may need to make adjustments for difficulty with language or vocabulary and impairment of hearing, speech, or sight. Every effort should be made to obtain reliable information that is offered under the optimal conditions for attention, thoughtfulness, and trust. If the circumstances under which the interview is conducted potentially interfere with or impact the interview in any respect, they should be noted at the end of the interview in the Notes. Others present during the interview should be noted.
7. **Interview Procedures.** Every Interview Protocol and Demographic Form should be coded with your Interviewer I.D. number. Please use your three initials and the interview number it is for you (i.e., your first interview is coded XYZ 1). If the interview is being taped, be sure the tape is working and that you indicate the interview code at the beginning of the tape and on the label on the case for the cassette tape.
8. **Demographic Scoring.** Each interview should be scored according to the respondent's age, SES, and gender. Age is determined by birth date and is calculated for the day the interview is administered. Gender is self-reported. SES is determined by a combination of income level, education, and occupation.

Income Levels:

Level 1	under \$15,000
Level 2	\$15,000-\$34,999

Appendix O (Continued)

Level 3	\$35,000-\$99,000
Level 4	\$100,000-\$124,999
Level 5	\$125,000 and over

Educational Levels

Level 1	Less than high school
Level 2	High school/GED
Level 3	Some college or post high school formal vocational training
Level 4	College graduate/Graduate degree
Level 5	Doctoral/Professional degree

Occupational Levels

See Nam-Powers-Boyd attachment in attachment for occupational categories and codes.

Interview Scoring Procedures. After completing the interview, a trained scorer will assess the interview against the stated criteria in the Performance Rating Scale for the Daughter/Son Social Role to determine a numerical value for role performance. For the sake of consistency, scoring should be completed while looking at specific criteria in the Performance Rating Scale in order to guard against drifting from the stated criteria. The Performance Rating Scale provides the bridge between the qualitative information provided in the interview and the quantitative numeric score upon which data analysis can be performed. The process for interview scoring is as follows:

1. Usually, the interviewer will be the first rater.
2. The second rater will be a trained rater of the opposite gender from the first rater.
3. If the ratings of the first and second rater are consistent at the same performance level, a score of the average of the two is assigned to that respondent.
4. When scores fall within different performance levels, a third rater of either gender will score the interview.
5. If the third rater's score falls within the same performance level as the opposite gender first or second rater, that score is averaged with the score of the opposite gender rater to yield the respondent's score.
6. If the third rater's score does not match the performance level of the opposite gender first or second rater, then a fourth rater of the opposite gender from the third rater scores the interview; if a performance level match is achieved across gender lines, then a usable score has been identified.
7. If after four raters, no gender-opposite performance level matches have been achieved, then the USF Social Roles Research Team will be consulted for consensus, regardless of gender, unless there is evidence of gender bias in the scoring (i.e., males and females consistently score differently).
8. If no consensus is found, then the interview is discarded as unusable.

Appendix O (Continued)

9. Consensus processes will be used primarily for difficult to find respondent categories.

The Performance Rating Scale. The following descriptions of performance levels provide the parameters for the scoring of the Interview Protocol.

Low Level 0-1

Involvement

Very low level of involvement with parent(s).

Has no or almost no contact with parent(s).

Never or almost never provides tangible assistance or help to parent(s).

Never or almost never receives tangible assistance or help from parent(s).

Never or almost never provides emotional support to parent(s).

Never or almost never receives emotional support from parent(s).

Activities

Extremely limited range of activities involving parent(s); activities are indirect (i.e., inquiring about the parent from someone else) or incidental (i.e., running into the parent at a store)

No or almost no time spent in activities involving parent(s).

Types of activities involving parent(s) are very limited and require no or almost no effort on the part of the Daughter/Son

Perception

Very low perception of Daughter/Son role importance.

Attaches no or very low level of importance to the Daughter/Son role in her/his life.

Perceives little or no personal benefit from performing the Daughter/Son role.

Receives little or no satisfaction from Daughter/Son role performance.

Role Improvement

Very low level of interest in role improvement activities

Has never engaged in activity intended to improve Daughter/Son role performance

Indicates no need for information to improve role performance.

Below Average Level 2-3

Involvement

Low level of involvement with parent(s).

Has occasional contact with parent(s).

Occasionally provides tangible assistance or help to parent(s).

Occasionally receives tangible assistance or help from parent(s).

Occasionally provides emotional support to parent(s).

Appendix O (Continued)

Occasionally receives emotional support from parent(s).

Activities

Relationship involves only occasional, low effort, and restricted types of activities.

Occasionally spends time in activities involving parent(s).

Engages in a few different types of activities involving parent(s).

Expend a little effort to engage in activities involving parent(s).

Perception

Low perception of Daughter/Son role importance.

Attaches a low level of importance to the Daughter/Son role in her/his life.

Perceives some personal benefit from performing the Daughter/Son role.

Receives some satisfaction from Daughter/Son role performance.

Role Improvement

Low level of interest in role improvement activities

Has only once engaged in activity intended to improve Daughter/Son role performance.

Indicates minimal need for information to improve role performance.

Average Level 4-5

Involvement

Typical level of involvement with parent(s).

Moderate amount of contact with parent(s).

Regularly provides tangible assistance or help to parent(s).

Regularly receives tangible assistance or help from parent(s).

Regularly provides emotional support to parent(s).

Regularly receives emotional support from parent(s).

Activities

Expected and usual engagement in activities with parent(s).

Regularly engages in activities with parent(s).

Engages in a moderate range of activities involving parent(s)

Activities include at least one high effort type of activity

.

Perception

Moderate perception of Daughter/Son role importance.

Attaches moderate importance to the Daughter/Son role in her/his life.

Perceives moderate personal benefit from performing the Daughter/Son role.

Receives moderate satisfaction from Daughter/Son role performance.

Appendix O (Continued)

Role Improvement

Moderate interest in role improvement activities

Has sometimes engaged in activity intended to improve Daughter/Son role performance

Indicates some need for information to improve role performance.

Above Average Level 6-7

Involvement

Considerable involvement with parent(s).

Frequent (weekly) amount of contact with parent(s).

Frequently (weekly) provides tangible assistance or help to parent(s).

Frequently (weekly) receives tangible assistance or help from parent(s).

Frequently (weekly) provides emotional support to parent(s).

Frequently (weekly) receives emotional support from parent(s).

Activities

Frequently engagement in many types of activities with parent(s).

Frequently (weekly) engages in activities with parent(s).

Engages in many different types of activities involving parent(s)

Activities include several high effort types of activity

.

Perception

The Daughter/Son role is of considerable importance.

Attaches considerable importance to the Daughter/Son role in her/his life.

Perceives considerable personal benefit from performing the Daughter/Son role.

Receives considerable satisfaction from Daughter/Son role performance.

Role Improvement

Considerable interest in role improvement activities

Has regularly engaged in activity intended to improve Daughter/Son role performance

Indicates considerable need for information to improve role performance.

High Level 8-9

Involvement

Exceptional level of involvement with parent(s).

Very frequent (several times weekly, daily) amount of contact with parent(s).

Very frequently (several times weekly, daily) provides tangible assistance or help to parent(s).

Very frequently (several times weekly, daily) receives tangible assistance or help from parent(s).

Appendix O (Continued)

Very frequently (several times weekly, daily) provides emotional support to parent(s).
Very frequently (several times weekly, daily) receives emotional support from parent(s).

Activities

High level of engagement in activities with parent(s).
Very frequently (several times weekly, daily) engages in activities with parent(s).
Engages in a wide range of types of activities involving parent(s)
Activities include many high effort types of activity

Perception

The Daughter/Son role is extremely important.
Attaches great importance to the Daughter/Son role in her/his life.
Perceives great personal benefit from performing the Daughter/Son role.
Receives great satisfaction from Daughter/Son role performance.

Role Improvement

Great interest in role improvement activities
Has regularly engaged in activity intended to improve Daughter/Son role performance
Indicates great need for information to improve role performance.

Points to Consider When Rating:

1. We are only interested in interviewing adults over age 18 who have living parents.
2. We are only interested in relationships that are with natural or legally adoptive parents, step-parents where one's natural or legal adoptive parent has remarried, and parents-in-law where the respondent is legally married to the child of a natural, adoptive, or step-parent.
3. Other relationships that are more informal or which do not involve relationships of legally married parents are not the subject of this study.
4. Most questions involve the current relationship or the relationship during the past year. Questions involving Role Improvement, however, do ask about activities in which one has engaged "ever."

Appendix O (Continued)

Strand and Sub-Strand Rating

The Interview Protocol and the Performance Rating Scale assess the Daughter/Son relationship across four areas or domains of role performance: Involvement, Activities, Perception, and Role Improvement. The first three strands also include sub-strands.

Strand—Involvement

Frequency of Contact: How often does the respondent have contact of any sort with her/his parent(s)? Lowest level may include even indirect contact through others. To what extent is the respondent involved in/with the life of her/his parent(s), as represented by the frequency of contact?

Instrumental/Tangible Assistance: Both giving and receiving instrumental/tangible assistance are included in this aspect of involvement. Generally, there will probably be a shift from receiving assistance or mutual giving and receiving assistance as the age of the respondent increases. However, there will be notable exceptions to this typical family life cycle pattern.

Emotional Support: Both giving and receiving emotional support are included as aspects in Daughter/Son involvement with a parent or parents. Emotional support may consist of advice, sharing problems or concerns, listening and talking about personal plans or goals, providing encouragement and unconditional love and respect. Respondent may describe this as simply “being there” for the other.

Strand—Activities

Time: Time in the Activities strand is meant to gauge the amount of time spent in specific activities. Whereas Frequency of Contact in the Involvement Strand is intended to indicate the level of involvement in a parent’s life, in the Activities Strand, time is a function of the level of demand upon the respondent’s limited time resource. The Activities Grid is meant to suggest common activities that might occupy the respondent, both as giver and receiver. By asking the respondent to indicate the amount of time spent in specific activities, we will be able to know the kinds of activities with parents that are manifested in the Daughter/Son social role at various life stages and circumstances.

Range of Activities: In this sub-strand we are looking for the extent to which the relationship between the respondent and her/his parent(s) is comprised of a limited number of activities or whether it includes a variety of different types of activities.

Effort: An important aspect of role performance is the level of effort the respondent exerts in the fulfillment of role responsibilities. Certainly, one who provides for the daily physical care of a parent expends great effort in performing her/his role. To what extent does the Daughter/Son role receive various performance levels, and does the effort change based upon the life stage or the respondent or parent?

Appendix O (Continued)

Strand—Perception

Importance of Role: To what extent is the Daughter/Son role of importance to the respondent? In her/his life, is this role significant or a major priority?

Perception of Personal Benefit of Role Performance: This sub-strand is intended to measure if the respondent feels there is any personal benefit to being actively engaged in Daughter/Son role performance. This is different from role importance because one may feel being an involved Daughter/Son is important to him, even though there is little personal benefit (e.g., staying involved with an elderly parent who is unable to provide any tangible or affective reward may be seen as both important but with little or no personal benefit.)

Satisfaction in Role Performance: The extent to which the respondent derives personal satisfaction from performing the Daughter/Son role. Regardless of personal benefit, does the role provide the intangible reward of satisfaction? Is the role one which is satisfying to the respondent?

Strand—Role Improvement

Frequency of Role Improvement Activity: Has the respondent ever engaged in an activity specifically intended to improve her/his Daughter/Son role performance? This could include classes to learn more about family functioning or adult development (if taken in order to improve role performance), personal/family counseling to improve one's relationship with a parent, classes about elder care in order to be able to deal with the needs of aging parents better.

Perception of Need for Role Improvement Information: Does the respondent see a need to learn something new that would improve her/his Daughter/Son role performance? Is there a perceived need for information or learning?

Thank you for your help.

Appendix P

Guidelines for Evaluating Activities and Role Improvement

Appendix P (Continued)

Guidelines for Evaluating Activity

These will help to put the activities in consistent levels. As always, there may be odd situations that will need to be accounted for, but generally, these guidelines will allow us to be consistent with ourselves and between us as we look at the Activity strand.

Frequency of contact:

Low	Every other month or less
Below Average	Around monthly
Average	About weekly
Above Average	Every other day
High	Daily

Number of Different Activities on the Grid:

Low	0-3 different activities
Below Average	4-6
Average	7-9
Above Average	10-12
High	13+

Hint: Take into account distance factors

Time Spent:

Low	Less than 25 hours per year
Below Average	26-59 hours total per year

Appendix P (Continued)

Average	60-99 hours per year
Above Average	100-174 hours per year
High	175+ hours per year

Hint: Include travel time when there is some distance to cover.

Guideline for Role Improvement

Role Improvement should never lower a Total score but may raise it.

Low	Nothing marked at all
Below Average	If respondent indicated a positive response to anything
Average	A couple of things indicated that he/she has done to improve
Above Average	Something fairly sophisticated—for example, research on a topic, consult with physician
High	Counseling, group support, taken a class

ABOUT THE AUTHOR

Dana Everett Cozad received her Bachelor of Arts in Literature from Florida Presbyterian College (now Eckerd College) in 1969. She received an M.S.W. from Florida State University in 1974. Her career has been in adult higher education, beginning with teaching social work part-time and then moving in administration. She served in the Eckerd College Program for Experienced Learners in several capacities, and became the director of the program in 1988. Since 2002, she has worked on grant projects and as an educational consultant. She has presented papers at national adult higher education conferences and at alternative teacher certification meetings.