

**LEAVING HOME IN LATE LIFE:
VOLUNTARY HOUSING TRANSITIONS OF OLDER ADULTS
AS GIFT GIVING PRACTICES IN THE MIDWESTERN UNITED
STATES**
by
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DEDICATION

For MKC, whose family and friends, local and non-local, gather to support her. This study on families, however defined, teaches us that in times of crisis, kindness and love reign.

For my parents, Merle and Jeanne Perry, who prepared me for a path that could never be foreseen.

For my husband, Richard Cooper, who has only ever wanted the best for me.

To my daughter, Emma, who will always be my travelling companion.

To my son, Ben, who makes us all laugh.

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TABLE OF CONTENTS

Dedication.....	ii
Acknowledgements.....	iii
Lists of Figures.....	x
List of Photos.....	xi
List of Appendices.....	xiii
Abstract.....	xiv
Chapter	
One: Introduction.....	1
1.1 Overview of Project.....	4
1.2 Project Description.....	11
1.2.1 Aims of the Project.....	11
1.2.2 Contributions of Project to Gerontology and Social Work..	12
1.2.3 Contributions to Anthropology.....	14
1.2.4 Study Site.....	14
1.2.5 Study Design.....	15
1.2.6 Study Sample.....	16
1.2.7 Sample Recruitment.....	19
1.2.8 Diversity Within Sample.....	19
1.2.9 Sample Limitations.....	20
1.3 Data Collection.....	22
1.3.1 Establishing Validity of Data.....	26
1.3.2 Analytical Approaches.....	27
1.4 Conclusion and Roadmap.....	27
Two: Voluntary Moves as Strategy: Decisions about functioning.....	34

2.1 Introduction.....	34
2.2 Strategic Decision-Making: Selection, Optimization with Compensation.....	35
2.3 Application of SOC Model to Project.....	38
2.3.1 SOC Application: Living in a Less Demanding Environment.....	39
2.4 Applications of the SOC Model to a Network.....	42
2.5 Intersections of SOC Model and Gift-giving.....	42
2.6 Aging Bodies: Strategic Alterations.....	44
2.7 Understanding Relocations.....	48
2.8 Moving Decisions: Strategic Reactions to Health Concerns.....	52
2.9 Application of Theoretical Frameworks.....	54
2.10 Conclusion	55
Three: Contexts and Reactions.....	56
3.1 Introduction.....	56
3.2 Study Contexts.....	57
3.2.1 Impact of the Global Financial Crisis on Study Participants.....	57
3.2.2 Availability of Senior Housing.....	62
3.3 Reactions to Contexts: Patterns and Processes of Moving.....	63
3.3.1 Awaiting Options.....	63
3.3.2 Varied Process of Moving.....	64
3.3.3 Relationships Between Buyers and Sellers: Spatial Stewardship.....	69
3.4 Application of Theoretical Frameworks.....	79
3.5 Conclusion.....	80

Four: Moving as a Gift.....	82
4.1 Introduction.....	83
4.2 Complexity of Moving.....	87
4.3 A Gift to Oneself.....	87
4.3.1 A Gift to Oneself: Navigating Spaces.....	87
4.3.1 A Gift to Oneself: Freedom From Home Maintenance...90	
4.3.2 A Gift to Oneself: Enjoying the Fruits of One’s Labor...99	
4.4 A Gift to One’s Partner.....	101
4.4.1 A Gift to One’s Partner: Partner’s Desire to Move.....	101
4.4.2 A Gift to One’s Partner: Honor Partner.....	107
4.5 A Gift to One’s Kin.....	110
4.5.1 A Gift to One’s Kin: Peace of Min.....	110
4.5.2 A Gift to One’s Kin: Freedom	113
4.5.3 A Gift to One’s Kin: Ease of Caregiving.....	115
4.6 Application of Theoretical Frameworks.....	116
4.6.1 Relationship to Gift-giving.....	118
4.7 Conclusion: Moves of Older Adults.....	118
Five: Moving as an Imagined Future.....	119
5.1 Introduction.....	119
5.2 Philosophy Behind Personalizing a House: Make it One’s Home..	123
5.3 Moving as a Time to Project Future Self.....	126
5.3.1 Emotional Projection.....	126
5.3.2 Health Projection.....	128
5.3.3 Financial Projection.....	128
5.4 Imagined Future: Personalizing Spaces as a Gift to Oneself.....	129

5.4.1 Porous Definitions.....	130
5.4.2 Modifications to Promote Choice.....	134
5.4.3 Modifications to Compensate for Present or Future Physical Challenges.....	145
5.4.4 Modifications to Promote Function.....	147
5.4.5 Modifications Based on Other Moves and Other Spaces.....	149
5.5 Application of Theoretical Frameworks.....	152
5.6 Conclusion.....	155
Six: Complications and Anxieties.....	157
6.1 Introduction.....	157
6.2 Dismantling a Household: Memories and Attachments.....	157
6.3 Dismantling a Household: Marks of Distinction.....	162
6.4 Dismantling a Household: Bargains to be Had.....	167
6.5 Dismantling a Household: Packing up Possessions.....	169
6.6 Redefining Roles, Redefining Spaces.....	177
6.7 Financial Complications: Unaffordability.....	179
6.8 Financial Complications: Redirecting Resources.....	186
6.9 Financial Complications: Cost of New Housing.....	192
6.9.1 Epilogue.....	196
6.10 Anxieties at Play.....	198
6.11 Application of Theoretical Frameworks.....	199
6.12 Conclusion.....	201
Seven: Unanticipated Adjustments.....	202
7.1 Unanticipated Adjustments.....	202

7.2 Adjustment: Age-graded Living Environments.....	202
7.2.1 Questionable Characteristics: Is this Senior Living?.....	207
7.3 Adjustment: Transition From Home Owner to Renter.....	212
7.4 Adjustment: Aesthetics of Home.....	215
7.4.1 Resident Wishes: Screen Doors.....	217
7.5 Adjustment: Not like I'd do it.....	219
7.5.1 The Custom Rental Paradox.....	220
7.6 Adjustment: Community Formation.....	221
7.7 Adjustments of Kin Network: Enchained Obligations.....	222
7.8 Application of Theoretical Frameworks.....	237
7.9 Moving as Liminality.....	230
7.10 Conclusion.....	232
Eight: Conclusion.....	233
8.1 Limitations of Research.....	234
8.1.1 Socioeconomic Homogeneity.....	235
8.1.2. Racial, Ethnic and Regional Homogeneity.....	236
8.1.3. Pace of Moving Process.....	237
8.1.4. Voluntarily Moving.....	239
8.2 Significance of Research.....	240
8.2.1 Importance of Language for Social Work.....	241
8.3 Theoretical Contributions of Research.....	243
8.3.1 Application of Baltes and Baltes' Selection, Optimization with Compensation Model to Project....	243
8.3.2 SOC Model and Networks.....	245
8.3.2. 1 Optimization from a Network Perspective.....	254

8.3.2.2 Compensations from a Network Perspective.....	247
8.4 Contributions to Anthropology.....	248
8.4.1 Contributions to the Gift-giving Literature.....	248
8.4.2 Other Contributions for Anthropology: Kinship, Temporalities and Material Culture.....	249
8.5 Contributions to Social Work.....	251
8.5.1 Intersections of Gift-giving and Social Work.....	251
8.5.2 Implications for Social Work Practice.....	252
8.5.3 Implications for Social Work Policy.....	254
8.6 Future Directions for Research.....	259
8.7 Concluding Remarks.....	260
Appendices.....	262
References.....	293

LIST OF FIGURES

Figure 1.1 – Map of Washtenaw County, Michigan.....	15
Figure 2.1 SOC Model: Selecting Living in a Less Demanding Environment.....	41
Figure 3.1 – CAD Drawing of Bedroom.....	71
Figure 3.2 – 1 st Page of Letter.....	72
Figure 3.3 – 2 nd Page of Letter.....	73
Figure 3.4 – Return Letter.....	75
Figure 3.5 – Items to be Given or Sold as Part of Move of Older American Couple...78	
Figure 4.1 – Spring and Moving Coming Soon.....	97
Figure 4.2 – Spring is Moving Season.....	98
Figure 4.3 – Winter is a new beginning.....	98
Figure 5.1—Estimated home values of study participants.....	121
Figure 5.2—Modifications Requests.....	139
Figure 5.3—Sketch of Door.....	151
Figure 6.1 – Mudroom in Relation to House	171
Figure 6.2 – Lighting Home for Safety.....	176
Figure 6.3 – No Money.....	180
Figure 8.1 – Interpersonal Application of Baltes and Baltes model.....	245

LIST OF PHOTOS

Photo 3.1 – Box Used for Moving Objects Daily.....	65
Photo 3.2 – Interim Move Décor.....	67
Photo 3.3 – A Life in Transition.....	67
Photo 4.1 – Cluttered Apartment.....	89
Photo 4.2 – Long Road.....	92
Photo 4.3– Painting Slashed by Nazis.....	108
Photo 5.1 – Display from Marketing Office Displaying Personalization Options...	132
Photo 5.2 –Personalized Kitchen in One Senior’s Residence.....	133
Photo 5.3 – Sink and Mirror Shape.....	136
Photo 5.4– “Wall cutouts” in Older Retirement Community to Remodel.....	144
Photo 5.5- Medicine Placed on Granite Countertop in Model Home.....	145
Photo 5.6- Medicine Placed on Corian Countertop in New Residence.....	146
Photo 5.7- Allergic to the Carpet Odor.....	148
Photo 5.8-Modification of Original House.....	150
Photo 5.9 – Door Resembling Past Residence.....	151
Photo 6.1 – Detailed List of Belongings.....	163
Photo 6.2 – Antique Map.....	165
Photo 6.3 – Real Maps?.....	166
Photo 6.4 – Garage Sale Dish.....	168
Photo 6.5 – Mudroom.....	170
Photo 7.1 – IKEA Table Added to Counter in Senior Living.....	208
Photo 7.2 – High Cabinet Shelves in Senior Living.....	209

Photo 7.3 – Foot Stool in Senior Living.....	210
Photo 7.4 – Cutouts of Furniture Rolled up in the Trunk.....	211
Photo 7.5 – Cutout of Table.....	211
Photo 7.6 – No screen doors.....	218
Photo 7.7 – Boxes with Objects in Circulation.....	223
Photo 7.8 – Key for Color-coding Labels.....	224

LIST OF APPENDICES

Appendix One: Survey instrument for semi-structured interviews with primary participants.....	262
Appendix Two: Survey instrument for semi-structured interviews with members of kin network.....	268
Appendix Three: Survey instrument for semi-structured interviews with professionals who work at the independent living community.....	274
Appendix Four: Contextual Background: Long-Term Care System in the United States.....	280
Appendix Five: Moving Tasks Schedule.....	286
Appendix Six: Weekly Repair List for Two Months.....	287
Appendix Seven: Family Room Furniture Inventory.....	288
Appendix Eight: Older Michiganian’s Day Brochure.....	290
Appendix Nine: Announcement of Research Project in Marketing Materials.....	291
Appendix Ten: Photo of Shower Door Hitting Toilet Seat in Retirement Community.....	292

ABSTRACT

This ethnographic network study investigates the processes of household disbandment and decision-making of older adults in the Midwestern United States relocating in post-Global Financial Crisis contexts. Interviews, participant observation and document review were conducted with over 75 older adults, their kin and involved professionals moving from January 2009 until May 2012. Stages observed were pre-move planning, move in-process, and post-move adjustment. Study participants moved to Continuing Care Retirement Communities (CCRCs), senior housing, condos and homes. This study utilized approaches from cultural and linguistic anthropology to analyze relocation.

Discourses of accessibility, mobility and activities of daily living often frame relocation studies. This dissertation offers gift-giving as the rationale for moving. While gifts may be transfers of property and assets, this dissertation examines a processual gift. Drawing on literatures on relocation and transitions, (Litwak and Longino, 1987; Wiseman, 1980; Turner, 1967; Van Gennep, 1909) and gift-giving (Mauss, 1925/1990), this interdisciplinary project primarily finds that 1) older adults view moves in terms of gifts to themselves, their partners and their kin. Evidence includes why moving is considered e.g. disease diagnosis, how these gifts are given, barriers to completing the gift of moving, and related obligations, complications and anxieties. Findings also include 2) the personalization practices of older adults contributing to the “circulation” (Appadurai, 1986) of senior housing as modifiable physical entities, 3) alternatives gifts

can be made if relocation is not completed and 4) post-move adjustments. Lastly, this project applies Baltes and Baltes (1990) gerontological theory of strategic functioning, i.e. the Selection, Optimization with Compensation (SOC) model, to living in a less demanding environment suggesting that 5) optimization can be extended to network members. Older adults may also experience optimization by increasing peer and kin contact and preparing for current and future health concerns.

By examining how older persons and their support network negotiate moves, this study identifies ways for social workers to support for older adults relocating at a practice and policy level. This study also analyzes the situated impact of the Global Financial Crisis and the intersections of relocation with gift-giving, material culture and kinship for of older Americans.

Chapter One

Introduction

“The philosophical and strategic reasons for our move, was, is, as I said, is quid pro quo, in that that we can help them with their children and we expect that they would be able to help us when we need help” -Mr. Lewis^{1,2}

“Yeah”-Tam

“due to age”-Mr. Lewis

“Yeah”-Tam

*“And so, in a way it’s a gift, or in a way, it’s a barter, if you will, it’s an exchange”-
Mr. Lewis*

“Okay, okay”-Tam

“Or it’s a gift”-Mrs. Lewis

“And they all understand that exchange”-Mr. Lewis

The above excerpt is taken from an interview with an older American couple, Mr. and Mrs. Lewis, who had moved across the country to live a couple of miles away from their adult

¹ Study participants names are pseudonyms to preserve confidentiality.

² Throughout this dissertation, I used a simple transcription format because other complexities such as turn-taking and pause structures were not part of my analysis. For a study with different aims, such as an investigation about older adults holding and maintaining the conversation, a more detailed transcript would be useful.

son's home. Mr. Lewis and Mrs. Lewis, ages 72 and 71 respectively at the time of their move, voluntarily left their hometown and relatives in hopes of a new life where they can care for others in the present and receive care in the future, if the need arises. Older persons often contribute in significant ways to their kinship networks and their communities, which displaces the popular, and at times, academic notions that older persons are solely recipients of care. Throughout this dissertation, I show the multiple ways older persons offer their emotional, physical and financial resources to others as well as well as receiving such resources from others in their support networks.

Mr. and Mrs. Lewis continue explaining the logics of moving at this particular time in their lives in the transcript³ below.

1. Mrs. Lewis: Yeah it's a gift to them right now for us to help them. Although
2. they help, come over and help us too. But it's also a gift to them
3. later that they won't have to go, um, halfway across the country.
4. Mr. Lewis: And pick up the pieces
5. Mrs. Lewis: And pick up the pieces
6. Mr. Lewis: When, if
7. Mrs. Lewis: From our lives
8. Mr. Lewis: If we, if we die.
9. Mrs. Lewis: If we need assistance or if we die.
10. Mr. Lewis: Clean up an estate, and
11. Mrs. Lewis: Yeah

³ Throughout this dissertation, interview transcripts are featured. Transcripts can be produced in various conventions, with each style embedded with ideologies about written and spoken language (Ochs, 1979). I have attempted to transcribe using the "imperfection" of the English language, marked by features such as pausing phrases like "um" (line 21) and restating of words and phrases "if we, if we die" (line 8). I have also included my own comments throughout the transcript to indicate the presence of the researcher in the interaction and where my own comments may guide the direction of the content of the conversation.

12. Mr. Lewis: and clean up all the,
13. Mrs. Lewis: We'll be right here=.
14. Mr. Lewis: all the, um goods.
15. Mrs. Lewis: We'll be right here.
16. Mr. Lewis: Oh it's a terrible thing.
17. Mrs. Lewis: It's still not easy, it's still not easy to clean up after somebody dies
18. or somebody goes into a home. You've got mountains of stuff.
19. Tam: Right.
20. Mrs. Lewis: Plus all the financial stuff plus all the emotional stuff to deal with
21. Um, it's just, but it is easier if they're right here.
22. Tam: Yeah, yeah.
23. Mrs. Lewis: It's just too hard to go across country and do it.
24. Mr. Lewis: And I think a lot of people don't move because of inertia
25. Tam: Uh-huh
26. Mr. Lewis: And comfort factor. I don't want to move. I'm comfortable here. It
27. fits my needs. I don't want to move. Move is a lot of problems.
28. Mrs. Lewis: It is a lot of problems. It's hard work.

The couple speaks from previous experience of caring for older relatives when they emphasize the work it takes to clean up a loved one's possessions. They also understand the stasis or "inertia" in Mr. Lewis' terms (line 24) that prevents others from undertaking spatial transitions. Often, it is difficult to uproot; one's housing may fit current health, safety and happiness criteria.

Yet, the Lewis' have chosen a path of relocation. They view their move as a gift to their descendants so that they will not have to travel across the United States, before or after their

deaths. They project a future health status for themselves and they project the difficulty their health status could cause for loved ones. They have decided to act on the future, now, with moving as a “present” to their kin.

1.1 Overview of Project

This dissertation project follows older Americans on their journeys of relocation in the Midwestern United States. Participants in this study voluntarily engaged in moving and directed their own moves. Their control, or agency, evident in the moving process, contributes to the key finding of this study. Despite the work entailed, some older people are emotionally motivated to relocate because they consider moving a gift, to themselves or to others in their support networks. Unlike literature that frames moving as a reaction to present and future losses, I use the analytical lens of the terms of gift-giving and reciprocity to understand the experiences of the participants in this study.

This project views gifts as more than specific objects and instead looks at the process of moving itself as a gift. There are other processes that can be understood in gift-giving terms, such as the disciplining of children or caring for hospice patients in which human actions are the gift (see also Elana Buch’s 2010 work on how home care workers learn to cook favorite foods of their clients as a way to sustain their personhood).

In this project, the process of moving serves as the gift.⁴ Throughout this dissertation, I provide examples of actions of older people and their kin that can be understood as gift-giving. I use gift-giving as a lens for the entire process of moving in this project. Embedded in this gift is

4

the circulation of material objects, writ large. Instead of focusing on a single substance, like a heart transplant from one person to another, in the process of moving an exchange of residences occurs as well as changes in the contents of the house. In a way, what I am describing can also be classified as a “total system of giving.” In her work on the Kula, Munn (1992) argues that the relationship between various islands is constructed, or rather in her words, “contracted” or “expanded” to involve multiple items.⁵ In this project, homes and their contents follow the construction of selves and relationships with kin in a “total system” of giving.

In “The Gift,” Marcel Mauss also describes how gift exchange practices involve multiple types of objects and multiple persons. While gifts may often be given as if they are disinterested,⁶ Mauss maintains that embedded in gift-giving are three obligations 1) to give gifts 2) to receive gifts and 3) to reciprocate gifts (1925/1990, p. 13). Mauss claims that what appears voluntary is often not. He argues, “the gift necessarily entails the notion of credit” so that gifts exchanges are always expected (p. 36). Comparing gifts with poison, Mauss emphasizes that there is great danger in giving and receiving gifts because of the expected return of the gift (p. 63).

Gift exchange can work to cement relationships. In this project, gifts of moving cements older adults’ relationships with partners and kin, as well as relationships with perceived future selves. Additionally, in the introduction to “The Gift,” Mary Douglas explains that this “means that each gift is part of a system of reciprocity in which the honour of giver and recipient are

⁵ Her primary focus is on how individuals are “expanded” or “contracted.”

⁶ Disinterested is better understood given Mauss’ definition of interest---which is “the individual search after what is useful” (p. 73).

engaged. It is a total system in that every item of status or of spiritual or material possession is implicated for everyone in the whole community. The system is quite simple; just the rule that every gift has to be returned in some specified way sets up a perpetual cycle of exchanges within and between generations” (viii).

Marcel Mauss drew on data from cultures around the world in developing his theory of gift giving. The Maori concept of *hau*, or “the spirit of things,” is said to lie in each thing (*taonga*). Through the ethnographic example of the Maori, Mauss captures an important tenet of gift-giving, that gift-giving creates obligation. A Maori informant explains that “The taonga that I received for these taonga (which came from you) must be returned to you” (1925/1990, p. 11). Mauss explains that “what imposes obligation in the present received and exchanged, is the fact that the thing received is not inactive. Even when it has been abandoned by the giver it still possesses something of him” (pp. 11-12). He further explains that “in Maori law, the legal tie, a tie occurring through things, is one between souls, because the thing itself possesses a soul, is of the soul. Hence it follows that to make a gift of something to someone is to make a present of some part of oneself” (p. 12).

Therefore, recipients of gifts feel the need to reciprocate in similar, and/or creative ways. Thus, gifts create obligations to make counter-gifts. The obligation to give and to receive all stem from the need for the *hau* of an object to “return to its birthplace” according to Mauss, and to “refuse to give, to fail to invite, just as to refuse to accept, is tantamount to declaring war” (1925/1990, p. 13). As we will see throughout this dissertation, kin are involved in receiving gifts and reciprocating their own gifts. Reciprocation is expected not only in Maori society, but in many other gift-giving practices around the world. For this project set in the Midwestern United States, gifting of objects creates the obligation for the receiver to care for the objects.

The process of moving, viewed as gift, also creates obligations to those whom the move was intended to benefit. Thus, in the moving practices of older adults, gift-giving often incorporates existing kin networks, creating and re-creating social relationships in the process. One of the ways the relationships are sustained is through a temporality established between the gift made and its reciprocation, which can take many forms. Gift giving creates temporal relationships for older adults themselves, in the form of reciprocity extending between a present self and a future self, living in a new environment. The temporality of reciprocity may also be extended to the relationship between those living and those dead. For example, there may be a way in the moving process to honor a departed spouse. The temporalities of reciprocity also extend between generations within families, as older adults and their kin, usually adult children, continually engage in a gift-giving relationship while negotiating caregiving and inheritance of financial assets and material objects.

I also draw on the work of Charles Sanders Peirce in contemplating the connections between the gift of moving, and the givers and recipients. In his analyses of semiotic processes or signs, he suggests that a “sign or *representamen*, is something which stands to somebody for something in some respect or capacity” (1955, p. 99). In other words, signs have meanings for somebody, which provides that possibility for signs to have different meanings for different persons or beings that might witness the same sign.⁷ Peirce argues that there are three different types of signs: the icon, the index and the symbol. Icons⁸ “involve formal resemblance.” For

⁷ For instance, viewing an American flag could have different meanings for a recent immigrant, a veteran, and a school child. The immigrant could see the object, the flag, as representing freedom, a veteran could see the object as representing the loss of colleagues, and a school child could see a flag as representing the beginning of the school day, which often may start with recitation of the pledge of allegiance.

⁸ In Peirce’s terms, an icon refers “to the Object that it denotes merely by virtue of characters of its own, and which it possess, just the same, whether any such Objects actually exists or not” (1955, p. 102). While indices do not have resemblance to an object, indices direct “the attention to their objects by blind compulsion” (1955, p. 108).

example, an icon or a picture of a mountain with falling rocks using the shapes of a mountain and rocks may be pictured on a yellow road sign. Unlike resemblances seen in icons, indices involve “actual connections” (Parmentier, 1994, p. 19). Using the same example of the road sign with the mountain and falling rocks, the sign also functions as an index, pointing to the existence of an actual mountain with the potential for falling rocks nearby. By seeing the sign, the reader knows that an actual mountain is nearby. The last type of sign is a symbol that involves “conventional associations” (Parmentier, 1994, p. 19), or shared agreements, either legally or socially shared, about the meanings of the symbols. In this case, yellow, triangle-shaped, metal signs are conventionally known to be signs that persons should evaluate for possibilities of danger. Signs, as icons, indices or symbols, exist everywhere. Interpretation of signs happens everyday, sometimes below the threshold of recognition.⁹

In this project on homes, spaces, and transitions, signs are everywhere. The objects that are passed down intergenerationally, such as sterling silver and china, and the everyday objects like children’s toys, are part of the host of possessions that Americans own. Photos, teapots, and woodworking tools are icons of places visited and souvenirs collected, and indexical links to hobbies, occupations, and family relationships.

The act of moving itself can operate as a sign, and in this project, I argue that moving can be interpreted as a gift, indexing a preparation for the next phases of life, and pointing towards the relief of not feeling “overhoused” (Carpenter et al., 2007, p. 178). These indexical links that occur throughout this project, are part of the complicated connections between the act of moving,

⁹ Driving requires the recognition of conventional signs, such as red, yellow and green colors to indicate suggested speeds. For the most part, drivers do not contemplate how to interpret the color variation each time a stoplight is seen.

older adults as the givers of gifts, and gift recipients themselves invoking a future self. Also, partners and kin also indexically link the process of moving to gifts of “peace of mind” and “freedom” from caregiving responsibilities, as well as pointing towards new responsibilities of caregiving such as when an older adult moves to be near an adult child for the first time in five decades.

Richard Parmentier (1994) suggests that these semiotic relationships “are fascinating precisely because they [suggest] the possibility for creativity” (p. 14). There is creativity in how moves are undertaken, what choices and paths are chosen. There is also ingenuity in how older adults and their family members interpret the meanings of physical objects in deciding whether to sell them or bring them to their new residences, as well as how older adults plan for the appearance of the new space, with objects, layout plans of the objects and modifications to the physical structure of the residence itself.

Additionally, the conversations about moving, at original homes and at new residences, whether held publicly among groups of older adults or privately in whispers, are all signs to be analyzed and interpreted. However, it is important to always remember that people talk about certain topics and omit explicit talk about others. Throughout this dissertation, I feature transcripts of conversations, with detailed analysis of what words and phrases mean and point towards, such as how a conversation about light bulbs might point towards a role renegotiation between older parents and adult children. Enhanced by understanding the contexts and relationships of speakers, the content of conversations serves to unveil larger issues at stake and the strategies of the speakers (Carr, 2011).

The conversations also serve to illuminate the intricate ways in which individuals speak. Jane Hill and Ofelia Zepeda (1993) argue that “much of linguistic structure itself may be ideologically quite neutral; we must consider the possibilities that ideologies of the self are founded, not on what is intrinsic in linguistic structure, but upon what our cultures invite us to notice on it” (1993, p. 223). In this case, the invitations include attention to the ways people speak about their pasts and their futures, invoking perhaps a future self. Vincent Crapanzano (1996) argues, “Narratives of the self are more than a story, a chronology, a history of the self (however defined); they are taken to be a means of knowing the self” (p. 108). By telling their stories to me, and others, during the process of moving, study participants work to envision and create their lives and relationships for life in new residences. Their stories can be full of different types of selves, an “emotional” self who loves their home and does not wish to move, and a “responsible self” who plans for his own death by making plans for his wife’s in the future.¹⁰

Vincent Crapanzano continues, “dialogue is never dyadic; for even when only two are conversing, they are always making reference to—struggling with—a third, that authority giving function that governs the conventions of the dialogue... This third may be understood as law, grammar or tradition; it may be embodied in a person, a god of the state” (p. 125). In this project, the authorities that are referenced may be social norms as well as other family members, retirement community personnel and even academics who would read their life stories.

Because I am a student of both social work and anthropology, this interdisciplinary dissertation connects theories and methodologies of anthropology and geriatric social work. The

¹⁰ In this section, I refer to Jane Hill’s essay, “Voices of Don Gabriel,” where she demonstrates through analysis of ways of speaking of her key informant, the various “selves” evoked in his speech, evaluated by his lexical choices and flow or dysfluency of narratives. These selves have differential responsibilities associated with their conversational styles.

emphasis on language use in context, throughout this dissertation, builds on my training in linguistic anthropology. Linguistic Anthropology views conversational practices as cultural practices to be analyzed. Keating and Egbert (2004) write, “Conversation is a vital resource for anthropologists in their goal to understand a society from the local perspective; what it means to be an ethnographer is to participate in many “ordinary” conversations (p. 169). The ordinary conversations construct new realities for the persons in this study; as they talk about moving, they are also talking about unpredictable financial systems, changing family roles, and the aging process. This study aims to analyze these conversations with the aim of enriching the lives of older persons through social work practice and policy.

Understandings of the process of moving, its stakeholders and stakes, illuminate the lives of older Americans at transition moments and the potential roles for social workers in the housing transitions of older adults. Social work and anthropology both track the lived experiences of individuals, analyzing persons’ embeddedness in larger systems and structures (Bourdieu, 1977; Alinsky, 1971).

1.2 Project Description

1.2.1 Aims of the Project

This research will contribute to understanding how families negotiate transitions and will inform social workers about how to better support older adults to maintain their voices. “Maintaining a voice” is defined for this project as preserving one’s autonomy and wishes during the moving process and post-move adjustment. For anthropologists, this project informs theories of material culture, or the meanings of objects, and kinship, as this is a study of American families. Additionally, the project contributes to research in linguistic anthropology. The first

research question focuses on the processes of moving, utilizing the Baltes and Baltes (1990) Selection, Optimization with Compensation (SOC) model as a theoretical framework (described in Chapter 2), and the second research question focuses on the conversational practices involved in moving experiences.

The research questions are as follows:

1. *What are the processes of disbanding their homes and recreating new ones for older adults?*

1a. How does the “selection” of this type of living arrangement “optimize” the current and future functioning of older adults?

1b. How does moving “compensate” for current or impending loss of functioning of older adults?

2. *How do older people, their kin and involved professionals talk about moving?*

2a. How are the moves of older adults negotiated with network members?

2b. Are there unique ways of speaking about moves utilized among kin networks?

1.2.2 Contributions of Project to Gerontology and Social Work

There are four contributions from this research that could improve the experiences of older persons as they plan and execute moves. First, the qualitative design of my study documents the broader economic challenges and multiple challenges of moving for older adults. Moving involves economic, social service and long-term care systems. This project provides accounts of older persons navigating these systems to better understand the barriers to information and support that may exist.

Second, this study contributes to what we know about Continuing Care Retirement Communities (CCRCs), which offer the protective assurances of aging in place. This study contributes to understanding how people make decisions to move into CCRCs, how well they can accommodate an individual's housing needs, and how the transition to such a community occurs. Close examination of the talk and actions of professionals working in CCRCs enhanced understanding of the ways such professionals help to transition older adults into these communities and how professionals manage the diverse needs and interests of residents.

Third, understanding the process of moving contributes to research on the dynamic ways older adults work with others to “select” domains to “optimize” their functioning, and the ways older adults “compensate” by involving kin and professionals in various ways throughout the moving process (described later in the chapter). Utilizing the SOC model, this research examined the SOC model over time and highlights the interpersonal nature of older adults' moves.

Fourth, embedded in the project is a commitment to documenting conversational practices about moving between older adults, their kin and involved professionals. This research contributes to documenting older adults as active decision makers and highlights the multiple roles that kin play in moving. By understanding how goals are negotiated and conflicts are resolved as well as left unresolved, this project highlights the complexities of relationships between older adults and their kin. Also, this study informs current work on the discursive practices of clients and professionals (Carr, 2006; Briggs and Mantini-Briggs, 2003). Social work, as a helping profession, is defined by its skilled professionals who “talk” in roles as advocates and brokers of services. Yet, social work courses on interventions often do not include precise examinations of discourse or the theoretical and methodological approaches

employed by linguistic anthropologists. Understanding that language acts both as a response to behaviors and also influences other behaviors, as well as understanding linguistic practices and recognizing linguistic patterns present within families, will contribute to more effective interactions between social workers and older persons and their families.

1.2.3 Contributions to Anthropology

This project contributes to anthropology in several ways. First of all, it contributes to the gift-giving literature by arguing that the moving practices of older Americans can be understood in terms of the concept of gift. This project also contributes to understanding how kin relations are sustained through the process of moving. The sustaining of kin relations can be both beneficial and disadvantageous, as kin may become involved in moving and in supporting the older persons after the move. By investigating both gift-giving and kinship relationships, understanding the extension of temporalities in an American intergenerational context becomes another area of contribution. Finally, the project informs the field of material culture by contributing to understanding meanings of ownership and possessions of older Americans. Ownership in this case applies to homes and objects within them.

1.2.4 Study Site

My research site was set in a college town in the Midwest and surrounding areas of 50 miles. Ann Arbor is a town of approximately 115,000 people (US Census Bureau, 2000). Washtenaw County, the county in which Ann Arbor is situated, has the second highest median

family income in the state of Michigan (Economic Research Service, 2009). With about 65,000 older adults (ages 55+) in Washtenaw County (Blueprint for Aging, 2009), Ann Arbor is often viewed as a desirable place to retire. Recently, the American Association of Retired Persons named Ann Arbor the healthiest hometown for retirement (Mahoney and Edmondson, 2008).

Figure 1.1 – Map of Washtenaw County, Michigan



1.2.5 Study Design

The project utilized a panel design where I attempt to follow older persons and their network through three stages of moving: 1) pre-move planning, 2) move in-process, and 3) post-move adjustment. These three stages are not always discrete, as described in the moving experiences throughout the dissertation. Conceptually, the three stages served to distinguish those older adults who “completed” a move from those who were only engaged in the pre-move planning but did not undertake a move, and those who I interviewed after their moves in their post-move adjustment phase.

Data was collected from January 2009 until May 2012. The length of the data collection period reflects both the experiences of study participants who spent considerable time preparing before executing their moves, and the open-ended nature of post-move adjustment to their new residences, which continues on for many residents. The data collection phase also reflects a disciplinary approach of anthropology, where prolonged engagement offers an opportunity for the researcher to build relationships in order to witness and participate in unfolding processes.

1.2.6 Study Sample

This project was designed to understand the moving experiences of older Americans from three perspectives: those of the older adults (n=78)¹¹, their kin (n=49), and professionals supporting the move (n=46). The primary participants were the older adults, either single adults or couples where both agreed to participate.

Kin included adult children and their partners, nieces, and grandchildren. Siblings of the primary participants were also counted as kin, as well as neighbors and friends who older adults identified as close to them in the move. Professionals were identified as those who supported the older adults in the moving process over any or all of the three phases.

The older persons in the study served as the contact points for their moving experiences. It was rare that I would communicate more with an adult child throughout the project. In only one case, the older adult was moving nonlocally, and the adult daughter lived nearby. After the older adult moved, contact shifted from the daughter to her. I view the older adults as the primary participants, as is explained further below:

¹¹ I followed thirty eight older adults over three phases of moving. Some were only available for pre-move interviews (n=25) and some were only available for post-move interviews (n=15). Older adults in this study ranged from ages 65-91 at the time of their moves.

1) Primary Participants: Older Adult's Perspective

To gain the older person's perspectives on moving, the primary participants were older adults planning to relocate. Most of the older adults relocated within the same county, so involvement with them in both their original residences and their new¹² residences was possible. Several persons in my study were part of group of older adults who moved to an independent living community (part of a CCRC) that was constructed during my research. I selected residents of this community because it offered a unique opportunity to follow a cohort of the original residents through the moving process. However, not all residents of this retirement community, fictitiously named Maryfield Village, participated in the study. Conversely, not all study participants in this project moved there, as some moved to other retirement communities, subsidized senior housing, homes or condominiums within the county and in different states across the U. S.

Since some primary participants were single (40) and some primary participants were a part of a couple (38 older adults or 19 couples), I acknowledge that different patterns of relationships may arise due to the dyadic nature of the latter. Research shows that married people often have smaller networks (Pachana et al., 2008). While the couples initially were interviewed together, permutations in interviews and interactions were based on participants' preference or availability.

¹² For clarity, I use "new" in contrast to "original" throughout this dissertation. However, the "post-move" residence was not always new, as some moved into condominiums and apartments with histories of other occupants. Interestingly, many study participants' "new" residences were recently built, and they were the original inhabitants.

2) The Kin's Perspective on Moving

Where possible, I recruited one or two members of the primary participants' kin network into the study in order to understand the move from their perspective. After building rapport during the first interview with the primary participant(s), I asked each primary participant to identify his/her kin who were most involved in the move. For couples, each spouse may have identified the same or different kin most involved in the move. I tried to contact kin identified by either or both spouses when possible. Many of the kin were participants' adult children, as adult children are more likely than other kin to provide assistance to older adults (Wolff and Kasper, 2006). I conducted interviews either in person or on the telephone with members of the kin network about the older person's move. Since the kin were defined by the primary participants as individuals who were most involved in their moving, the kin could be either biological or non-biologically related.

3) The Professional's Perspective on Moving

There were various professionals involved in the three phases of moving. In the pre-move planning phase, professionals included realtors, estate sale employees, and auction house owners, as well as persons who prepared the house for the move such as painters and handypersons. For the moving phases, moving company personnel were often hired. Post-move professionals included interior decorators, handypersons, and painters. When moving to communities planned for older adults, employees of the retirement communities, such as marketing directors, also became deeply involved in the decision-making processes of the older adults engaged in moving.

1.2.7 Sample Recruitment

This study used a purposive sample. Recruitment of older persons planning to move was accomplished through presentations at retirement communities, local agencies, housing fairs for older adults, and word of mouth. I circulated flyers and attended groups older adults frequented, such as senior church groups in the community. For those participants moving to Maryfield Village, I recruited participants utilizing snowball sampling through sustained interactions with the retirement community, such as attending monthly meetings and presenting my project at their meetings.

Primary participants were eligible if they were 1) age 65 and older and single, or 2) age 65 and older and members of a couple in which both partners met the age criteria, were planning to move, and agreed to be primary participants. I realized that some research participants might not progress through the stages of moving due to a host of factors including health constraints, inability to sell their homes, and the emotional challenges of carrying through with the move. If participants did not complete all three stages of the study, i.e. they did not move, their pre-move planning data were used to supplement those who completed all three stages. I also met and interviewed persons after their moves to understand more about post-move adjustment. These data were also used to supplement the data of those who completed the three phases.

1.2.8 Diversity Within the Sample

As this study's emphasis is on space and place, there are ways to conceptualize diversity for this project. First, the moving experiences of single older adults as opposed to couples planning and executing moves show great differences in how decisions are made and how labor and responsibilities are divided. Second, geography comes into play where both local and non-

local moves are followed. Third, the scope of moves ranged temporally, where some in the project had a certain “moving day” and others had a moving “phase” which might include moving first and then putting the original home on the market, or finding transitional housing when homes sold more quickly than expected. Fourth, the sample included a multitude of “original homes” where participants did not have just one original space from which to vacate but also had additional rental apartments, condominiums or homes. They might have summer homes in retirement communities, lake homes, or parents’ homes, all of which were factored into the move that involved them in this project. Some older persons had built their own homes or had made significant additions (e.g. one couple constructed seven additions), so the expertise and expectations that accompanied such endeavors translated to concerns about choice and personalization in remarkable ways. Lastly, in terms of square footage, some made significant changes such as one man’s transition from a large home with multiple additions and swimming complex situated on lake front property to 350 square feet. Others made more lateral moves, or even increased their square footage.

1.2.9 Sample Limitations

One limitation of the sample was that I was not able to document many quick moves. The original focus of study was moves to assisted living¹³ or skilled nursing facilities. In addition to following persons through three processes of moving, I also conducted interviews of older persons and adult children who were planning to move sometime in the future and also older persons and their adult children who had already engaged in a move. These supplemental interviews and observational experiences gave me further depth into my research questions. This

¹³ Assisted Living residences are long-term care facilities that also offer meals and other supportive assistance like helping with showers or administering medication. Skilled nursing facilities often offer a higher level of medical and nursing care than assisted living facilities, in addition to staff support to help older adults with a variety of Activities of Daily Living (ADLs).

was also an approach to counteract the “slowness” of the primary participants in their moving experiences.

I also tried to understand moves that occurred in a fast manner, since the primary participants did not move quickly. For example, I conducted a post-move interview with an adult child who moved her father to a retirement community the day her mother died. As the older couple had been living together, and her mother had been a primary caretaker for her father, the four adult children decided that it would be best to move their father that night. The adult children had been engaged in many nights of caring for their mother and they were tired of staying at the parents’ house. They were also concerned about their father’s confusion about where his wife had gone. They moved him that night to an Alzheimer’s care facility in town, where he lived for two months until his own death. After the initial interview with the daughter, I met with all four siblings on the day they went through their parents’ possessions at the condominium, which they plan to sell.

Another limitation of the sample is that most of the study participants were “resource rich,” able to either purchase condominiums or make sizeable down payments (\$100,000+) to retirement communities, and also able to pay monthly fees of \$500 to over \$2000, options unavailable older adults who are less financially well-off. However, along the way, with supplemental interviews, I spoke with a mover who moved from her car into subsidized senior housing and other movers in subsidized senior housing.

1.3 Data Collection

Three qualitative data collection strategies were used in the project. They were 1) semi-structured interviews, 2) participant observation, and 3) document review. Collecting data over time using all three strategies helped me develop an understanding of the *moving process in three stages* (Research Questions 1a and 1b). Interviews and observations involving the three types of individuals (older adults, kin, and professionals) helped me address research question 2a on how participants *talk about moves*, and participant observation with older adults and kin helped me understand question 2b on *whether kin networks have patterned ways of talking about moves* (See Appendices One through Three).

1) Semi-Structured Interviews: I used semi-structured interviews to address the aforementioned research questions. Interviews provide opportunities for the “co-creation of meaning” (Hesse-Biber and Leavy, 2006, p. 134), providing the interviewer and research participant the opportunity for the interviewee to be seen as the expert on moving, yet be prompted by the researcher to clarify, contrast other experiences, or go back to points that seemed particularly salient to the research questions at the time of the interview (Padgett, 2008, p. 111). My reactions to interviews (Padgett, 2008) were also documented in the fieldnotes (See participant observation section).

As this study primarily focused on the older persons’ experiences in the moving process, their well-being after moving, and the way older persons talk about moving, I interviewed each of the primary participants at each stage of the moving process: 1) pre-move planning (at least two months before move), 2) in-process moving (within two weeks after moving where possible), and 3) post-move adjustment (at least one month after move). For the initial conversation

covering pre-move planning, I conducted interviews on topics including the selection of the independent living community, the timing of the move and whether the move was self-initiated or initiated by others. I asked about the impact of the economic and real estate context on the move and about the advice and support sought for the move to understand who might be potential kin and professionals to involve in the research project. At times, the strategies of moving were affected by previous moves of parents or peers. Ekerdt et al. (2004) argues that moves themselves become part of family stories passed down through generations. Thus, in the pre-move interview, to better understand this move in the context of other moves, I inquired about other relatives' or peers' moves as well as conducted a short history of previous moves of the older adult (see Axinn and Pearce, 2005) during the interview (questions also included in Appendix One).

For the move in-process stage, I asked questions about who helped them with their move, and what they did with their possessions. I participated during the moving process described below. I tried to visit older adults either on a planned moving day, or shortly after a move. For example, I had coffee with one study participant the first morning in her new residence. However, as there were many moving permutations, discussed later in the dissertation, identifying a moving day was occasionally difficult.

Finally, for the post-move adjustment phase, I asked specific questions about how the move progressed, how they selected the residence they chose, what factors were important in moving, and who participated in the move. Issues of unexpected adjustments and concerns emerged from these interviews. Most of the interviews with older adults were conducted in the original homes of the older adults until they moved (see below for observational data collected by interviews in homes). Then interviews were conducted in their new residences.

Interviews with kin and professionals provided data on the move from their perspectives. Interviews with kin throughout the moving stages helped me understand their role in the move. Interviews with professionals addressed their roles in working with older adults as they make these moves. Since professionals were participating in many older persons' moves, I view their expertise as important to understanding how to better support older adults in the moving process. Expert interviews provided a wider perspective (Padgett, 2008) than individual movers and their kin on moving processes and conversations.

2) Participant Observation: As I developed relationships with older adults and their support network, I actively participated in the moving process. A key to anthropological research is participant-observation where the researcher can better understand the process (Geertz, 1973) by both observing contexts and participating in the process. Scholars have argued that this method is an oxymoron, requiring both “emotional involvement” in participation in activities and “objective detachment” to witness surroundings and activities (Denzin and Lincoln, 2006, p. 80). I argue that this method enhances the interview method for this study on moving, as much of the discussion in interviews is about physical space, objects and activities involved in moving. The researcher's participation in the process, including packing objects, working at garage sales, and walking through the homes and lawns, enables a perspective enriched by such engagement.

For the pre-move stage, I used participant observation methods along with a pre-move interview meeting. I used participant observation methods to gather data on the degree of space reduction (square footage and layout) between the original residence and the new residence in the retirement community, and the magnitude and types of possessions (ex: special collections of maps) that they planned for in the move. During the interview, older adults took me on tours of their homes and yards and identified furniture and collections they had to sell or wished to take

to their new residences. In this pre-move stage, I also participated in meetings with family and professionals to discuss the move, attended Charter member meetings,¹⁴ and attended marketing events for the Senior Independent Community. For the in-process move stage, I participated in packing boxes, helped with garage sales and estate sales, and accompanied the primary participants to the construction sites as they selected features for their new units. For the post-move adjustment phase, I made follow-up visits to the new residences of primary participants, visited with them in the Clubhouse, and spent time at events and activities hosted by the Community.

Participant observation was also particularly important to gather data to answer my research question on how people talk about moving. I observed conversations between 1) older persons and their kin and 2) older persons and professionals throughout the project. For example, I recorded conversations while I was conducting my observations, such as discussions while unloading a storage unit or at a garage sale about one's possessions, talks between older adults and their adult children about a move, or conversations between a husband and wife about a move they were planning together. When it was not possible to tape-record, I noted conversational patterns and practices in fieldnotes.

These fieldnotes serve as records of my observations and as a way to reflect on my observations analytically. The fieldnotes include information about the *setting*, including sensory observations, *activities*, and *participants present*, as well as analytical reflections including *new questions* or themes, *relevance* of observations to previous observations or themes, and reflections on the *researcher's role* (Hesse-Biber and Leavy, 2006). During my participant

¹⁴ Charter member meetings were the meetings of the future residents of independent living community fictitiously named Maryfield Village.

observation, I also photographed rooms in the primary participants' old and new homes to document the arrangement of their possessions to supplement my fieldnotes in addressing question 1 on the process of disbanding one's home and recreating a new one.

3) Document Review: Unlike interviews or observation, documents are not affected by the presence or "reactivity" of the researcher (Padgett, 2008, p.123). The documents produced by others are merely collected by the researcher. Linguistic anthropologists commonly compare conversational practices and written texts (Fenigsen, 1999) in order to understand how ideas are conveyed to mass audiences. During my fieldwork, I collected the following textual materials: For the pre-move stage, I collected materials from professionals about moving, such as marketing materials from the senior living community, or guides on making the moving process smoother. For the in-process move stage, I gathered materials such as lists of possessions, sketches or blueprints of the new residential space, and lists of steps of moving to understand how the primary participants think about situating their possessions in their new homes. Lastly, for the post-move adjustment stage, I collected materials relating to adjusting to living in a senior community, such as the newsletters published by the retirement communities after residents move in, to understand the issues or concerns of new residents.

1.3.1 Establishing Validity of Data

Both participant observation and document review serve as methods of "crystallization" (see Richardson, 1994 in Denzin and Lincoln, 2006) to establish validity of the interview data as a way to diminish chances for both respondent bias in interview format, or reactivity of researcher in asking or probing only certain questions (Padgett, 2008; Denzin and Lincoln, 2006). In order to establish validity, multiple data collection methods as well as "prolonged examination"

(data collected from January 2009-May 2012) helped me establish the trustworthiness of the data collected (Padgett, 2008). As an anthropologist, I found in-depth research involvement with older persons and their families crucial to the illumination of cultural practices of moving (see also Marcoux, 2000).

1.3.2 Analytical Approaches

To analyze the data for the project, I identified interviews to selectively transcribe. The selections were based on rated quality and content. I also analyzed my data, transcripts, fieldnotes, documents and photographs taken of spaces and experiences I participated in for emergent themes. I also analyzed transcripts for patterns of communication within kin networks and also, ways of speaking about moving.

1.4 Conclusion and Roadmap

In this chapter, I have presented the theoretical argument that older adults frame moving in terms of gift giving practices and offered an overview of the project. Throughout the dissertation, I will draw out the argument that one, gifts are more than just objects, and two, relationships are created and sustained through the process of moving, creating links between older adults, their kin, professionals, and the process of moving. While often discussions of accessibility, mobility and activities of daily living frame relocation studies, this dissertation offers the emotional motivation of gift giving as a rationale for moving.

Mr. and Mrs. Lewis, introduced in the opening of this chapter, chose to move in hopes of residing in a place where they will be linked to their kin on a regular basis. They hope to contribute to their children and grandchildren and hope for the “quid pro quo” in terms of

caregiving by their kin if circumstances arise. They view their move as a gift. This gift, like all gifts according to Mauss, is strategic and endures over time. For Mr. and Mrs. Lewis, this “quid pro quo” framework may take years to come to fruition.

The couple also moved as a way to optimize their lives by selecting a living environment where they are less worried about their future. I will expand on the ways lives are optimized throughout the dissertation. However, gifts are not “free.” Selecting this living environment near their adult son and his family meant selecting against living near relatives their own age, e.g. Mrs. Lewis’ brother. Gifts impose obligations, and so the presence of Mr. and Mrs. Lewis in a new town recreates the patterns of visitation, caregiving and expectation between all members of their kin network.

The remaining chapters will add layers of ethnographic data with theoretical and historical backdrops to support the argument of moving as a gift, as described in the following chapter outline:

Chapter Two

Voluntary Moves as Strategy: Decisions About Functioning

In cases where moves are voluntary, older adults may choose to move as a strategy to optimize their living experiences. In this chapter, the Baltes and Baltes (1990) model of Selection, Optimization with Compensation is described as a lens to understand selecting living in a less demanding environment by older adults who are acknowledging the impact of aging on their bodies. Baltes and Baltes’ framework supports an understanding of agentive roles in older

adulthood, where older adults *select* certain domains to concentrate on and master in order to *optimize* their lives. Professionals or assistive devices may *compensate* for challenges to support this optimization process. After describing the model's application to living in a less demanding environment, and its potential application for networks, as well as individuals, the second part of the chapter examines how assessing personal factors such as aging bodies, changes in social networks and health trajectories prompt some older adults to select living in a less demanding environment in order to achieve their goal of maintaining independence. This chapter also discusses the intersection of gift-giving and the SOC model.

Chapter Three

Contexts and Reactions

Moving from the personal factors influencing moving in chapter two, chapter three foregrounds two sociohistorical contexts that affect the moving process. In addition to historical developments of the long-term care system described in the chapter's appendix, the global context of financial uncertainty and the local context of available housing for older adults in their community are described. Older adults in this study often made their relocation decisions based on these two contexts. The chapter proceeds to describe how older adults react to these contexts, featuring study participants in control of their moves. Some react to housing availability with waiting stances, developing their criteria to embark on a move. Others react to housing market pressures by engaging in interim moves and building relationships with potential buyers. This chapter applies the SOC model as it examines how selecting living in a less demanding environment is set against economic and social contexts.

Chapter Four

Moving as a Gift

The chapter argues that older adults frame their moves in emotional terms of gift giving. Moving is conceptualized as a gift in three ways: to oneself, one's partner and one's kin. The chapter provides evidence of how these gifts play out, to set the stage for the subsequent chapters which address barriers to completing the gift of moving and complications arising from considering moving as a gift. There are detailed ways that gifts are seen as benefiting the older adult who is moving, as well as advantaging partners who also move. Kin who were not moving themselves were also recipients of the gift of moving. These gifts enchain others in relationships of reciprocity. However these gifts, like all gifts, are not without costs or danger. This chapter discusses some of the challenges that emerge along with gift-giving. This chapter also applies the SOC model, acknowledging that living in a less demanding environments may enrich one's emotional or physical reserves (optimization) , and yet deplete financial ones.

Chapter Five

Moving as an Imagined Future

In this chapter, I examine how extensions of temporality intertwine with commodification processes in considering a move as a gift. Often homes are one of the largest commodities that Americans buy and sell. I argue that without the emotional and physical work of older adults and their network examining moving in terms of the selection of commoditized goods, namely housing, the gift of moving cannot be completed. This chapter shows how senior housing units

operate and “circulate,” in Appadurai’s terms, in a world of commodities, and yet are fixed and modifiable physical entities, ethnographically situated in a contracted housing market. Through creative appropriations of their housing, residences are personalized because of preference, a gift to oneself which may enrich one’s emotional reserves, or to promote functionality in terms of disease progression and allergies. Applying the SOC model, I show how in some cases, personalization is an essential means to optimization by enriching one’s physical reserves in addition to enhancing one’s emotional reserves.

Chapter Six

Complications and Anxieties

Framed in terms of anxieties, this chapter outlines the complications that occur that prevent the completion a move as a gift to older adults or their significant others. Additionally, this chapter explores ways alternative gifts can be made if relocation is not possible. The chapter addresses the challenges of dismantling a home, with memories, motives of social distinction, and consumer logics underlying the process. For older adults, anxieties such as concern about mobility and undiagnosed diseases may emerge alongside concerns about uncertain futures in terms of navigating and maintaining homes. Applying the SOC model, these complications and anxieties show that selecting living in a less demanding environment is not without stress and worry. It also shows that sometimes, this selection can not be accomplished.

Chapter Seven

Unanticipated Adjustments

This chapter identifies adjustments that older adults make after completing their moves. The chapter explores post-move adjustment experiences of older adults, including living in age-graded communities and uncertain obligations to peers, examinations of expectations in senior living spaces and transition from home-owner to renter. Additionally, transformations of kin relationships post-move are also addressed. This chapter brings up the complexity of making and receiving gifts, creating extended temporalities, with respect to both the unanticipated adjustments and the obligations others may experience as a result of the gift. Applying the SOC model, these adjustments may serve to optimize one's life in some respects by enriching one's emotional and physical reserves, but they may also challenge the older adult and their kin with other demands and frustrations.

Chapter Eight

Conclusion

The theme of moving as a gift in a multitude of ways is emphasized in this chapter. The dissertation concludes by highlighting the limitations of the research including the sample of movers and pace and voluntary nature of the moves. The chapter also highlights the significance of the project, including applying the SOC model to a family network and examining a processual gift rather than object transfers. These make contributions to anthropology in terms of understanding gift-giving and social relationships. The chapter ends by providing suggestions

for future research and implications for social work practice and policies addressing the needs of older adults undertaking housing transitions.

Chapter Two

Voluntary Moves as Strategy: Decisions About Functioning

2.1 Introduction

This chapter addresses the voluntary nature of the moving processes. Unlike moves where adult children or professionals are directing relocations, in this study, the participants directed their own moves. This chapter analyzes several ways in which the agency of the older person unfolds in moving. First of all, older persons “in charge” of their moves were able to assess the landscape of housing options to decide the timing of their moves. While personal factors may have prompted the contemplation of relocation, the older adults chose to move at times that were appropriate for them. Another way older adults took charge of their own moves was through assessing the abilities of their own bodies rather than having someone else tell them that they cannot maintain their homes or prepare their own food.

In Cicero’s essay, “De Senectute,” he argues that old age is a time when the mind is not distracted by the body (cited in Baltes and Bates, 1990). From a theoretical perspective, the Baltes’ (1990) Selection, Optimization with Compensation (SOC) model builds on this idea by suggesting that aging

provides opportunity for growth. In fact, Baltes and Baltes enhance Cicero's argument by considering the aging body as "part of the story" (1990, p. 3) suggesting that older adults make changes in their lives as they acknowledge their physical and cognitive changes. The Baltes and Baltes (1990) SOC model also applies well to the voluntary nature of the moving process because the theory suggests goals are chosen by the older adults in order to optimize their lives (Baltes and Mayer, 1999). The SOC model emphasizes the agency of older adults who can "participate in the creation of aging" (1990, p. 4) by making choices about where to put their energy.

2.2 Strategic Decision-Making: Selection, Optimization with Compensation

Older adults may move to environments requiring less maintenance and worry, such as smaller houses, condominiums or retirement communities, for a host of reasons. Older adults often proactively choose to move into Continuing Care Retirement Communities (CCRCs)¹⁵ before an acute health event or the death of a spouse occurs (Sherwood et al., 1997). Moving before challenging events take place can be viewed in terms of strategic functioning. Based on data from the Berlin Aging Study (Baltes and Mayer, 1999), the SOC model proposes that older people often make strategic decisions about their lifestyles that they hope will result in more optimal functioning. Baltes and Baltes argue that in order to promote functioning, older persons select activities to concentrate on, which includes selecting against continuing other lifestyle activities (1990). These selections may result in optimized functioning for the older person that enriches his or her "general reserves" (Baltes and Baltes, 1990, p. 22). Often, this paring down of activities may be compensatory or adaptive, exhibiting behaviors that support the continuance of

¹⁵ For more information about CCRCs, see Appendix Five on the long-term care options available in the United States in recent years.

participation in the activities they have selected. Next, I will briefly describe each component of the SOC theory.

Selection

As people age, they will “select,” or determine, different domains to pursue to achieve their goals. Selection is critical to behavioral and developmental processes (Marsiske, 1995). Without selection of certain domains or activities, an individual would not know where to direct his or her energy or resources. These may be individually and socially established aims (Marsiske, 1995).

Aging itself affects the way the SOC model is applied to one’s life. Some scholars argue that with the onset of later adulthood, individuals aim to maintain their current functioning or independent lifestyle. Or they may aim to prevent cognitive and physical losses rather than focus on achievement goals (Marsiske, 1995). Goals have also been conceptualized by some scholars in terms of “approach” or “avoidance” goals (Marsiske, 1995). In other words, “approach” goals orient a person toward attainment, something like learning a new hobby or developing better friendships. On the other hand, “avoidance goals” can be considered similar to prevention of losses, like maintaining mobility or health status. In addition, framing a goal as a potential loss rather than a potential gain affects the risks one is willing to take. Marsiske (1995) argues that people are willing to take more risks to counteract a loss.

Since the SOC model is framed as dynamic and includes ongoing assessment of one’s choices, it should be considered within a “matrix of alternatives” (Marsiske, 1995, p. 41). When a previous choice no longer provides the intended benefit, or the cost of a choice becomes greater than when first selected, new domains may be chosen. Importantly, Baltes and Freund suggest that “empirical studies need to address whether some goals might be subjectively so central for a person’s sense of leading a meaningful life that giving them up would lead to even stronger feelings of loss than continuing to engage in (fruitless) compensatory efforts” (2000, p. 52).

Optimization

The second component of the model, optimization, addresses the path toward achieving a goal. In this path, there is a “pre-actional” phase where plans are made. To enact these plans, time and energy is required to enrich or at the very least, prevent depletion of one’s reserves. Marsiske argues that if one does not possess the skills to achieve the chosen goals, then a primary task may be to acquire and/or practice those skills (1995). Sometimes, learning from others, either one’s older relatives or friends who have successfully coped with some age-related challenges, may lead one to follow their examples. In other words, persons learn by “modeling successful others” (Freund and Baltes, 2000, p. 46). Scholars also argue that having high self-efficacy beliefs affects this process (Freund and Baltes, 2000). Even if goals are chosen by an individual, their perception of how much they can control outcomes affects the optimization process.

Compensation

The third component of the SOC model, compensation, is often conceptualized as being integrated with optimization. Some scholars distinguish between optimization and compensation in terms of growth or decline. Freund and Baltes argue, “whereas optimization is motivated by consideration of processes related to growth, compensation addresses the aspect of losses and decline” (2000, p. 49). However, this dichotomy is not always useful. The literature also indicates that the same actions can be considered either compensation or optimization. For example, Freund and Baltes (2000) give the example of practicing phonetic articulation. A child practicing phonetic articulation may be optimizing the goal of developing language skills, whereas these same actions undertaken by an older adult may be compensating for neurological challenges to counteract loss from a stroke (Freund and Baltes, 2000, p. 50).

Though compensation was originally thought to be related to decline, compensatory approaches should be considered the means to optimize one’s goals. In the original Baltes and Baltes (1990) article,

they provided the example of the pianist Rubenstein. Rubenstein compensated for his declining agility by limiting his repertoire to optimize his performances.

Compensation, used to optimize one's selected domains, may sometimes come in the form of external supports such as external aids (hearing aid, walker). If one wants to maintain independence, one may use compensatory social supports like hiring a home health aide to assist in grocery shopping to optimize one's living situation. Or one may seek out counselors to help families improve communication, which may be considered a compensatory approach to optimizing one's relationships.

2.3 Application of SOC Model to Project

This project uses the SOC model to understand the relocation of older adults. Relocation involves a host of activities with the ultimate goal of maintaining one's independence by living in a less demanding environment¹⁶. In Baltes and Baltes' (1990) original paper, the authors offer three concrete examples of the model. One example, mentioned above, is Rubenstein's strategy of reducing the number of pieces he plays (selection), practicing the pieces more often (optimization), and playing the pieces with reduced speed (compensation) while maintaining the contrast between slow and fast sections of the music. A second example features an older adult who selects the hobby of running by giving up other activities (selection), learning more about diet and optimal times of day to run (optimization), and learning how to treat injuries and choose supportive shoes (compensation). Another example is the selection of living in nursing homes, a "less demanding physical and social ecology" (p. 24), where increased social contact expands older adults' social reserves (optimization) and systems of technological and medical help are available where needed (compensation).

¹⁶ Throughout this dissertation I adapt Baltes and Baltes' phrase, "a less demanding physical and social ecology" (1990, p. 24) to my own wording, "living in a less demanding environment."

2.3.1 SOC Application: Living in a Less Demanding Environment

The application of the SOC model to nursing homes can be easily applied in different ways to various present-day levels of long-term care, not yet envisioned at the time of the original paper. Today, older adults can choose a less demanding environment to live in (selection), which may lead to optimizing their lives in different ways discussed below. Optimization, according to Baltes and Baltes, “reflects the view that people engage in behaviors to enrich and augment their general reserves” (1990, p. 22). I suggest that by selecting an environmental domain that they can master, they can enhance their reserves in multiple ways. They may also bring in compensations to sustain living in the new environment.

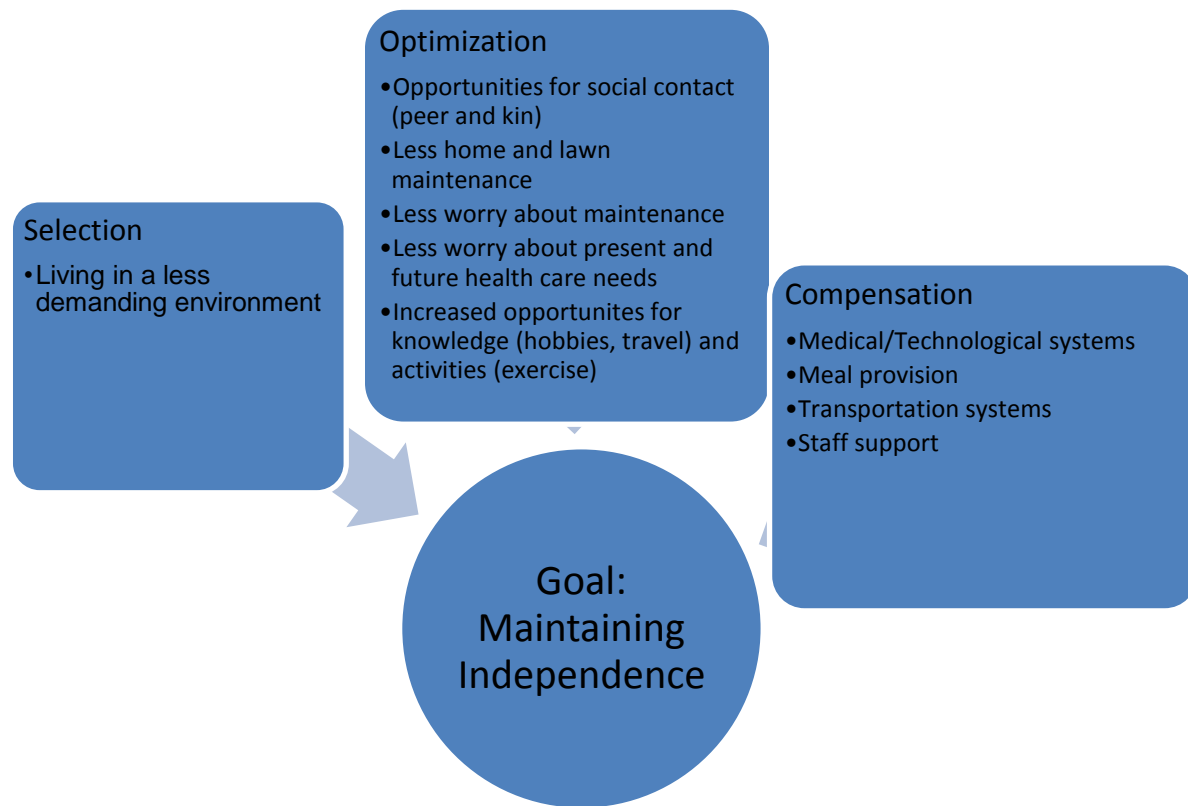
In selecting living in a less demanding environment, an older adult may move to a one-level housing unit where carrying laundry up and down stairs is not a concern. This move also avoids the potential risks of falls and fractures, which entail decreased mobility and a long recovery process. As previously stated, Marsiske (1995) argues that people are willing to take more risks to counteract a loss. In the case of moving, other associated risks may be leaving one’s home in a neighborhood with long-established ties. While some older adults move locally or to locations near their original homes, some take risks of disrupting their existing social support networks by moving across the state or country to live near kin.

There are different ways older adults’ lives are optimized living in a “less demanding” environment. Baltes and Baltes argue that in residential cohabitation of older adults, there is also opportunity for optimization by enriching their emotional reserves because there is opportunity for social contact with peers. There might also be opportunities for social contact with kin, if older adults move near their kin, which scholars have found is a common moving practice of older adults (Litwak and Longino, 1987). Additional optimization possibilities include less need to use their physical and emotional reserves. If they spend less physical energy on home and lawn maintenance, they will have fewer emotional worries about chores to be done in the living environment. They will also have the opportunity to pursue

knowledge and exercise, as they may have more time available due to decreased time requirements of home maintenance. Also, there may be less worry about their possessions, as often divestiture has occurred during the move. Lastly, there is less worry about their future health care needs.

Medical and technological supports may also be available when older adults move to CCRCs, as many in this study did, and as mentioned in the original Baltes and Baltes' (1990) example of compensations available in nursing homes. With the advent of an array of long-term care options, other compensations may also be available if needed, including meals, staff support, and transportation. Today, meals can often be provided either in large dining halls or through deliveries to individual units. Staff support may cover many things such as opportunities for social outings facilitated by staff members or emotional support in transitioning to the pace and culture of a new community. Transportation offered in older adults' residential communities can compensate when older adults have stopped driving or have come to rely on family members for transportation. Transportation as a compensation may also facilitate increased social interactions (optimization) as some older adults may welcome outings with peers to cultural events and shopping experiences. In addition, transportation provided to medical appointments can also facilitate less worry about health care needs (optimization) without having to drive or rely on kin.

Figure 2.1 SOC Model: Selecting Living in a Less Demanding Environment



Goals may be chosen either proactively chosen or in response to losses (Freund and Baltes, 2002). In the case of selecting a less demanding living environment to achieve a goal of maintaining one's independences, some older adults project possible physical and health limitations for themselves or their spouses even though they are well at the time of selection. Others will select living in a less demanding environment to achieve the goal of maintaining one's independence as a reaction to the loss of a spouse, or to decreased physical functioning.

2.4 Applications of the SOC Model to a Network

The SOC model shows the ways older persons select domains to achieve goals and the ways reserves can be enriched (optimization) through this selection. Lastly, the SOC model suggests that the selection may be achieved through compensations. This project aimed to apply to SOC model to a network because in living in a less demanding environment, kin were often embedded in the process.

In terms of the SOC model, the goal of independence by selecting living in a less demanding environment often involved kin. While living in a less demanding environment may mean more time for social contact with peers and kin, it may also complicate family members' lives that may need to alter their schedules to accommodate the increased contact. For example, kin may hang pictures for older adults in the new environment, help shop for groceries and help with transportation to doctor visits. Given the network design of the project and the network approach of the SOC model, I argue that the application of the SOC model (living in a less demanding environment) can also be understood in terms of the anthropological literature on gift giving.

2.5 Intersections of Gift-giving and the SOC Model

There are several ways that gift-giving practices intersect with the SOC model. First, both gift-giving and the SOC model are theories of strategy. In gift-giving, gifts and recipients are purposefully chosen by the giver. Strategically involving specific recipients in gift-giving imposes obligations for reciprocity at a later date. Gifts are never completed in a single gift as Mauss (1925/1990) suggests, as there are three obligations involved in gift-giving: to give, to receive and to reciprocate. The latter extends the gift because "a gift is received with a burden attached" (p. 41). When living in close proximity to kin, older adults may rely on them for assistance in ways that they use to rely on neighbors in the past. Burdens of both time and scheduling effort may exist for the family members. Kin may also become involved in advocating for the older adults in terms of requesting services from retirement

communities or questioning billing policies. Whether kin view these obligations as burdensome may depend on their degree of involvement and on their own challenges.

Likewise, in the SOC model, older adults strategically select certain domains on which to concentrate as they adapt to the aging process. Carstensen (2006) argues that “goals, preferences and even cognitive processes, such as attention and memory, change systematically as time horizons shrink.”(p. 1913). Furthermore, the goals of older adults may be determined by their perceptions of time. As Carstensen’s Socioemotional Selectivity Theory suggests, people make different decisions based on their perception of time until their deaths: “as people age and increasingly perceive time as finite, they attach less importance to goals that expand their horizons and greater importance to goals from which they derive emotional meaning” (p. 1914). These goals include focusing on those in their social networks with whom they have close emotional ties (Carstensen 2006).

Focusing on one’s social network indicates a second way that gift-giving and the SOC model intersect. The two theoretical frameworks, as applied to this project, feature ways that kinship networks are built and sustained. Living in a less demanding environment becomes a gift to older adult as well as family members. These gifts can take many forms, as discussed in more detail later in this dissertation. However, the SOC model highlights potential challenges accompanying the gift. If older adults select living in a less demanding environment, they may experience optimization in terms of spending less time and worry on lawn and house maintenance. Reducing the emotional and physical energy expended on such tasks may lead them to have expectations for interactions with kin. Applying the SOC model to a kin network shows that kin are implicated in supporting the ways in which the reserves of older adults are enriched. The increased social contact, which may enrich the older adult, may also enrich the lives of their family members. For example, with the older adult living in a less demanding environment, kin may have more time for other activities (optimization) if kin had duties like mowing the lawn and fixing plumbing when their older adult was living in their original residence. However, kin may take on new

duties, including social ones such as having the older adult over for weekly dinners. There may be limitations on the family member's independence, e.g. freedom to take a vacation or to relocate, due to these social expectations.

2.6 Aging Bodies: Strategic Alterations

The SOC Model incorporates adaption to an aging body. I participated in several conversations where older adults often mentioned the slowing down of their bodies. For those who had moved many times, they talked about feeling tired when taking on the concerns of the move at hand. For example, Mr. and Mrs. Lewis were used to many moves, being a career military family. They had also previously custom built two homes, so for their final move they took on the challenge of building a dream home near one of their sons and his family. They planned to do much of the work themselves in order to reduce costs.

- 1 Mrs. Lewis: We can't do as much as we did before.
- 2 Tam: Yeah
- 3 Mrs. Lewis: We try but we can't, we just can't, we
- 4 Tam: Yeah
- 5 Mrs. Lewis: don't work as fast. And you know how sometimes when you're working
- 6 hard, you physically hit a wall and can't go any further.
- 7 Tam: Yeah
- 8 Mrs. Lewis: We're doing that a little sooner (laughter)
- 9 Tam: Right, right.
- 10 Mrs. Lewis: Yeah, and I tend to want to keep going until the project is done.
- 11 Tam: Yeah
- 12 Mrs. Lewis: Or ya know, let me finish

- 13 Sarah: You guys worked pretty hard . I was going to say, when you guys were doing
14 all the staining. I was like, man I don't have that much energy, I would have
15 felt...
- 16 Tam: Yeah
- 17 Mrs. Lewis: We got very tired. We got very tired
- 18 Tam: Yeah
- 19 Mrs. Lewis: But um, I guess we always have worked hard.

Above, Mrs. Lewis mentions the energy required and the tiredness felt during the process of moving. Others in the project also talked about how physically exhausting the moving process was, and said that they could only work for a limited time before needing breaks. Yet most were motivated to continue diligently at the work of moving. However, this should not be understood just in terms of chronological age. The age of persons moving and their energy levels varied in my study.¹⁷ For example, the oldest mover in the study, Mrs. Ash, age 90 at the time of her move, expended great energy, even telling me of waking in the middle of the night, and continuing to work, sorting out her papers and making lists. An avid swimmer, she also discontinued exercising to focus on her move. After she had moved to her apartment in the retirement community, as we were walking around the hallways of the community and had stopped in front of the indoor pool, she looked longingly at the schedule of aqua aerobics classes but told me that she would not allow herself to join the activities until she settled her paperwork. Her chronological age did not map onto her energy level or ability to orchestrate her move, including activating community resources and liaising with many professionals about her possessions.

Here I draw on Caroline Bledsoe's "two visions of time and the body." In her book, "Contingent Lives, Contingent Bodies," Bledsoe suggests that a Western ascription of time is "[equates] the process of ageing with age," where every month and year is seen as "a linear grid of equivalent chronological

¹⁷ It was also remarkable that chronological age did not necessarily correspond with the number of professionals or family members involved in the moving process.

segments” (2002, p. 16). With this framework, we can assess phases of older adulthood commonly presented in the literature. However, she suggests another lens for considering age, i.e. in terms of contingency. Her use of contingency is multivalent, to account for the various experiences in one’s lifetime that age or cause a person to become ‘worn out,’ including fortunate partnerships, traumas experienced, and proximity to emotional danger. Additionally, she argues that agency is intertwined with aging, suggesting that persons control the speed and texture of their own aging (p. 24). Finally, Bledsoe argues that these processes cumulatively contribute to the aging experiences of an individual. Mr. and Mrs. Ash offer an illustration of this dynamic.

- 1 Tam: I thought so. Umm, should you have moved 3 years ago, or should you
2 have moved 3 years from now? Or is this like the best time?
- 3 Mrs. Ash: Oooh, I think 3 years ago would have been, 5 years ago would have
4 been better. The market would a been better. But you don’t think you’re
5 ever going to have a decrease in, ah, activity or stamina which comes
6 along and creeps up on you. And I would say that anyone, in retrospect,
7 I would say at 75.
- 8 Tam: Okay.
- 9 Mrs. Ash: you really should start thinking hard on what you’re going to do,
10 because one thing, if you move into a retirement community, such as
11 [retirement community] and they’ve got so many activities, you gotta
12 have enough energy to enjoy them.
- 13 Tam: Yeah.
- 14 Mrs. Ash: And at 90, how much are you gonna kick up your heels, as opposed to
15 75 when everything is going good... and ya know.
- 16 Tam: Um hum, um hum.
- 17 Mrs. Ash: and I think, but we can’t rewind the clock so
- 18 Tam: Yeah, but would you both agree with that?
- 19 Mr. Ash: Absolutely.
- 20 Tam: Like, you should have moved a few years ago?
- 21 Mrs. Ash: Yeah.

22 Mr. A: I think 75 would have been a good time.
23 Tam: Yeah.
24 Mrs. Ash: Yeah, but at 75, we said, oh, we're not ready to retire, we'll think of it in
25 5 years.
26 Tam: Yeah, yeah.
27 Mrs. Ash: That was what you said. And many times you said I'm not ever gonna
28 move outta this place.
29 Tam: Well yeah, and even getting from that logic. You know that way of
30 thinking, of no, this is my home, why would I even consider a different
31 home? I love this home.
32 Mrs. Ash: Yeah.
33 Mr. Ash: Right.
34 Tam: To, to ok, let's be real about the aging process and about the lawn care
35 and ya know, things like that.
36 Mrs. Ash: But at 75 you don't think of that because boy you're...
37 Tam: You're just enjoying your time probably...
38 Mrs. Ash: Yeah, yeah. And uh we were golfing a lot and uh, working in the yard
39 Mr. Ash: 10 years ago we were, that's true, but we haven't played golf for
40 years.
41 Mrs. Ash: 5 years, 5 years.
42 Mr. A: 5 years.
43 Tam: 'kay.
44 Mrs. Ash: I played 'til 80 and then my shoulder run out, but uh, um, well I think
45 that can happen to anybody earlier.
46 Tam: Right.
47 Mrs. Ash: But I think that 75 would be a really good time to... but there are a lot
48 of people that aren't even, wouldn't even consider it.

In this study, the participants exhibited agency and control, thus leading me to try to understand how these groups of people are so in control of their moves and feel so liberated at the thought of moving.

2.7 Understanding Relocations

Older adults experience many transitions in old age, including cognitive and physical changes. An older adult may develop symptoms warranting medical attention and later be diagnosed with a debilitating disease. Older adults may experience acute disruptions in their lives, e.g. stroke. There may also be changes that occur to one's social network, such as the death or decline of a spouse, relocation of friends and neighbors, or relocation of adult children and other kin.

Within these contexts of change, housing concerns often emerge. Older persons may reevaluate the benefits and drawbacks of remaining in their current housing. Older persons can be supported through visits by professionals, volunteers or family members. If they plan to stay in their current homes, complementary supports like home modification¹⁸ may help those older adults living alone or living with a spouse/partner to continue to age in place.

Rather than aging in place, relocation is another option for older adults who are concerned about their emotional well-being, physical health and safety¹⁹. Relocation is also an option that can be

¹⁸ Examples of modest home modification include installation of grab bars to prevent falls and ramps to promote accessibility. More complex home modification includes creating additions with barrier-free bathrooms and widened doorways (36 inches is required doorway entry to meet Americans with Disabilities Act (ADA) compliance). Costs associated with modifications vary greatly, and some communities offer subsidies and labor to assist with the modification.

¹⁹ This project emerged from clinical experience I had when I worked at an agency for older adults in Singapore. While working with older adults and their family members on housing choices, I had one client who was making a housing transition with no family in the country. He had arrived in Singapore in his early 20s. He approached the agency because he wanted a job as a security guard in exchange for being able to live at the agency. I helped him identify a residential home for older adults where he could relocate. The new space offered him a twin bed and a footlocker at the end of the bed. Together, we sorted through his two-bedroom apartment and I helped him decide what to bring along for the footlocker as well as liaised with the housing authorities to cancel his lease on the apartment he left.

supported or even strongly encouraged by kin as they express concern for the well-being of their older family members. In a seminal piece by Litwak and Longino (1987), the authors identify three types of moves that older adults make. The first is an “amenity” move, where older people relocate to embrace a different lifestyle, usually involving less maintenance of their housing unit, the possibility of participating in leisure activities (such as golf), or residing in an environment with warmer weather²⁰. The second type of move is considered an “assistance” move, where older people move towards family or other relatives who can provide support when needed. Lastly, Litwak and Longino identify “nursing home” moves, where older people move to facilities because family assistance cannot address all the needs of the older person.

Some transitions are not strictly viewed as “amenity,” “assistance,” or “nursing home” moves and can actually accommodate all of the types of moves mentioned above. Groger and Kinney (2006) suggest that moves to a CCRC serve as three moves in one, as they can offer improvements in amenities as well as increasing the proximity of friends and family. In their study of older persons moving to a new CCRC in a college town, their study participants often found peace of mind because they were moving to a place which could later provide health support while they still remained in the community they loved (Groger 2006). The authors identified an unexpected finding, which was that their participants held an anticipatory stance toward engagement with other residents and toward a new life. This study identifies

Through this clinical experience, I realized the need to understand 1) the decision-making processes involved in moving for older adults and 2) the contexts of moving for older adults. The decision-making processes include understanding what decisions are involved as well as who is engaged in the process. Secondly, the contexts of moving involve the emotional context of moving for older adults and their kin, the physical challenges of engaging in moving in older adulthood and the financial contexts in which older adults make their decisions about the homes.

²⁰ The early relocation literature followed “migration” of older adults, often tracking whether they left their current state of residence, often to go to the sunbelt states.

the anticipation of “to come” as part of the relocation process.²¹ ²²For many in this study, moving added an excitement about the next step in their lives.

Relocation can be either local, allowing older adults to remain in their own community while changing their residence, or non-local, where moving entails a new community in addition to a new residence. Non-local moves often involve selecting new physicians, finding new banks and grocery stores, and learning about trash delivery and farmer’s market schedules.

Yet, distance may be relative. Moves to another neighborhood within the same town may feel more, less, or equally drastic than moving across states or oceans. In “Predictors of non-local moves among older adults: a prospective study,” Longino et al. (2008) argue that those who had experience with non-local moves, such as having their children move away for education or work, or their own moves previously for work, were more likely to undertake non-local relocations in older adulthood. Length of time in their homes also factored into whether they moved or not, as those living in their homes for less time tended to move non-locally.²³ This study provides insight into who would move non-locally²⁴; those with strong community and personal ties are less inclined to move.

²¹ In fact, much of the gerontological literature views relocation in terms of reactions to losses and as experiences of loss. In a poster presentation at the Gerontological Society of America meetings (2011) entitled, “Towards a new beginning: *Moving as liberation for older adults*,” I’ve identified both intrapersonal and individual ways that moving can be liberating. Intrapersonally, older adults are excited about 1) new friendships and 2) new activities and individually, older adults experience relief and happiness after relocation. A reframing of a move as liberating rather than in terms of loss also has methodological implications in terms of research design.

²² Groger (2006) and I both had primary study sites where the “ominous” nursing home was not collocated on the site of the independent living community. Though peace of mind was present in terms of entry into the next level of care if and when needed, it was not visible. Several study participants told me they felt this made them feel good about moving.

²³ In the study, those who owned a second home were more likely to move non-locally. However, those with recreational vehicles tended to move less.

It is also important to consider why people stay in their own homes. Erickson et al. found that one reason for staying in one's home includes having an adult child in the area. Those who moved were "pulled" toward family and toward a residence with less maintenance, rather than "pushed" out of their homes because of the difficulty of maintaining them (Erickson et al., 2006; Krout et al., 2002). This pull toward family has been demonstrated repeatedly in the literature and can be thought of as the "joint impact of human and economic resources" (Longino et al., 1991, p. S223). Human resources include relatives who will come over with meals, help after medical operations, and mow the lawn. Economic resources can sometimes circumvent the need for family as professionals can be hired for many of these same tasks.²⁵

In the midst of housing decisions, scholars are trying to better understand the role of health status in moving. One recent study asserts that after relocating, older adults might experience higher comorbidity, disability, limitation and worse self-rated health within a year. However, these challenges were short-term and they later "stabilized" (Song-Lee and Chen 2009). Rather than relocation leading to declining health, as suggested in other studies such as Golant (1998), Song-Lee and Chen's work follows Litwak and Longino's conceptual model where declining health prompts relocation. The stabilizing factors of a move are evident in this study, because seniors, who brought up the physical and emotional strain of the move, also spoke of how relieved they were after the move took place. Their study supports other findings that suggest a greater satisfaction with friendships and social life for those moving to retirement communities.

²⁴ In terms of marital status, those widowed 6 months or less, moved more than married or single persons, those widowed a year or more did not move more than those with any other marital status. This may suggest that right after widowhood a move may be considered, but as time passes, the "pull" to stay in one's home strengthens.

²⁵ Scholars have shown varying comfort with using non-kin as support for these concerns (Miner, 1995).

In another study, those remaining in current housing said their quality of life was the same or worse after considering a move but not carrying through with it (Gardner et al., 2005). The study shows that movers felt more independent, because they were not as reliant on friends and family but the authors also cautioned that they might have reported such positive satisfaction to justify their move. Embedded in a relocation decision are the older person's reasons for moving, the destination selected, and the sense of control they feel over the moving process. In an earlier study, Gardner explored predictors of moving transitions. Gardner found that there was no difference in education, occupation or income level between those who planned life transitions and those who reacted to them. Thus "this suggests a personal response to lifespan transitions rather than structural influences" (1994 p. 38).²⁶ Therefore, a better understanding of the personal triggers, health and changes in their social networks are critical to understand when older adults contemplate relocation.

2.8 Moving Decisions: Strategic Reactions to Health Concerns

Moving requires an understanding of a present and future self in terms of health and mobility. For many individuals, current health needs and the possibilities of disease progression were major factors in the timing of their moves. In two cases, the Keiths and the Jacksons chose to move because the husbands had serious heart conditions and the upkeep on their previous houses was becoming more difficult. Both husbands were used to maintaining their homes meticulously and yet, due to their health challenges, would not be advised to continue exerting such effort towards home maintenance. Both wives anticipated future complications with their husbands' health. Mrs. Jackson told me that she could not

²⁶ It is important to note that moves don't always come from an individual's needs. Capezuti et al. document the experiences residents are relocated to a series of other facilities after the closing of a nursing home due to state violations and financial challenges. The authors identify three stages of relocation: anticipatory, immediate post-transfer, and settling in. The latter period did not demonstrate any serious physical or mental health changes, according to their data on 120 residents.

have made the move without her husband, so moving while his health allowed him to actively participate in the move was a good choice for them.

In this project, many participants moved to prepare themselves to be potentially ready for health concerns. In the case of Mrs. Lance, her husband had a stroke in their home. He agreed to move because if anything happened to her, he would be able to live in the retirement community alone. In this case, moving involved serious contemplation of a spouse's mortality and ways in which the husband would be taken care of, in case of the wife's passing. This process of moving due to anticipating a spouse's death relates to conceptualizing the move as a gift to a partner. However, in this case, knowing that the partner with a serious disability could be taken care of was as important as in other cases where the person without serious medical complications would be taken care of. In a recent phone conversation with Mrs. Lance (April 2012), she told me that after moving to the independent living retirement community twelve years after her husband's stroke, her husband had begun to talk much more. She also mentioned that he has many more interactions with her than in the original home and that he plays cards with other residents often. She also told me that she wished doctors would tell patients that "if [you] give encouragement and something gives them motivation, they can get better" (personal communication, 2012). Her husband's communication and happiness have noticeably improved since moving.

Mr. and Mrs. Johnson provided an example regarding disease progression. The couple primarily moved because Mrs. Johnson has Multiple Sclerosis. While they planned to be travelers and participate in international mission work in retirement, they have chosen new roles as communication liaisons to support overseas work because of her diagnosis. However, on moving day, I asked Mrs. Johnson whether this was the best year for the move. She said that while she would never walk quickly again, her husband had been plagued by back problems this year. Mr. Johnson had been working hard on fixing up their house, lining kitchen cabinets with new shelf paper and a detailed list of projects before he left (see Appendices Eight to Ten for the ways he inventoried objects in each room, the way he made a broad timeline of the move and way he noted weekly tasks). Mr. Johnson had an entire notebook for his move,

complete with sketches, lists, and telephone contacts. Moving this year, and having his children do most of the lifting of heavy items during the actual move, would actually help them both.

2.9 Application of Theoretical Frameworks

The examples presented in this chapter feature the complexity of the SOC model. In the case of Mr. and Mrs. Lewis, they selected living in a less demanding environment to maintain their independence by moving near their kin to enrich their social contact with their son and his family. In order to achieve their goal of maintaining their independence, they moved across the country and built a new home. They highlighted the physical labor required to construct their new home. While their new housing may be less worrisome in some regards, such as increased accessibility within the house and increased kinship contact, there may also be increased worries about money in the future.

Second, Mrs. Ash worked diligently sorting her papers and divesting herself of her possessions to achieve her goal of maintaining her independence by living in a less demanding environment in a retirement community near her daughter. After decades living separately from her kin, she hopes to enrich her social reserves through increased interactions with them.

Several people moved as a reaction to physical ailments of one of the partners (heart disease, heart attack or Multiple Sclerosis). Conversely, Mr. and Mrs. Lance moved because Mr. Lance had had a stroke, and as Mrs. Lance was older than him, they wanted to insure that he would be taken care of if anything happened to her. In all of the health-related examples older adults selected living in a less demanding environment in order to achieve their goal of maintaining their independence. Often, this is selected for health reasons driven by loss, as these older adults had experienced loss of mental or physical abilities. By selecting living in a less demanding environment, they aim to achieve their goal of maintaining their independence.

2.10 Conclusion

The Baltes and Baltes model provides a useful lens for understanding how lives are optimized and what types of compensations support these optimizations. The lives involved may be those of older people as well as kin in their social networks. However, these choices and strategies, understood through both the SOC model and theories of gift-giving, are made in contexts often uncontrollable by individuals. The voluntary nature of moving for the participants in this study has been highlighted in this chapter. Rather than having others drive their moves, these older adults retained and asserted their agency. Older adults strategized to optimize their lives. In light of their aging bodies, changes and health concerns, older adults in this study chose to move. In the next chapter, I describe the contexts in which this research project was conducted. As they retained agency in different ways, I then show how older persons reacted within their contextual frames.

Chapter Three

Contexts and Reactions

3.1 Introduction

This chapter provides a backdrop for the research project in two ways. First, it highlights the sociohistorical contexts²⁷ in which the study occurred. While older adults strategized to optimize their lives as described in chapter two, the external climate forced different options at different points in time. Globally, the world was reacting to uncertain financial times. Locally, the availability of senior housing created a field of options.

Second, this chapter describes reactions to both financial and housing contexts. Older adults reacted in many ways, such as awaiting housing options that would be available in the future, a reaction that made moving a projection of a future time, and in the ways they planned their moves to react to financial contexts and current housing availability. Lastly, in selling homes, inevitably relationships with buyers were fostered in order to assure the sale of a home in difficult financial times. At the end of this chapter, I apply the SOC model given these financial and social contexts.

²⁷ For a brief history of long-term care in the U.S., see Appendix Four.

3.2 Study Contexts

There were two important external contexts that impacted housing transitions during the time of the study. Most explicitly mentioned by study participants were the financial implications of the Global Financial Crisis, or as some scholars call it, The Great Recession. The Great Recession impacted groups of people who had not originally been considered vulnerable (Allard, 2010). Another important context for this study was the availability of housing for seniors in the study site.

3.2.1 Impact of the Global Financial Crisis on Study Participants

“Who else inside the black box of modern finance had grasped the flaws of its machinery? It was then late 2008. By then there was a long and growing list of pundits who claimed they predicted the catastrophe, but a far shorter list of people who actually did. Of those, even fewer had the nerve to bet on their vision. It’s not easy to stand apart from mass hysteria---to believe that most of what’s in the financial news is wrong, to believe that most important financial people are either lying or deluded—without being insane.”

---Michael Lewis, *The Big Short*, xviii, from text entitled *Poltergeist*

This project began in the aftermath of the Great Recession.²⁸ As I began tracking the moving experiences of older adults in early 2009, the change in total wealth worth for persons age 65-74 decreased 13.9% and for those age 75 and above it decreased by 20.4% (Bosworth, 2012, p. 19). Every generation experienced these financial challenges differently; older adults

²⁸ Alternatively termed the Global Financial Crisis.

were impacted by the stock market, but less by unemployment or employee compensation changes (Deaton, 2012, p. 2).

Their residential mobility seemed uncertain as financial stability came to be questioned. The Financial Crisis Inquiry Commission (2011) writes, “the profound events of 2007 and 2008 were neither bumps in the road nor an accentuated dip in the financial and business cycles we have come to expect in a free market economic system. This was a fundamental disruption—a financial upheaval, if you will—that wreaked havoc in communities and neighborhoods across this country” (p. xv). The implications of physical manifestations of worry and stress have linked the Great Recession to experiences of pain and ill-health.²⁹

Regionally, median percent changes in wealth in the Midwest, for all ages, decreased by 17.5 % (p. 19). Scholars have suggested that the state of Michigan experienced the recession earlier and more deeply than many other parts of the country. “If the national economy is standing at the precipice of a financial crisis, then the Michigan economy has already taken a step off the cliff. The state of Michigan is experiencing economic distress more intensely and at a quicker pace than the rest of the country” (Manning, p. 16). Unemployment³⁰ and diminished personal income³¹ were measures that reflected the difficult times of the state specifically. This backdrop for this study impacted older adults and their kin in many ways.

²⁹ In “The financial Crisis and the Well-Being of Americans, Deaton writes, “Hedonic experience, particularly worry and stress, but also physical pain, deteriorated during the crisis, becoming rapidly worse during the summer and fall of 2008, recovering briefly during the year-end holidays, only to reach their worst values around the time that the stock market was at its lowest” (2011, p. 32).

³⁰ In Dec. 2009, Michigan had an unemployment rate of 14.5 percent (Cook, 2010).

³¹ In 2001, median personal income exceeded the national average by 8 percent but by 2009, lagged by 8% (Cook, 2010).

While scholars continue to debate the origins and repercussions of the Global Financial Crisis, September 2008 and October 2009 saw turmoil and uncertainty in the banking sectors of the U.S. and around the globe. Eleven trillion dollars of household wealth was lost, “with retirement accounts and life savings swept away” (Financial Crisis Inquiry Commission, 2011, p. xv). Some attribute it to overconfidence in the housing industry that permitted loans and financing of both new construction projects and mortgages for persons who should not have been given loans. Others attribute a great deal to oversight deficiencies that permitted the bundling and repackaging of loans.

What was clear as I started my study was the impact of the financial crisis on older adults who were planning to move. It is essential to understand that the world economy played out in individual homes: including layoffs, reducing work hours, creating an inability to finance home buying, and diminishing stock portfolios. For about the first six months of my data collection, conversations with older adults were about the barriers to moving or revolved around themes of non-moving. People started a number of conversations with the sentiment, “I want to move this year, but I cannot afford to.” This recession created great emotional uncertainty about the financial futures and financial decisions related to housing choices for older adults.

Many of the participants in the study had been proactive about planning their moves, but because they were unable to control their financial futures, feelings of apprehension were ever-present. Many of the participants had actively and proudly saved for old age, with the intention of not burdening others with either finances or care. However, their intentions were not achieved. I argue that the desire not to burden others stems from both Western ideas of individualism and also from being impacted by the great depression in terms of frugality in consumption patterns and consciousness about saving.

Decreased Asset Valuation

Worry about diminished stock portfolios lead to reluctance to commit to the cost of a retirement community, both in terms of down payment and in terms of monthly fees. A strategy of “holding out” or delaying moves until the economy improved seemed to be an option that would be chosen by some. I initially joked that my study was becoming a study of non-movers, and found recruitment of people who would actually execute their move within the two-year timeframe allotted for data collection to be difficult.

As housing choices and concomitant costs are one part of retirement costs, decreased asset valuation led to a rethinking of retirement budgets both in the present and over time. Given increased longevity and increased costs of long-term care, the timing of the move was re-examined by many movers.³²

Housing Market Insecurity

Study participants were concerned about their housing in multiple ways. First, some were anxious about the decreased value of their homes. Persons who were planning moves had often counted on proceeds from a house sale at a certain amount based on housing market trends in the last few years. Coming to terms with housing values that might be much lower was difficult

³² In August 2011, the U.S. and other global markets experienced a significant decline. In fact, some attribute the drop to the sixth worst drop in the history of the U.S. stock market. I took the opportunity to visit some of the movers in the study to understand the impact of the market’s instability on their housing choices. I expected concern about the ability to pay monthly fees at the retirement community. Instead, I encountered responses of non-emotion, with several people telling me that they’d lived through many stock market crashes. In fact, one participant remembers the stock market crash of 1929, as he was nine years old. Many of them said that they had seen the rebound from the 2008 crash. Several also said that in retirement, they were not anticipating large returns on their investments, or as one man told me, greater “interest,” because he had consciously moved his money into things that would yield less “interest” because of their age.

emotionally and financially. Many persons' financial equations were built upon a certain housing value. Reduced proceeds from sales would factor into which down payment plan persons would choose when moving to a retirement community or condo.

Another great concern was an inability to sell one's home. The local economy seemed to have some homes in a certain price range that remained on the market for a long time. One pair of movers worried about the length about the time his house was on the market and the inability to find a buyer moving to their town in Michigan who would be able to afford such a home. When I was visiting this couple, as we drove through the town, she identified two potential buyers, a newly hired basketball coach and a newly hired doctor in the town. It was interesting to me that she would be able to discuss the market with such specificity. On the other hand, their home, set on a lake, would also be a potential second home for others. We discussed at length how to tap into the second-home-buyer market in larger urban areas. In the end, that was the type of buyer they found: a family from a large urban area that would bring the family to the lake house every summer. Those with higher priced homes seemed to have more anxiety about selling due to the lack of buyers. Thus, this study is also a study of wealth and jobs leaving a state, with few known options to replace them.

A third way that the uncertainty in the housing market troubled movers was in apprehension about potential buyers being able to secure financing after bidding on homes of study participants. The buyer mentioned in the previous example had great difficulty securing financing and the movers had great anxiety about the process.³³

³³ In another case, banks scrutinized where the buyer would obtain their income, not understanding the income stream of a medical resident. I suggest the scrutiny was a response to the crisis, as banks put potential mortgage holders through tedious processes.

Lastly, the global financial crisis led a small group of movers to rethink home ownership. One mover asked me if I'd read the Time Magazine article on the topic. Others were happy to give up home ownership for renting a unit at a retirement community. One mover told me about his great anxiety in negotiating with buyers who wanted the windows in their home to be able to open. He was ready to give up worrying about all the things that could go wrong in his original house until the day of closing. He was losing sleep over the inability to open the windows in his house.

3.2.2 Availability of Senior Housing

Older adults' moves are contingent on external factors, such as the availability of housing for older adults in a given community. Definitions of what constitutes local and non-local moving come into play when older adults learn of a new housing development in a neighboring town. Sometimes senior housing near one of their adult children sparks an interest in considering relocation.

In this study, many of the participants moved into a newly built CCRC. Their moving plans were often dictated by construction schedules and financing concerns of the building project taking place in the aftermath of the Global Financial Crisis. Such schedules lead to delayed availability of a desired housing unit. At other times, construction was completed faster than expected. While some of the permutations were due to the development of a new space, others were due to the fluidity of timelines present in many American senior living experiences such as those caused by waiting lists³⁴ for available units or renewed interest (often occurring on

³⁴ In the study, I met several older adults who had placed themselves on multiple waiting lists at long-term care facilities. They would also decline a unit if they needed to move in a short span of time.

a yearly basis) when a community features its senior housing availability by offering tours every day for a week.

3.3 Reactions to Contexts: Patterns and Processes of Moving

3.3.1 Awaiting Options

Sometimes older persons themselves identify the housing they will move to. This is not surprising given the healthy and independent characteristics of the sample.

One couple interviewed had explicit criteria in terms of housing costs and taxes and physical layout of space. Mr. Brent described the criteria:

it [the new housing option] would of cost about half of what we—
got out of this, and that would allow us to put some portion of it away to do some remodeling [the new housing option] --...and then also we kind of have this set of criteria, that may be impossible to meet, but one of them has to do with you know the stairs, one floor, close within the mile circle [to downtown]. Then the other one is that our monthly taxes...

While this couple became more and more conscious of the challenge of using the stairs and also mentioned a friend who is restricted to going up or down the stairs a certain number of times, the couple also has a financial criterion that will influence their next move. Mr. Brent continues on, “I don’t know how you can make a public policy or tax—you know policy in a city, which would encourage people who have homes that are—size that families need them and those who don’t need them anymore can be able to move without making a big loss or going to a big expense.” The couple has also articulated an opinion about disincentives to move that exist for

them. They will stay put in their home until a house they that meets their criteria comes on the market.

3.3.2 Varied Processes of Moving

This study was designed in terms of three phases of a moving process: pre-move, moving event out of the original space, and post-move adjustment. However, in actuality, moving took many permutations. Some older adults sold or left one space and then inhabited a second dwelling. Others, by choice or because their homes could not sell, moved first and then worked to either leave and/or sell their original space. However regardless of the permutation, moving became a phase, rather than an event lasting a day or a weekend.

While the ability to move on their own schedule was facilitated by having the means to support living in two spaces, moving as a phase rather than a punctuated event created a moving environment where older adults were less rushed or stressed. However, it also meant that the moving process became a life phase that one could inhabit for months, if not years.

For example, Ms. Grant has already paid for her place and has gotten the keys. However, she has negotiated with the retirement community not to pay the monthly fee until she is actually sleeping there. She plans to fill one to two boxes every day for the summer, with a procedure of emptying the boxes contents on the table in her living room and then putting objects away.

Photo 3.1 – Box Used for Moving Objects Daily



In approaching her move one box at a time, she can control the amount of objects to be unpacked as well as the need to feel that she has to deal with all of her objects at once. These back and forth trips keep her busy. She can only do this because she is able to hold onto both residences without deep concern for the costs to operating in two different spaces. She said that she worked with her financial planner so that the sale of her house is not factored into her financial planning. In fact, she told me that she is prepared for her house to take three years to sell. She said that she never wanted her house to put food in her mouth.

Interim Moves

Given the two patterns of moving witnessed in this project, moving first and selling later, and selling first and moving later, I will now discuss the latter experience. For all the anxiety

about the housing market at the beginning of the project, some study participants' houses sold faster than expected. In fact, the quickness of the sale led to several options, either securing transitional housing until retirement community unit was built, accelerating the moving plan to accommodate for buyer's wishes.

In the case of Mrs. Queen, she sold her horse farm about two years before the building project completed her unit. She was one of the first persons to commit to moving to the retirement community and due to delays in both building permits and funding, she sold her house long before her unit would be ready. When I met her, she was in her small apartment with several large pieces of furniture in her living room. She had already made the move from the original home into the apartment and was now awaiting her new unit in the retirement community that would be larger.

In the case of Mr. and Mrs. York, they sold their house one spring, but their unit was not ready until the end of the summer. The retirement community also had rental apartments, and the couple moved there for three months at a discount because they were already committed to leasing a unit once it was done. While Mrs. Queen had decorated, Mr. and Mrs. York had two recliners and a card table in the living room, and lots of bins of items they were planning to sort. They knew that the place was temporary and were relieved that their house had sold, especially because the buyer's financing came into scrutiny³⁵.

³⁵ One reason the buyer was scrutinized was because he was a medical resident. The bank viewed income from resident fellowships differently than from salaried positions. While the buyer held the promise of a high income, his residency fellowship was modest.

Photo 3.2-Interim Move Décor



Photo 3.3-A Life in Transition



1 Mrs. York: So we kinda lucked out there. And it is, ooh, ok. I would not

2 Tam: Yeah

- 3 Mrs. York: recommend this move twice. That is really...
- 4 Mr. York: Once is about once too many times. But uh
- 5 Tam: Yeah.
- 6 Mrs. York: It's expensive and then uh, so we pack things to go in storage and
- 7 we think, we've brought, maybe brought too much stuff here, but
- 8 when you're at that point of, you have to make a decision.
- 9 Tam: Right.
- 10 Mrs. York: You can't sit around and think about it, we have to do this. Ahhhh.
- 11 Tam: Yeah, yeah
- 12 Mrs. York: It is uh, not the best way to go.
- 13 Tam: Yeah
- 14 Mrs. York: I wouldn't recommend it.

These varied moving experiences impacted the emotional, physical and financial concerns of older adults. This also highlights the methodological challenges of studying relocation as a process and argues for re-examination of research design for the relocation literature. If researchers frame moving as a linear experience of transitioning directly from original housing to newly inhabited housing, many older adults would not fit into this framework. Original housing, at any one point in time, may actually point to a primary residence, a vacation home, and/or a relative's home. Moreover, moves may also entail the selling-off of other assets, such as uninhabited parcels of land. At least two persons in the study already had a place in one retirement community in a Sunbelt state, which she planned to retain even as she moved from her home to another retirement community. Another study participant,

Ms. Zachary, moved from another retirement community because she was looking for a community where it might be easier to meet people. As someone without children and a partner, she told me that the conversations about grandchildren and other family members made it difficult for her to contribute at her original retirement community. Additionally Ms. Zachary also was leaving her home, where she had lived during her working life, and selling off the contents of her mother's home, before selling her mother's home. Thus, methodologically, tracking participants' opinions about transitioning to retirement communities must also account for their own experiences with other residential facilities.

When scholars also address experiences after relocation, the number of dwellings an older person has after relocation may be more than one. In addition to having homes for recreation, e.g. a lake home, they may also maintain and support other homes for loved ones. For example, Mrs. James told me that she thought ninety percent of the residents of her retirement community were happy to “just get out of the stress to commit to owning a home.” Furthermore, as a mother of a son with lifelong disabilities, she maintains another home for her son and his roommate, including maintaining the lawn and making repairs. She told me that by moving to a retirement community, it “relieves me from the pressure of having to run two homes.” (Personal communication, 2012).

3.3.3 Relationships Between Buyers and Sellers: Spatial Stewardship

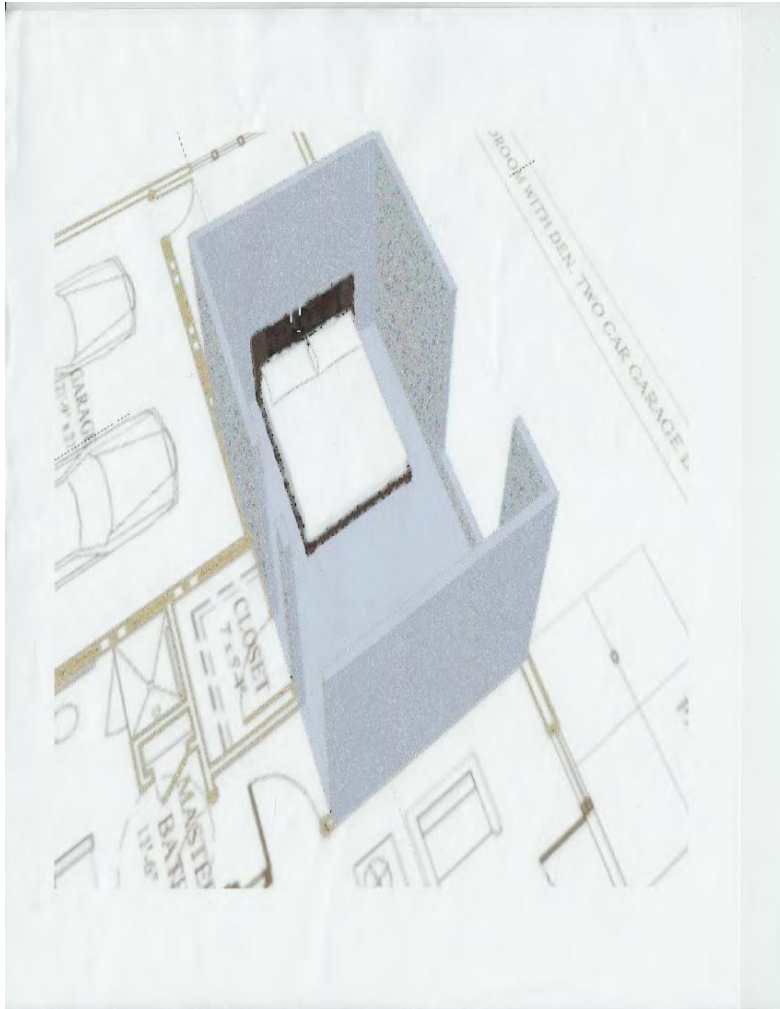
Moving created an opportunity for older adults to leave a space and inhabit a new space, to “break the house” according to Marcoux (2000). Additionally, moving becomes a time for new buyers/renters to inhabit the spaces left behind by movers. The circulation of residence happens everywhere and in various forms. For instance, Mr. and Mrs.'s York's interim phase

was a direct result of the new buyers' need for their new residence to be available when the lease on their rental residence expired. However, their ability to buy the house was also based on their ability to secure financing for a medical resident whose mortgage lending institution calculated fellowships (more common in medical residency) differently than salaries. For the moment of housing transactions, their lives become intertwined. Intimate details of professional choices, formalization and categories of monetary compensation come into play.

Additionally, expectations of what a home is and the condition of a home at the time of sale is foregrounded. For instance, Mr. Chaney, who maintained his custom built home in detailed ways after retirement, lost sleep over whether every window on his house would be able to open when this was demanded by the buyers. He expressed shock to me as home maintenance took much of his time and he prided himself on having a nice home³⁶. For example, his wife and he hired an interior decorator for the new housing unit who helped them determine what size bed would be visually appealing in the space and which interior paint colors would create a flow to the home. See figure 3.1 for a three-dimensional CAD drawing of the bed in the new space.

³⁶ When I first met him, he was disappointed that others on his block were not his age as he thought those who could afford to build on their street would have had to save a lot of money, and he did not expect the age composition of his street to be young couples with children. Here I suggest that he prided himself on having attained the wealth to own such a home.

Figure 3.1- CAD Drawing of Bedroom



In addition to the physical expectations of home and home condition, I also encountered emotional ties potential buyers had to prospective homes. While in this study, I did not meet many of the buyers or renters of the older adults' residences, I did encounter prospective buyers from out of state who seemed to already imagine themselves in the new spaces.

In the letter below, they discuss the ways that they made connections with the owners, Mr. and Mrs. Johnson, whose home is the only home the Johnsons had ever sold.

Figure 3.2 – First Page of Letter

April 12, 2011

Dear Mr. & Mrs. Johnson,

Our names are Sally and Sue and we are very pleased to make an offer on your house.

We hope that you won't mind, but we wanted to write you this letter. We thought it might help to make the process a little more personal.

When we pulled into your driveway on Saturday we immediately felt something special, and as we toured through the house and yard a tremendous feeling of excitement was building in both of us. After seeing your house again on Sunday, and thinking on it for two days, it is clear in our minds now – we are in love with your home!

It is apparent that you have cherished living in this house for forty-two years. What a legacy you have created! Every little thing seems so tenderly thought out and so perfectly executed. We admire your remarkable attention to detail, your commitment to making repairs and updates, and your design choices. The excellent condition of your house testifies to these things. And, you maintain such a clean and tidy home! It is just beautiful to us. As people who keep a home in similar fashion, it is reassuring to know that you have maintained the property with such care.

Of the many attributes we appreciate in your house, foremost is the peaceful, welcoming aura that it radiates. We felt it when we first walked in. It feels just like "home" should feel. Secondly, we are enamored with your yard – what a tremendously gorgeous space. We envision many happy hours spent tending to the garden and sharing memories with family and friends on the deck.

Another reason we feel so comfortable at your house is that your decorating style and taste in furnishings are similar to ours, and we can envision our belongings fitting nicely into the space. Coincidentally, because we live in State we were immediately struck by the ceramic-based lamps in your dining room and the one in your living room – we recognize these! Do you know: are yours made by a craftsman in City, State named Full Name? We have several lamps of his in our home! We also happened to notice the book about State on your coffee table, which naturally gave us an added warm feeling.

Figure 3.3 - Second Page of Letter

Because your decorating style is so similar to ours, and because we don't yet have furnishings to fill a house the size of yours, if you were willing, and if it would make things easier for you with your upcoming move, we would be pleased to discuss the possibility of purchasing some of your furnishings.

To give you a sense of who we are:

Sally was born and raised in City, State. She attended Name College in City, State. She is currently in her fourth year of medical school at University. In March Sally was granted her top pick of programs and was assigned to the Name of hospital for her residency in neurology. Sally's first day on the job will be date.

Sue was born and raised in City, State. She attended Name College in Place. She has worked for the past seven years in the development office – managing a database, writing grants, and working with donors – at a nonprofit organization called organization .

Sue's father is a retired botanist (he grew up in Place) and as a result she has spent many wonderful days of her life around plants and at the arboretum where he worked. Sue will be looking for a new job in City. _____

Interests of ours include hiking, running, gardening, local agriculture and foods, reading, travel, and spending time with our families. We have a tabby cat named Cat. We own a house in State which we're selling; it is under contract for a May 12 closing.

We want to finish by saying that it would be an honor to become the new stewards of address of home. We will work hard to carry on the tradition of excellence that you have established in caring for this special property.

With respect and thanks for your time and consideration,

Sally Samson and Sue Schulz

In the letter, the prospective buyers extol the virtues of the physical space, the gardens and the objects themselves placed within the home. The lamp mentioned is connected to a location where the creator of the object is from. Next, they state the artist's name. Next, they go on to

say that they are also owners of lamps by the same ceramic artist. Then they reference a book on a state that “naturally gave them a warm feeling.”

Through this one paragraph of text, they semiotically work to introduce themselves as buyers. They reveal many identities in succinct ways. They draw on their ability to recognize a regionally specific art form, a ceramic lamp by a particular artist to establish their position with relation to the lamp, the house, and their state. They are persons who would own handcrafted goods, and would know of an artist from a small town. They are also people who see a home for more than its physical layout; they noticed “attention to detail,” “commitment to making repairs” and “clean and tidy” attributes. But while the fastidious buyers are “people who also keep a home in similar fashion,” they also want to purchase some of the objects in the home.³⁷ They have already envisioned themselves and their objects in this space.

In the second page of the letter, they openly reveal their identities. They name their respective birthplaces, professions (even one’s parent’s professional background), educational backgrounds, hobbies, pets and home ownership. The latter identity indexes renter versus buyer, potential for having home equity to be used as a payment yet also potential drawbacks--what if their buyers fall through?--and also a date when they will be without residence (May 12).

They are also carrying out a sign, for those who can recognize it,³⁸ of environmental stewardship. Not only is one of them employed by a farm on the National Landmark, they also

³⁷ Selling some or all of the contents of a home with a home was not unusual. Tools were often seen of as staying at the house, in some cases, as an attempt to increase the home’s value.

³⁸ Here I refer to risk in recognition of signs. Webb Keane’s work on signs of modernity also points to the various meanings that the same sign can have for different individuals and groups.

list hobbies as gardening, and local agriculture. One also works in education, therefore bringing ideas of environmental stewardship to next generations, in the same way that they would like to bring stewardship as the next owners to carry out “a tradition of excellence.” They present themselves as stewards to send a message that they will take good care of the couple’s home. Figure 3.4 on the next page shows the letter written to the potential buyers by the sellers.

Figure 3.4 - Return letter

April 15, 2011

Dear Sally and Sue,

Thank you for your letter and very kind words about our home. We appreciated your thoughtfulness and felt that a response was in order. As you will see, we have some interesting Former State connections.

It was in June, 1969, that we moved to our Current City from Former State and would you believe – from City, Former State! So to give you a little synopsis of our lives, we have listed some things below.

- We both grew up in City, Current State – close to a Great Lake.
- Joe was in the Army while Jane was in college and we married soon after.
- We moved to Capital City, Current where Joe went to University and received his degree in Landscape Architecture/Urban Design while Jane taught elementary school.
- One of his University professors encouraged him to go to Former State, where he was returning, to work with a well-known Landscape Architect, whose office was in a big house on the shores of a Lake. (One of Former Boss' grandsons now work in Current City at XYZ, the firm that Joe was part of for 30 years, until retirement.)
- While in Former State, we rented the main part of the farm house, on a 400 acre farm, owned by Al Anderson on the road to City.
- Hiking, cross country skiing, picnics at Beautiful Place, etc. were very much a part of our lives at that time.
- Each summer we would return to Former State and either stay at a cabin on a Beautiful Lake or camp at the reservoir in Another Lovely Place. Jane and our young daughter would drop the boys off at a point along the Long Trail so they could hike/camp out and then pick them up at another point a few days later.
- Special Museum was a favorite place to visit!
- Re the lamps – we knew Artist personally as he lived in Former City at that time and that is why we have the lamps.
- We left Former State – thinking we would return in two years but that has not happened. We have many special memories of and friends still living in Former State.

The list could go on . . . but we will stop for now. At least you can see that we do have some interesting connections. Whether the sale of the house will go through or not, we wanted to thank you for your letter.

Sincerely,

Joe and Jane Johnson

In this return letter, the sellers also disclose much personal information. Here, they explain why they left former state and disclose that Mr. Johnson was a landscape architect. Secondly, they index places they rented, their hobbies and their continued return to that state every summer. They also write that they knew the maker of the lamps. They also disclose that they had wanted to return to live in this beloved state but it did not happen. Lastly, they state that regardless of the transaction, they appreciated the letter.

In the end, the new buyers did purchase the home and some items in the house. The list in Appendix Five features the plans for each week before the sale. The sellers sold items color-coded in blue and gave away items coded in black, with some of the items in each category going to the new buyers.

Figure 3.5 – Items to be Given or Sold as Part of Move of Older American Couple

ITEMS TO GIVE/SELL – from 2010

May 19, 2011

Blue - \$

Black – to give

- Lawnmower Jim
- Wheelbarrow TWL
- Extension Ladder Bob
- Blower – Hedge Clippers Bob
- Oak bedroom furniture/lamp Kelly
- 2 – 4 drawer files Sally & Sue
- Roof Rake Sally & Sue
- Snow shovels Sally & Sue
- Misc. garden tools (shovels, rakes, etc.) TWL
- Carpet piece (5x7) Sally & Sue
- Carpet piece (9x11) Sally & Sue
- Sleeper sofa in family room To Friends in Deed
- Twin beds & frames/bedding Mike & Beth
- Freezer Bob
- Cabinet in Garage Bob
- White circular table (42”) Sally & Sue
- 2 Camp Chairs Bob
- Humidifier Sally & Sue
- Dehumidifier Sally & Sue
- Picnic Table Charles/neighbor
- Full size bed/frame/bedding Friends in Deed
- 3 drawer wood cabinet TWL
- Fax machine Goodwill
- Fire place set Sally & Sue
- Teak phone bench Adam
- Tonka’s Bob
- Tarp (11x15) Mike & Beth
- LP’s Kiwanis

Mr. and Mrs. Johnson gave me the list of items to be given or sold. They color-coded the items to be sold in blue and the items to be given in black. Other recipients include the children

of the couple and local social service agencies. Through e-mail, Sally and Sue had identified items that they would be interested in purchasing as part of taking ownership of this particular home. By transferring ownership of the requested items to Sally and Sue, the couple leaves both the home and a few contents to the new buyers to entrust the stewardship of the space. Their common interests (hiking, love of the outdoors) as well as their material possessions contributed to both parties feeling positive about the sale.

3.4 Application of Theoretical Frameworks

The application of SOC model is evident in several ways in this chapter. First, the selection of living in a less demanding environment in order to achieve the goal of maintaining one's independence occurs in a variety of economic and social contexts. Concerns of affordability run through the decision making contexts as selection of living in a less demanding environment meant that optimization through enriching emotional and physical reserves might also result in depleted financial reserves. Mr. Brent explicitly discussed the need for a tax policy that would create a financial incentive for older adults to move, given the benefit to their physical well-being. Mr. Brent's suggestion offers another aspect of the SOC model. While the possibilities of optimization are multiple, for some individuals, optimization may occur in some areas but not others.

By selecting living in a less demanding environment with optimization aims of enriching their reserves, the older adults in this study also experienced serious depletions of their reserves due to the challenges of moving. In addition to financial concerns, the older adults who had interim residences faced the stress of moving multiple times. Living in transition, in cramped spaces with boxes and little furniture, added some discomfort. Others felt the stress of meeting

the demands of buyers and hoping their house sales would be completed. On the other hand, some found great excitement in learning about the backgrounds of the new buyers and felt satisfaction that new buyers would be good stewards of their beloved spaces.

Despite the work of moving, most saw living in a less demanding environment as a way to optimize their lives. Some thought they would experience more and richer social contact, while others thought they would have less worry because of being renters rather than homeowners. The SOC model applied here in these economic and social contexts directly impacted the ways the goal of maintaining one's independence could be achieved.

3.5 Conclusion

In this chapter, the backdrop for the study is explained. The impact of the financial crisis on the participants in the study cannot be underestimated. Many conversations with them addressed their decreased assets, their inability to sell a home or their need to sell a home at much less than expected a few years earlier. Moreover, the local economic climates affected older adults, who often kept informed of the available senior housing in the area.

Older adults reacted to these contexts in various ways. Researchers argue for the need to understand the decision-making processes that lead older adults to switch from a contemplative to an active stage in the process of moving (Bekhet et al., 2009; Erickson 2003). Some had developed specific criteria that would make them consider a move. Others had to move faster than expected due to the quick sale of their home after concerns about the new buyers' ability to secure financing. Lastly, in the process of selling homes, relationships were formed between buyers and sellers to secure the sale of the home in uncertain financial times. Despite the

uncertainty and complicated contexts and the toll on bodies when undertaking a move, especially for those where moving became a phase of life, moving was a conscious choice to make a gift to themselves, their partners or their kin, as will be explored further in the next chapter.

Chapter Four

Moving as a Gift

4.1 Introduction

Discussion of accessibility, mobility and activities of daily living often frame academic studies of relocation. This chapter offers the emotional motivation of gift giving as a rationale for moving. This is both a twist on why older adults move to retirement communities or smaller, more accessible spaces and an alternative way to examine gift-making practices in older adulthood. While often gifts to descendants are thought of as monetary inheritances or personal property, this chapter looks at a gift that is processual. Implicit in a processual gift is the extension of temporalities, between a present and future self and between an individual and others.

In this chapter, I will show how moving functions as a gift. These gifts are bestowed on oneself and others in various ways. After providing examples of how moving is a gift in part one of this chapter, I argue that autonomy and personhood are preserved in making this gift voluntarily. However, gifts are not made and received without consequences. Mauss (1925/1990) argues that there are three obligations in gift-giving: 1) to make a gift 2) to receive a gift and 3) to reciprocate. All of these obligations extend temporalities for the individuals involved. In the case of moving, the older adult offers moving as a gift

with various motives. This gift is made in light of a history of relationships and gift-giving within a kin network. The examples below illustrate that recipients of gifts may be a future self, a partner, or a family member who may not always view the gift as beneficial. In fact, some scholars suggest there is danger inherent in gifts, in both the need to receive a gift whether it is wanted or not, and the need to reciprocate it (Mauss 1925/1990). There is an obligation to reciprocate the gift of moving, discussed in this chapter and in chapter seven. Partners and family members consider different ways that they can reciprocate, with obligations sometimes affecting their own priorities.

4.2 Complexity of Moving

The process of moving, regardless of the pathway, intertwines emotional and logistical concerns. During their moving day, while I helped them unpack their boxes, Mr. and Mrs. Lewis spoke about the complexity of the various components of moving.

- 1 Mr. Lewis: the only emotion yesterday was the loss due to wreckage, I think.
- 2 Mrs. Lewis: And the day before was because we were leaving home again and
- 3 probably... we may go
- 4 Mr. Lewis: Probably the last time, we'll go back...
- 5 Mrs. Lewis: We may go back and visit but it will be different. We'll never live there
- 6 again.
- 7 Tam: Yeah, yeah.
- 8 Mr. Lewis: We were born and raised there, we moved back to the old
- 9 neighborhood.
- 10 Tam: Yeah
- 11 Mr. Lewis: We were married a block from there. I went to school kiddy corner.
- 12 She went to school on the grounds where the host works.
- 13 Tam: Oh my goodness!
- 14 Mrs. Lewis: I'm, our house was on the football field where my brothers played
- 15 football and I watched the football team.

16 Tam: Oh my goodness.
17 Mr. Lewis: And our mothers were in a nursing home a block in the other direction.
18 I went to junior high school kiddy corner from the area
19 Mrs. Lewis: I went to church and school a half a block from where I was living. I
20 rode my bike on the same streets I rode my bike as a child.
21 Tam: Wow.
22 Mrs. Lewis: And, so, it was a nostalgia trip to go back. And it was hard to leave, and
23 Tam: Yeah. I'm sure.
24 Mrs. Lewis: leave family there
25 Tam: Yeah
26 Mrs. Lewis but our kids and our grandkids are closer. They're here, and that's
27 what...
28 Tam: They're here
29 Mr. Lewis: We want to have, put them through
30 Tam: Yeah.
31 Mr. Lewis: what we had to go through to go home.
32 Mr. Lewis: And If we need assistance here. They're here. They'll help us.
33 Mr. Lewis: To pick up the pieces, resolve the state, disperse all the stuff.
34 Tam: Yeah. Yeah.

Here Mrs. Lewis switches from logistical concerns about broken items and the subsequent need to file a breakage claim with the moving company to the expression of various forms of loss. For her, losses are heartfelt in terms of leaving a place that embodies remaining family connections, a childhood roaming ground and a place where they recently buried kin. Yet, the couple chose to move near their adult son, his wife and their grandchildren. They do not (line 21) want to put their son through a similar truncated experience as when they left their livelihood and home to take care of their mothers in a nursing home a few years prior. Thus, their move serves as a gift to their children, who will not have to interrupt their personal and professional roles to take on the role of caregiving. Mr. and Mrs. Lewis are leaving the

space of their ancestral lineage as a gift to their children. Yet, in making gifts, older persons mourn people, places and things left behind. In this move towards their son, Mr. and Mrs. Lewis move away from relatives of their own generation. Mrs. Lewis told me that she was sad that she will no longer live close to her brother after she enjoyed seeing him regularly in previous years.

It is also evident that Mrs. Lewis expects her sons to help them in the future if needed, although this is not explicitly defined by the family. Moving closer to one of her sons will facilitate the ease of the expected care. She also acknowledges her mortality and trusts that her children will handle the estate, although she asserts that the time for that is not imminent. Obligations were created in the short-term as Mr. and Mrs. Lewis spent significant time living in their son's basement while overseeing the construction of their new home. For their son, receiving the gift of a move meant his parents moved in with his family. Over time, the obligations created by the gift of the move will be reciprocated by their sons. While the gift was made with the intent to ease caregiving, the close proximity may also contribute to other complications for the son, such as balancing childrearing with caregiving for his parents and balancing lawn and home maintenance of his home with theirs.

Though Mr. and Mrs. Lewis do not explicitly state that their move is a gift to their children, they are deliberately exercising their agency to alter their lifestyle because they have experienced the challenge of caring for their own aging relatives. Their life histories of caregiving shall not be repeated. Instead, they relocate towards their children, rather than requiring the opposite. Their story, like those of all movers, is complex and will reappear in Chapter Five in a discussion on complications in completing the gift of moving.

I began analyzing the moving process of older adults in terms of gift giving after a brief encounter in an elevator with an older woman who had just completed a move. It was Older Michiganians Day 2009, which provided an opportunity for older constituents to bring their concerns to legislators. That year, housing and communities were one of the top three legislative agenda items. The

seniors were lobbying for ways to make the state a retirement destination, arguing that it could bring health care jobs that could not be outsourced. Secondly, it could bring income into the state that was drawn from national level resources, namely Social Security (see Appendix Nine). In a state that has been plagued by job and revenue loss, lobbyists clearly made concerns of older adults intergenerational.³⁹

As groups of seniors made their way to visit state senators and representatives, I met a woman, Bee, in an elevator. She came to the state capital often as she was very involved in lobbying for senior issues. I explained that I was a graduate student studying housing transitions. She shared her story of moving to a retirement village that, due to the recession, had been unable to finish building the village's infrastructure. They were in fact still fighting with the developer about his obligations. She told me that while moving, she looked at her granddaughter during the move and stated that her move was a gift to her granddaughter's mother. As we continued our wanderings to the politician's offices, arguing for the need for spending for older adults in the state to remain level in a climate of budget reductions I took this chance encounter to heart.⁴⁰ Moving could be conceived of in gift-giving terms.

I argue in this chapter that moving can be conceptualized as a gift in three ways: to oneself, one's partner and one's kin. The chapter provides evidence of how these gifts play out and how the stage will be set for the subsequent chapters which address barriers to completing the gift of moving and complications arising from considering moving as a gift. There are detailed ways that gifts were seen as benefiting the older adult who was moving, as well as advantaging their partners who were also moving. Kin who were not moving themselves were also recipients of the gift of moving. However, gifts are not always beneficial. There were obligations imposed and unintended implications experienced by the older

³⁹ The framing of older adult concerns as intergenerational is not novel. Historian William Graebner (1980) argues that the Social Security Act, often lauded as a protective support for aging Americans, was also seen as a way to secure jobs for younger workers. In fact, the motto of the Townsend Plan, the precursor to the Social Security Act, was "youth for work, age for leisure" (Graebner, 1980, p. 194).

⁴⁰ It is ironic that during the rest of my doctoral training, the topic of elevator speeches, or the type of speech that summarizes one's message, became more emphasized, when in fact, my dissertation idea sprang from one such succinct encounter.

adults and their kin in this study. I will explore all of these conceptualizations in this chapter. To begin, I consider the specific ways that people felt that moving was a present to themselves.

4.3 A Gift to Oneself

4.3.1 A Gift to Oneself: Navigating Spaces

“It’s a nice feeling” (Interview, 2011). Succinct, but true, Mr. Young’s description of the benefits of moving can be analyzed by thinking of this move as a way to embrace all aspects of his new life. Maintenance of one’s life includes repetitive chores like laundry and dishes. And Mr. Young is not alone in being concerned about the physical toll that navigation of spaces takes on older adults like himself, both as an emotional preoccupation and as a physical endeavor. For some, maintenance of chores requires navigating one’s space so that even if these tasks are eventually completed, the physical layout of space slows or prevents the ability to finish the activity.

Mr. Young told me that he and his partner started thinking about moving when they grew tired of going up and down the stairs to complete the task of the laundry. Having laundry on the same floor as their primary living space would improve their quality of life. They considered both condos and retirement communities but decided that rather than moving to a condo which would have to be sold a half a decade later, it was easier for them to move to a place that would not require him, his wife nor their children to resell the condo.

However, to complete the gift of moving, Mr. and Mrs. Young labored extensively to renovate their home to prepare it for sale. They spent a significant amount of money updating the space to appeal to buyers in a slow housing market. In order to achieve their gift, they spent money that may not have been spent if they chose to remain in their home. This case is an example of the potential danger in a gift, where the couple may spend money on housing updating which may not be regained at the sale of the house.

I also talked with Mrs. Sand about how she managed laundry as her washer and dryer were located in her basement. An avid swimmer, she had to launder wet (thus heavy) bathing suits several times per week. She would put her suits and other laundry into a laundry bag and throw it down the basement stairs. After finishing the laundry, she would drag the bag on the floor to the top of the stairs or wait until her handyman's weekly visit when he would bring it up to her living space two floors above her laundry area. By having laundry on a first floor in their new residences, residents felt relieved and more assured that they would be able to continue maintaining their laundry. Despite the fact that they were completing routine chores, they were able to navigate spaces in a new manner that required less physical exertion and risk of falling.

Below is a conversation with Mrs. Sand.

1 Tam: And well even when I see you here, you're going to enjoy things
2 more I believe. So much, the laundry—
3 Mrs. Sand: Oh god, every time I run the dishwasher, which I have to move to
4 the sink—
5 Tam: Yup.
6 Mrs. Sand: you know every time I take the laundry up and down, or bring the
7 mail up, or anything, I think god I only have a few more weeks of
8 this. Only a few more weeks of this.
...
9 Mrs. Sand: I mean it was the same thing over there when I go to pack up I said,
10 "Why is it getting so hard." Then I realized I'm a year older. My
11 balance is worse; it's harder for me to get on the ladders to put my
12 stuff up in my vent storage. Uh you know, it's, it's harder for me to do
13 things around the flat.
14 Tam: Yeah
15 Mrs. Sand: And uh fixing things that I would have fixed in the past. I can't do it

16 anymore you know.
17 Tam: Yeah
18 Mrs. Sand: It was just—I was just overwhelmed there.
19 Tam: Sure
20 Mrs. Sand: So I didn't even sleep the night before.
21 Tam: Wow
22 Mrs. Sand: It was the first time in my life over there that I didn't sleep because I
23 couldn't get packed up.

Mrs. Sand is an older adult in the study who owned two housing units, one in the Midwestern United States and one in Europe. Mrs. Sand moved locally and here Mrs. Sand expresses both excitement at leaving her home, as well as difficulty with this year of travelling back-and-forth to her apartment overseas, which she plans to maintain. As I knew her, I realized her paper-based challenges that became exacerbated by living in two places.

Photo 4.1 – Cluttered Apartment



She told me that she hoped when she purchased her new apartment that it would not have become as cluttered as her house had, but over time, it also had become cluttered. During the weekend of her garage sale, her niece also told me that her aunt's clutter—mostly unread papers and mail—had accumulated much more in recent years.

As Mrs. Sand ages, she is aware of the effort to navigate her spaces and looks forward to a life where spatially she is living on one floor rather than her two-story walkup. Moving may help her with laundry, but it may not help her with her mail and paper collection. In fact, there is possible concern that her new space, chosen for ease of navigation, may become filled with papers and other objects. In addition, while her new space offers ease with respect to chores such as laundering her swimsuits, she has given up her membership in her beloved swim group as the retirement community is too far to allow her to maintain it. Thus, the gift of moving is not always beneficial. In fact, there is potential danger in modifying one's long-established social connections.

4.1.2 A Gift to Oneself: Freedom From Home Maintenance

Some people moved because they were ready for freedom from home maintenance. In “home maintenance,” I have included interior and exterior maintenance of one's space. Interior maintenance can include repairing broken light fixtures and repainting walls, as well as plumbing concerns. Exterior maintenance can take on many forms including painting, snow shoveling, and lawn care. For some older adults, there was seasonality to their feelings about their homes. People loved their homes in the springtime, but felt isolated in the winter. The isolation depended on things such as whether they left their homes to participate in other activities and whether guests were concerned about driving to their homes in the winter. Quite a few mentioned the hassle of plowing long driveways in the winter.

The senior living industry invites prospective residents through open houses, tours, and printed materials. Throughout the project, I collected marketing materials from various locations where movers

in the study would consider purchasing or renting new homes.⁴¹ Marketing materials offer testimonials about changed feelings about home ownership. In the brochure below, Mr. and Mrs. Keith write, “the large home we lovingly designed and built is no longer the fun, tranquil place it once was, but is becoming burdensome.” The home is becoming a liability which, in interviews with the couple, they told me was the result of a health complication of Mr. Keith’s. Therefore, the home itself glosses a changing health predicament.

“It’s been over a decade since our retirement and we have found that our needs have changed. The large home we lovingly designed and built is no longer the fun, tranquil place it once was, but is becoming burdensome. Our children put us in touch with [Name of Retirement Village] and urged us to take a look. At this stage of life, and in anticipation of the years that still lie ahead of us, we were delighted to discover that [Name of Retirement Village] provides much of what we need: a charming cottage residence with services to help us maintain an independent lifestyle; a clubhouse right at hand to provide opportunities for socializing, services and recreation; preferred access to a comprehensive care facility should we need it; and proximity to family. This clinched our decision to join as charter members of [Name of Retirement Community].”

In this case, changing one’s residence also changed their health context. The couple describes this change in two ways: “preferred access to a comprehensive care facility, should we need it; and proximity to family.” The advertising suggests that moving can be a way to “help us maintain an independent lifestyle.” Thus, moving can alleviate some burdens by providing freedom from home maintenance. However the relief from home and lawn maintenance, like all gifts, may be a double-edged sword. Research has also shown that older persons “centralize their environments” by decreasing the range of localities they frequent. In many cases, their living quarters become their primary activity zones (Rowles et al., 2003). With the reduction of the diversity of activities and increased housekeeping in their primary zones, “puttering” or the maintenance and ordering of the objects within a household become

⁴¹ One community in particular partnered with me for the project. My study also became part of their marketing materials. See Appendix Two.

increasingly important activities (Lang et al., 2002). Habituation practices such as watering flowers and straightening the house may become ways to order the day and the social world. Relinquishing these activities may lead inactivity may set in. While being free from home maintenance may seem appealing, it also means handing over these activities to another individual, or in some cases, a corporate body, to make decisions about maintenance. Mr. Keith disagrees with the retirement community's policies on clearing of brush. In a subsequent chapter, he struggles because he has given himself the gift of maintenance-free living and yet, he has strong opinions about home and lawn maintenance.

Mrs. Brown, age 82 at the time of her move, lived on 95 acres and had been widowed for a few years. She lived in a home that she built with her husband, a renowned photographer. She loved the small town where she raised her two sons, but was becoming burdened by her large property. She had a long driveway that needed to be plowed in the winter, and she found it difficult to navigate its deep, muddy rivets when the snow melted in the spring. She was delighted when she learned of a retirement community that would be built in her town because she could move to the new retirement community and still maintain her ties with the organizations that she had been a part of throughout her lifetime.

Photo 4.2 – Long Road



For Mrs. McGee, seasonal isolation was experienced in other ways. Please see transcript below.

- 1 Mrs. McGee: I feel isolated, in the sense of walking.
- 2 Tam: Oh, okay.
- 3 Mrs. McGee: (Talks to dog) (dog's name) will you leave her alone! You're
4 getting me very annoyed. [dog jumping on Tam throughout
5 interview]
- 6 Tam: So, that's a seasonal thing, because when it's not ice, you can
- 7 Mrs. McGee: Well, I don't like mud.
- 8 Tam: Okay.
- 9 Mrs. McGee: I don't like mud very much. You know, I, my husband, oh my
10 God! I don't want them to pave our beautiful, wonderful country
11 road.
- 12 Tam: Yeah.
- 13 Mrs. McGee: At this point, I wouldn't mind if I had a paved road⁴², and a paved
14 driveway.
- 15 Tam: So, are you saying to me that in the summertime, you do walk up,
16 up and down, or?
- 17 Mrs. McGee: Oh, yeah, well, I, in good weather,
- 18 Tam: Yeah, yeah, yeah, yeah.
- 19 Mrs. McGee: I walk...
- 20 Tam: So, it is a...
- 21 ...
- 22 Tam: Um, okay, so then, not so much the driving, but the walking you, you
23 Mrs. McGee: The walking
- 24 Tam: know the patch, cause you know your road well.
- 25 Mrs. McGee: Yeah.

⁴² At the beginning of our interview, she told me about her history with the road. She stated, "I was the one instrumental in getting it to be [designated] a 'Natural Beauty Road.'"

26 Tam: You've been here a long time, that, that you just know.

27 Mrs. McGee: Yeah, and that, that can be hard. And, I'm, I've seen so many older
28 people who've had falls.

29 Tam: Oh, yeah.

30 Mrs. McGee: And, I,

31 Tam: Yeah.

32 Mrs. McGee: so far, I've never fallen, [knocks on wood]

33 Tam: Yeah.

34 Mrs. McGee: and I don't wanna fall.

35 Tam: Yeah, no that's rough. The recovery is so...

36 Mrs. McGee: It's very, very bad. And (other dog's name), being a dog who
37 throws up, even some days I take him, I have a friend who lives just
38 two miles away on (name of road),

39 Tam: Okay.

40 Mrs. McGee: and that's a paved road, so it'll be two miles away. He can throw up
41 In the car going over there.

42 Tam: Oh.

43 Mrs. McGee: And, I feel, sometimes, I'll feel guilty walking without them, and
44 They don't get a walk, but I, I do that, I, um,

45 Tam: Yeah.

46 Mrs. McGee: I just drive two miles, and walk on her, on her road.

47 Tam: Oh, cause it's better.

48 Mrs. McGee: In the, in the winter. Yeah, cause it's paved.

49 Tam: Yeah, yeah.

50 Mrs. McGee: So, yeah,

51 Tam: Okay.

52 Mrs. McGee: I feel a little isolated about walking,

53 Tam: Okay so walking.

54 Mrs. McGee: it is nice, just to go out your front door, and that...

55 Tam: Yeah, and when you were younger, you did more, or?

56 Mrs. McGee: Well, I, I can't, well, sometimes, I don't wanna do it, cause I don't

57 want those dogs to be fil, particularly (Dog’s name) to be really filled
58 with mud, and
59 Tam: Yeah.
60 Mrs. McGee: come back in this house, and they just fill it, I’m not a great
61 Tam: Yeah.
62 Mrs. McGee: housekeeper. I mean, enough is enough, you know.
63 Tam: (Laughter)
64 Mrs. McGee: So, um, I can’t remember what it was like when I was younger.

She does not take long walks on her unpaved road in the winter for fear of falling because of ice. Mrs. McGee explains that she had stopped running in her mid-50s, so walking is now a form of exercise for her. As a current exercise instructor who leads exercise classes for older adults, Mrs. McGee possesses much knowledge about physical fitness. So when she says in line 25 that she’s seen people who’ve fallen, she has probably worked with them in their rehabilitative phases if they attended her exercise class. She makes the effort (lines 44; 46) to continue walking in the winter, by driving to a nearby paved road and walking there, usually without her dogs.

Mrs. McGee also disclosed another way she is seasonally affected by her built environment. Her friends refuse to come for book club to her home in the winter.

1 Mrs. McGee: When I have friends,
2 Tam: I was actually...
3 Mrs. McGee: who don’t like to come out here, I have to teach ‘em to come in the
4 back way.
5 Tam: Okay.
6 Mrs. McGee: I have a friend who is, she’s in better shape than I am, she’s four
7 years younger, but that curve in the road,
8 Tam: Yeah, yeah.

9 Mrs. McGee: she's sort of like afraid she's gonna, in the winter. So, I never have
10 the book group up here in the winter. Let's put it that way.
11 Tam: Okay, so you, you consciously choose that. Okay. Yeah, yeah.
12 Mrs. McGee: Well, because a lot of them wouldn't come out.
13 Tam: And they tell you that?
14 Mrs. McGee: Oh, yeah, well (female name) tells me.
15 Tam: Yeah
16 Mrs. McGee: So, we never have, we never have it here, but so what, so I have to
17 have my book club in the spring or the fall.
18 Tam: Yeah.
19 Mrs. McGee: (Laughter).
20 Tam: I see. So, yeah, that's a another way, is friends' reactions to...
21 Mrs. McGee: Yeah, but (gentleman friend's name) does not have an all-wheel
22 drive, but I think he always seems to get out here. You know.

In this transcript, Mrs. McGee describes how her particular home, set on a country road, affects her friend's visits. Her friend has anxiety about navigating the windy roads to arrive at her home. So Mrs. McGee plans to host the group at other times of the year. However, her boyfriend, visits regardless of the season (line 20-21).

Many scholars are concerned about social interactions of older persons. In "social relations, language and cognition in the 'oldest old,'" Keller-Cohen et al. (2006) explore the relationship between the number and types of interactions of persons 85 and older and task-based displays of cognitive and language abilities. She suggests that those with fewer interactions with family and a higher proportion of friends, scored better on those tasks. This suggests that family members may overshadow the need for older adults to communicate with the same prowess as family members might step in and advocate on their behalf. In her article, she notes:

The advantages were explicitly described by a 90-year-old resident:

A retirement center such as this is a most desirable place for people aged 65 to 100-plus to live. When I was still in my own home, there were days in the winter when I didn't see anyone : here I have so many friends to talk with whose interests and experiences are much the same as mine. Most people do not realize what a positive experience this can be. ... For communication, this is as good as it gets (2006, p. 598).

She is one of the few scholars who have offered data on what I term the seasonal isolation of older persons. I suggest that older adults, like all persons have relationships with their built environment, in seasonal terms.

Figure 4.1 – Spring and Moving Coming Soon



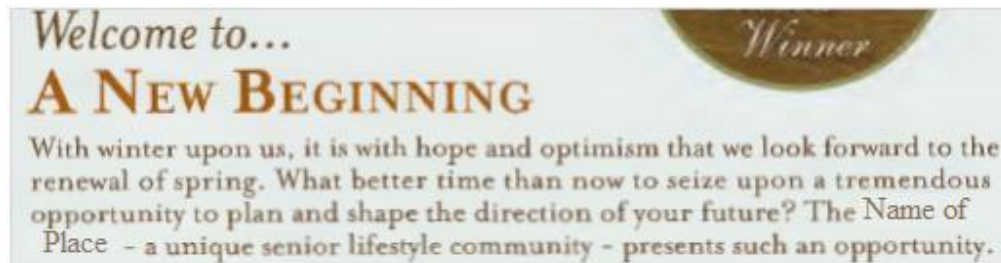
Seasons do not only influence people's mood and activities, but marketing directors in one CCRC also utilized the natural change of seasons to project another natural change – residences of older adults. Marketing also plays off on the seasonality of the older adults, by trying to highlight the dreariness of winter, but also that with spring, that can be a season for moving.

Figure 4.2 – Spring is Moving Season



This approach seems to contradict the data I collected from the older persons themselves, where spring is also a time to enjoy their homes, gardens and neighborhoods.

Figure 4.3 – Winter is a New Beginning



The marketing materials also suggest that it is a time to also “plan and shape the direction of your future.” The direction of the future of older adults is also fraught with uncertainty. The decision are hard to reverse. Also, the moves may come at other costs. For example, when spending their money on living in a retirement community, older adults and kin may view these costs as spending down their assets or inheritances. Additionally, while seasonal isolation affects some older persons, persons who are active like Mrs. McGee may experience decreased exercise due to lack of responsibility for maintenance after moving.

4.1.3 A Gift to Oneself: Enjoying the Fruits of One's Labor

Being resource rich near the latter part of one's life may open up possibilities that can be ways to bestow gifts. Some older adults place their assets into trusts that will pass wealth on to their loved ones, while strategically planning for the gifts' tax implications. Others work hard to live frugally in order to pass on more resources to their heirs. These practices will enable their heirs to receive resources as gifts. In this section, however, I focus on the individual's gift to himself, or a couple's gifts to themselves in the form of giving oneself permission to spend accumulated wealth accumulated.

When I first met Mr. and Mrs. Jackson, they already lived in an accessible home. Mrs. Jackson had been wheelchair bound since she was 17 when she lost her legs in an automobile accident. Their kitchen cabinets' were lowered to ensure that she could reach the items in the cabinet and her shower was equipped for her bathing requirements. I sat in their kitchen, wondering why since they had an accessible one-story home, why they would think of moving. They recounted to me that Mr. Jackson had seen several friends die and had also had serious health concerns himself so it was time to consider housing that would require less maintenance. They made appointments at many long-term care facilities in the community in a two-week period, sometimes visiting two or three in a day. They were determined to find a housing option for their next step together. When they visited the community they eventually chose, Mrs. Jackson said to me, "I knew it right away. I started to shake. I was so excited, I was shaking." She liked certain aspects of it right away including the layout and the look of the community. For Mrs. Jackson she also would be living in a community where she could access her neighbors' homes as easily as her own. While her own home had suited raising five kids and allowed her to operate a day care in their home utilizing the accessible paths in their backyard, she'd never been able to easily navigate her neighbors' spaces. The accessibility of the retirement village offered the possibility of a new way to bridge public and private spaces.

In addition to home maintenance, she also told me of their marital division of labor where he was in charge of the finances. Mrs. Jackson explained, “he more or less takes care of all the financial things and I had to ask him, ‘Can we afford to do this?’” Mr. Jackson had financially planned for retirement over his working career. Mr. Jackson took great pride in his lifelong financial strategies. With precision, Mr. Jackson showed me how he tracked everything spent in a month on a spreadsheet. When he was still working, he did not allow them to spend all that he earned. When Mr. Jackson got a raise, he allowed himself to spend only half of his increased salary. The remaining half he saved. Also, Mr. Jackson relished telling me that he had never earned a particularly high yearly income, but rather through his saving practices, he had accumulated plenty for him and his wife.

The gendered ways of preparing for moving can be seen in Mrs. Jackson’s needing to ask her husband if they can afford the retirement community. For her, she needs to request and be reassured that financially, they can afford such a place. Throughout their whole marriage, her husband has kept the finances and yet, she also contributed to the household production of wealth by running a childcare center at their home. However, her own labor of childrearing, housekeeping and employment are not discussed in the conversations I have had with them when talking about the affordability of the move.

Marketing directors of long-term care facilities have seen the tension that some older adults feel giving themselves permission to spend their resources rather than saving resources for heirs. In one interview with a marketing director, she told me that she had to convince older adults to allow themselves to spend the money on themselves. She tried to send that message that they’ve worked hard for your money so they should give themselves permission to enjoy it (Personal communication, 2010). However, affordability is often specifically defined by an individual or couple. In a world of marketing of new lifestyles by the long-term care industry, older adults must determine the financial viability of residing in a senior residence given the volatility of the housing and stock markets. Older adults must make projections regarding their own longevity, often accompanied by increased health care costs, as well as projections of their financial assets. While some, like Mr. Jackson, seem to be able to do this with skill,

not all older adults have the knowledge or skills to conduct such an analysis. In a follow-up interview with Mr. Jackson, I asked him about a recent stock market drop. He told me that since he had moved his investments to more conservative products upon retirement and prior to the move, he was not concerned. He did relay to me that some of his peers had expressed concerns to him about their investments and about the possibilities of the fees increasing at their retirement community.

Overall, conceptualizing a gift to oneself also encapsulates another preoccupation of some of the older adults in this study. Many were preoccupied with customizing their spaces, both as a way to enjoy the fruits of their labor, but also as a way to think of their new residence as a home that they will live in for a long time. I will address customization as a particular type of gift to oneself that occurs when older adults do the work of imagining a future in the subsequent chapter.

In this next section, I will consider gifts that are made to others that precariously may invoke obligation and reciprocation (Mauss, 1925/1990). The gift of moving can be exchanged for future instrumental or emotional support from partners or kin. For the latter, perhaps the gift of moving could be exchanged for expectations of family's involvement in later life. Since this obligation to reciprocate is inherent in gift-giving, these obligations may or may not be welcomed by kin who may have their own concerns or time pressures. These obligations could also be unwelcome in cases where, though geographically close, emotional closeness is not evident.

4.4 A Gift to One's Partner

4.4.1 A Gift to One's Partner: Partner's Desire to Move

In this study, negotiating the timing and decision to move involved partners, adult children and other kin, as well as external contexts including the availability of their housing unit. Older people could

offer the move as a gift in a few ways, either deciding whether to move at all (choosing to move) or when to move (timing). In the next example, Mr. and Mrs. Paul struggled with both of those concerns.

Mr. and Mrs. Paul lived on a farm on the outskirts of town. It was not their first move as they referred to difficult prior move from another state when they left a farm in the town where the family still had ties. Nevertheless, they had been in this town a long time, enjoying the peacefulness that a rural life offered them. They had a home, a barn and farmland, which they partially leased to a farmer. They had four grown children who lived in what Mr. Paul described to me as some of the best cities in the world. They had hopes that one of their children living overseas might consider taking over the property but he did not see that possibility happening soon. That daughter and her husband had built internationally driven careers and they were still engaged in working to send their own kids through college.

I visited their lovely home several times, taking in the quiet that their internal and external surroundings seemed to foster. Their home was furnished simply yet elegantly and they talked about the ways that they loved their home. I soon discovered that Mr. Paul did not wish to move at all. He loved his home. They decided not to sell their home and barn (which housed his workshop) because he intended to go back and work on projects⁴³. He planned to return again and again to the space that he loved.

Mrs. Paul wanted to move because she had faced some health concerns and being over 80 years old, wanted to move for peace of mind. She had identified a retirement community in their town and was excited about the social possibilities as well. She told me that they lived a quiet life unlike other friends of hers were busy volunteering and involved in community activities. She and her husband had lived on a schedule for many years and enjoyed the slowness of their days. She looked forward to having the possibility of friendships in the retirement community as a way to broaden their lives. Overall, she was

⁴³ Several men in the study expressed sadness over giving up tool collections given the effort taken over decades to assemble them. By retaining the workshop, he did not have to go through this process.

excited about the move and in subsequent post-move interviews, she still seemed happy, having started walking with a few neighbors and participating in exercise classes.

1 Mrs. Paul: But, but I think that because, I've, my attitude toward our move was
2 that it was the right thing to do.

3 Tam: Yeah

4 Mrs. Paul: And I, so my, my attitude was always very positive that this is
5 something we can do, this is good for us.

6 Tam: Yeah

7 Mrs. Paul: It's, it is a, and, and when it came, I thought, when it came to the
8 time when were taking down the pictures. And I did that, I was the
9 one that took down the pictures, I was the one that figured out how
10 we were going to, this was going to work, I ya know I was the one
11 that got the movers to come and show them what we're gonna leave
12 and what, and all that. All of these steps were to me, positive. And
13 interesting. And I wasn't looking at it with great nostalgia like oh
14 we're leaving some place we've loved. That, we have loved living
15 there. But the feeling I got when I was taking down these pictures,
16 I was thinking, this house is still beautiful.

17 Tam: Huh.

18 Mrs. Paul: Even without our stuff in it.

19 Tam: Okay.

20 Mrs. Paul: And the, the rooms, the bones of the house, I said this to many
21 people, but the bones of the house are still there for people to love.

Alternatively, Mr. Paul was not excited about the move, and even after the move, he stated in a soft voice that he was "still in transition" (2011). He moved only for his wife, because he wanted her to be set up in case anything should happen to him. He would not want her to be left with the home and

adjacent farm. Interestingly, similar to conversations with other couples, Mr. and Mrs. P presumed that the male partner would die first.⁴⁴ However, if his wife passes away first, he told me that he would move back to their home...*even if he ate scrambled eggs three times a day*⁴⁵ (fieldnotes).

- 1 Mr. Paul: I'm still in transition.
2 Tam: Yeah, it's ha, it must be hard.
3 Mr. Paul: Yeah.
4 Tam: Yeah.
5 Mrs. Paul: I think it's maybe becau--, perhaps would you say (First name of
6 Mr.P) that's because you still have unfinished projects there that
7 you've, you know that, that these are things that he, that were
8 brought from (State) from his dad's, you know that belonged to his
9 dad. That, that you've always, you know you've treasured those
10 things but you feel like they need to be, something needs to be done
11 to them. And we, you know we really did try to, in the back of our
12 minds thinking that we, we need to do this for our children. They,
13 they shouldn't have all these, these things left undecided we, we are
14 the ones that should be, as long we're still thinking people we

⁴⁴ Demographics support their perspective as the life expectancy of males is less than for females, at every stage of older adulthood. According to the Social Security Administration's Actuarial Life Table.

Male

65-year-old = life expectancy of 82

75-year-old = life expectancy of 85

85-year-old = life expectancy of 90

Female

65-year-old = life expectancy of 84

75-year-old = life expectancy of 87

85-year-old = life expectancy of 91

(<http://www.ssa.gov/oact/STATS/table4c6.html>)

⁴⁵ He told me he was not the most talented cook. Gendered roles on cooking are also common among the couples in this study.

15 should be the ones to be deciding what should happen to these
16 things, not leave it to them. So I think there are a lot of things left
17 for you, for you to do there. But, on the other hand it's probably
18 good for me to go back with him too, on this, right now, that isn't,
19 that hasn't become a pattern.

20 Tam: Okay.

21 Mrs. Paul: for us.

While, Mr. Paul is “still in transition,” Mrs. Paul has become very involved in the retirement community. She has joined an informal walking group and attends exercise classes. In the transcript above, she also talks that even post-move, there is still a lot of work to be done at their old home. Mr. Paul continues returning. Later in the conversation, we discuss that there is also the possibility to become too busy in the new retirement community. She says, “I, some years ago I decided I did not want to join things. ...we like the life where we aren't, where we don't have a lot of, um, commitments. Cause we really believe if you join something, um, you should be a part, I mean, be willing to serve.” She also told me that they had had some residents of the retirement community over to their home. Then Mrs. Paul brought up another couple later in the conversation.

1 Mrs. Paul: But I thought it was interesting that the (Last Name)s was
2 just, was just the other way around for them. She didn't want to
3 move, because the home they lived in (Name of Town) was a home
4 that they had built especially for retirement. On a lake and their
5 children and grandchildren could come and they just, they had
6 wonderful memories associated with that place. But, ah, but the,
7 but Mr. Keith wanted, he was more interested in moving. And they

8 really were quite charmed by the by (unclear) she too thought it was
9 a very charming, ah, setting. Well then when she, after she got
10 here, what she told me was that is that she, ah, they went home,
11 back home to (Name of Town) and she went to their house and she
12 said, ‘I sat down on the hearth in the living room and I thought, No,
13 I’m glad we’re now at the (Name of Retirement Community).’ I’m,
14 she was able to ah, get a sense that this they had done the right
15 thing. So, I think maybe, it just, take you some time to, I don’t
16 know do you feel like we’ve done the right thing?
17 Mr. Paul: I hope so.

Mrs. Paul remarks about the Keiths that they had owned a beautiful home that they loved. She also noted that Mr. Keith wanted to move, instead of Mrs. Keith, and that it was the “other way around for them” (line 2). In talking about them, she is also talking about she and her husband. She says that Mrs. Keiths was able to say, after being in that actual space, that she was happy she was at the retirement community. Mrs. Paul then poses it in moral terms, “I’m, she was able to ah, get a sense that this they had done the right thing” (lines 14-5). Mrs. Paul switches here from “I’m” to “she” to then refer again to Mrs. Keith’s experience rather than her own. However, in the subsequent line, she says, “So, I think maybe, it just, take you some time to, I don’t know do you feel like we’ve done the right thing?” (line 15-16). In this case, she is now addressing her husband using an authoritative assessment “I think, maybe, it just, take you some time to...”, leaving one phrase, “take you some time to” speaking about his possible adjustment, perhaps. Yet she avoids that word and instead switches to a question approach. Her question asks him, using “you” about whether “we’ve” made a correct choice; the switch from first person to the couple as the unit of analysis is striking. Especially since he really did not want them to move at all. He answers with “I hope so,” an ambivalent statement analogous to his first declaration, “still adjusting.”

Mr. and Mrs. Paul also struggled with the timeline of the move, because she wanted to move in the fall, but he wanted to move the following summer. They split the difference by moving in February.

Since they decided to rent and not to sell, the couple had the additional burden of preparing their home (excluding the barn) for rental. Thus, they worked steadily on preparing their home for the move by showing me their deaccumulation progress each time I visited. All the while, they both held the heavy realization that one partner was reluctant to move from his beloved home. Out of love for his wife, he would do so. Therefore, his participation in the preparations for moving, and the move itself was a gift to his wife.

However, gifts are also dangerous. The danger in this case may be in how, in the long-term, a move motivated by love for his wife may affect Mr. Paul's own well being and happiness. Maintenance-free living is an adjustment for someone who has lived and worked on a farm. Mr. Paul actively keeps his barn so that he can work on projects, which now requires him to drive back and forth from the retirement community to access the space. The relationship between Mr. and Mrs. Paul may also be affected if the desire to move continues to be viewed as Mrs. Paul's suggestion. Will Mrs. Paul find an "equivalent" gift to reciprocate? What would be an equivalent gift to moving from the home one loves? Thus, the impact of moving as a gift to a partner brings as much uncertainty as benefit.

4.4.2 A Gift to One's Partner: Honor Partner

Moving can also be gift to a partner posthumously. In this case, it is not about preparing a partner for a life beyond the other's, but rather paying clear attention to the legacy left. Legacies can be in terms of reputation and material wealth. When I met Mrs. Ash, I soon realized that the way she would honor her husband would include her diligence in dispersing the possessions that they had accumulated over a lifetime together.

The entire family was involved in making sure the possessions in the home were settled before her move could take place. These possessions included collections of books in German, Spanish, French, English and Hebrew, cartoons and newspapers of Nazi propaganda, rare maps, figurines collected in

various trips to Mexico and South America and wax seals of European political leaders. Mrs. Ash was a Holocaust survivor and recounted to me how she jumped out of her window when the Nazis came and took her parents and brother away to their deaths in the concentration camp. In her basement hung a painting that the Nazis had slashed with knives which she and her daughter planned to donate it to a Holocaust museum.

Photo 4.3 – Painting Slashed by Nazis



Mrs. Ash's husband passed away after a four-year battle with Alzheimer's and Mrs. Ash viewed the settling of these possessions as a way to care for the man who had assembled the collections over his lifetime. For Mrs. Ash, actively working on moving meant making repeated lists of possessions, arranging visits by auction house representatives to decide which auction house would handle the collections, and inviting university collections specialists to purchase objects for teaching and research purposes. I was able to participate in many of these meetings, and observed the care that Mrs. Ash took in the process.

During most of these meetings, her emotional approach was task-oriented and business-like. Mrs. Ash told me that Mr. Ash's secretary always remarked about his "belt and suspenders" approach to business where he made doubly sure to check on his accounts and papers. Mr. Ash had multiple copies of many of the documents in the house and I spent some time helping her sort through which documents were duplicates and which were originals. One bedroom in the house was devoted to the paperwork of Mr. Ash. She would always have a work plan for me when I came and would often serve me ice cream as we were pouring through her paperwork.

In the moving process, Mrs. Ash used the same "belt and suspenders approach" to managing her affairs. She had already decided what items would remain in the family as gifts to children or grandchildren. Since her preoccupation was in getting a fair price for their remaining collection,⁴⁶ she interacted with many professionals during her own moving process. For example, she was liaising with both a nationally recognized auction house as well as local antiques dealers.

In *The Protestant Ethic*, Max Weber argues, "the idea of a person's duty to maintain possessions entrusted to him, to which he subordinates himself as a dutiful steward or even as a 'machine for producing wealth,' lies upon his life with chilling seriousness. And as one's possessions become more

⁴⁶ In March 2012, I spoke with one of the university collections specialists who worked with Mr. and Mrs. Ash for over 20 years. He also agreed that Mrs. Ash's concern was to generate money to circulating the objects on the market. He also agreed that she had little concern with disassembling collections as objects went to different owners.

valuable, the more burdensome becomes the feeling of responsibility...” (1946/2002, p. 115). Mrs. Ash undertook the task of moving with this “chilling seriousness” even waking in the early hours of the morning to continue shuffling through the paperwork. Her move took a long time to plan (From February 2009 to November 2010) and a lot of work.

When I met her son, he told me that he wished she had moved sooner. In fact, he wished that his parents had moved together before his father had become so ill. Since they did not move earlier, when Mr. Ash fell ill, Mrs. Ash became engrossed in caregiving and could not simultaneously focus on moving. Given the diligence of Mrs. Ash’s moving process, I assert that she could not have moved with the same methodical approach while caring for her husband.⁴⁷

While Mrs. Ash’s diligence helped with the divestiture of her possessions to honor her husband, the gift made was not without a price. She was physically exhausted and emotionally stressed as she organized his possessions. She gave up exercise until the work of honoring her husband could be completed. Also, she gave up several social engagements to focus on her move. She also made this gift to a partner who was dead and not able to acknowledge or reciprocate her gift.

4.5 A Gift to One’s Kin

4.5.1 A Gift to One’s Kin: Peace of Mind

I shall now focus on the ways moving can be viewed as a gift to one’s kin. Considering ways that moves can be both present and future gifts provides the opportunity to understand why older people may not want to move, but undertake one for the emotional and logistical needs of their kin. Mrs. Ash loved her home, and even while she was stripping the home of its possessions through selling and donating, she

⁴⁷ As I never met Mr. Ash, I cannot suggest how moving as a couple may or may not have been structured differently, either emotionally or logistically.

paid meticulous attention to her home maintenance. In fact, one day when I drove up, she was negotiating with someone about the cost of mowing her lawn, telling me that she needed to get a good price for the service. She was concerned both about her home's exterior condition and the safety of her property. She addressed her needs by having her lawn raked, trees trimmed to not obscure views and in the winter, driveway plowed and walkways cleared of snow.

Kin, in addition to older adults themselves as mentioned above, discussed the seasonality of housing. Mrs. Ash's daughter, Karen, was deeply concerned about her mother in the winter. She encouraged her mother to leave before the winter season fell. Given the scope of work discussed above to get out of her house, Mrs. Ash wanted to stay one last winter in her home of fifty years.

Mrs. Ash made a pact with her daughter to be safe when getting the mail every day in the winter season. Mrs. Ash lived on a corner house with the driveway situated on the side of her house while her mailbox faced the street. To comfort her daughter living out of state, Mrs. Ash promised that to prevent falls, she would drive to the mailbox, rather than walk on her driveway, to get the mail.

Some older adults in this study do not have adult children or partners; they involve other relatives or kin in the move.⁴⁸ One night I was having dinner at a Chinese restaurant with three nieces who came in to help with their aunt's, Mrs. Sand, move.⁴⁹

⁴⁸ Here I use kin, as I did in the research design, according to Janet Carsten's definition of relatedness. I also draw on John Borneman's work where closeness has clearly been created and sustained among non-biologically linked individuals. In "Caring and being cared for: displacing marriage, kinship, gender and sexuality," Borneman (1997) traces an adoption case in Germany of a 55 year old man wanted to adopt a 35 year old son. Since the younger man's own father was dead, but the younger man's mother was still living, she had to agree to the adoption. In the end, the adoption was approved by a judge who first had to ascertain that this relationship was not sexual in nature. In this process a legal relationship is established through "the subordination of the principle of ... descent to relation of care" (1997, p. 578). He argues for relations of care to be viewed as another way to conceptualize kinship.

1 Tam: So I have to ask you guys, and I ask everyone this, but um what do
2 you think this move will mean to your aunt?
3 Niece 1:⁵⁰ I think it'll be great.
4 Niece 2: It'll make her life much easier.
5 Niece 1: To be on one level
6 Tam: Okay
7 Unclear To not have to worry that you'll you know fall. To have the garage
8 right attached to the house. To be able to get in the car and go. To
9 not worry about who's going to mow the lawn or who's going to
10 shovel snow and all that I think that'll be great.
11 Tam: Okay
12 Unclear And you know to just have other people around.
13 Unclear I think--It'll be a relief for you. For all those reasons.
14 Tam: Okay, a lot of people have told me that.
15 Mrs. Sand: and it'll make the next move easier you know when I can't live
16 there anymore for health reasons.
17 Tam: It's sort of a plan you know a plan and a safety net.
18 Mrs. Sand: Well I go to the [Name of Retirement Community] home.
19 Tam: Yeah
20 Unclear Ah we figure you'll just live to a hundred and just keel over.
21 Unclear (laughter)
22 Unclear probably at an elder hostel on a zip line.
23 Tam: in Antarctica.
24 Mrs. Sand: I'm going to Alaska—Antarctica.
25 Tam: Yeah you told me. I was telling her it's your post move reward.
26 Unclear I think its even going to make traveling easier because you won't
27 have to worry about the house.
28 Mrs. Sand: That's right.

⁵⁰ In this recording, at times, it is difficult to distinguish between the voices of the nieces present.

In this conversation, one niece points out all the logistical benefits that Mrs. Sand will enjoy in her new home while also emphasizing that a new housing location will also facilitate her travel interests. The move will also offer peace of mind to her three nieces, the closest of which lives five hours away.

However, gifts also impose obligations. For example, when relatives come to assist with a move, they may not accept the older person's wishes about number and types of possessions. After unpacking her aunt's tea collection, one niece told her aunt that she didn't need to buy more tea. Her aunt, Mrs. Sand, told me that soon after, she went to the store and bought three more boxes. It is uncertain whether they would laugh about this defiance or whether disappointment would ensue on her niece's part. Does Mrs. Sand feel an obligation to her niece because she helped her move? Do contributions such as unpacking the tea boxes give the niece license to tell her aunt that she need not acquire more objects i.e. boxes of tea? Or will her niece be able to see past the tea bag collection to the peace of mind attained for her aunt and for herself in this new environment? The aunt's actions and niece's reactions may extend the temporality created in the act of moving. For years to come, their relationship may involve examining purchases and collections.

4.5.2 A Gift to One's Kin: Freedom

The emotional and logistical involvement of kin in the moving process varied from family to family. Sometimes older adults really made most of the plans and kin were directed to perform certain duties including claiming and taking away objects that were theirs and their parents had been storing or taking objects that would not be recirculated to the new residence of the older adults. In this sense, one could argue that these objects could be welcomed or resisted. Sometimes these objects were taken out of duty, and sometimes out of desire. But as I examined the role of kin in the move, I also saw that older adults' moves affected kin far beyond the material circulation of possessions. Moving could also be an opportunity for kin to benefit in other ways. Moving yielded gifts of a different nature.

Gordon, the adult son of Mr. and Mrs. Keith, would often bring his dog when he came to visit his parents two and a half hours away from his home. One night when I was talking with him after he had

driven over, I asked what his parents move meant to him. This conversation took place in the final month before his parents' move in late fall. He said, "this is done now and I'm done working it." He and his sister had been very involved in the move. His sister, Nancy, would come every other week spending the night Monday through Thursday to help their parents get ready for the move while leaving her husband in their home. She could only come every other week because her step-children lived with them alternate weeks. Their family endured a stressful summer, as Mr. Keith suffered a broken leg, followed by an anxiety disorder that affected the whole moving preparation. Gordon was thankful that the summer was behind them because his parents "nebulous future" seemed more certain. Completing the move would be welcome by all. Gordon clarified, "It's a weight off of my shoulder...well, because first of all, having to come out this way...I'm glad that I'm available to do it. I'm really, I'm grateful for that. But I would like to be free of having to do that. Now I can launch into a new life." He further clarified that "I can move away now" and that he'd always wanted to live in a different part of the country. Here we see a family deeply involved in the moving process, and yet also family members felt that the move is a gift to them.

With the gift of moving has come much expectation that the adult children will become involved in significant packing and unpacking chores related to the move. The move to within two miles of their daughter has created the potential for an imbalance of responsibility on adult children. Over time, their daughter may feel the need to reciprocate her parents' gift of moving in other ways, such as providing transportation for shopping or medical visits. With seven children, their daughter has other responsibilities that she will have to balance with her obligations to her parents. Gordon faces the possibility of moving himself, yet with his parents now 45 minutes away from him, it is uncertain whether he will still feel free to move away as his parents age. Though their housing provides a less demanding environment with supports in place, if his parents experience changes in their health status, he may not feel the same freedom expressed during the moving period.

4.5.3 A Gift to One's Kin: Ease of Caregiving

I opened this chapter with Mr. and Mrs. Lewis on moving day. Mr. Lewis explained later in our conversation that the previous moving experiences of older persons in their family, as well as their experience with moving their own family 27 times mentioned in Chapter 2, affected their housing transition. Please see the transcript below.

- 1 Mr. Lewis: The move is a philosophical move.
2 Tam: Okay.
3 Mr. Lewis: It's a philosophical move to basically, uh, two, two major objectives.
4 To, to be help and assistance to our to our kids and grandkids and
5 number two to make it so that our kids didn't have to go out to
6 (location) in the middle of nowhere and pick up the pieces. And, if
7 Tam: Okay.
8 Mr. Lewis: you're going to move in your seventies when you're still moveable
9 Tam: Uh huh.
10 Mr. Lewis: and you can still make friends and you can still live under your own
11 system. We took my grandmother away from her home in
12 (location).
13 Mrs. Lewis: Where all of her friends were
14 Mr. Lewis: Her friends, her house, her things,
15 Tam: Uh huh
16 Mr. Lewis and it was, it was, oh god it was...(begins to get upset).
17 Mrs. Lewis: Brought her to (place) and she stayed with his parents until she
18 died.

Here, Mr. Lewis he asserts that he is moving to circumvent his children's possible emotional and logistical need to move to them in order to care for them should they need more support. Secondly, they

would not have to “pick up the pieces” because by living locally, they will know each other’s homes, and lives more in-depth rather than have a periodic experience with the older persons’ material and social world. Lastly, he asserts that by moving at a younger age (he and his wife moved in their early 70s), the couple would have opportunity to establish social connections in their new community.

In this transcript, he alludes to his grandmother’s experience of moving-in with his parents and his own caregiving experience of moving back to the town where his mother and his wife’s mother were both in a nursing home. For the latter, this relocation entailed caring for their mothers and disposing of their estates, placing their own lives and dreams essentially on hold.

David Eckert (2006) asserts that moves become family lore. This is a case where decisions are made based on experience and narratives. The retelling of the ways ancestors’ age becomes a script to inform their own decisions. However the telling and retelling of stories may change their content and intent. Underlying the content of a story may be a moral message, that moving is a way to express one’s love. Or that putting one’s life on hold shows the ultimate love for a parent. These narratives will be subject to interpretation over time. It is possible that moving as a gift may take a different tone especially because a generation ago, Mr. and Mrs. Lewis, then the caregivers, moved themselves rather than having their mothers move and leave everything they knew behind.

4.6 Application of Theoretical Frameworks

The SOC model applies here in several ways. First of all, there are examples of the ways that living in a less demanding environment can decrease the loss of one’s reserves in older adulthood. In less physically navigable spaces, tasks such as laundering clothes and climbing stairs take physical energy to complete. So, after moving to a less demanding environment, one’s physical reserves may not be as depleted. Additionally, the less demanding environment is a direct contrast to a place where one experiences seasonal isolation that decreases social contact and increases fear of falls and injuries.

Additionally, living in a less demanding environment frees people from worry and time that was previously devoted to home maintenance. In that way, they can participate in exercise classes or travel.

However, even after moving to less demanding environments, older adults in this study watched over the physical spaces, neighbors and family members. Some may have felt that they needed to do more work around their new homes and looked for projects with which to become involved. Their moves, actually, may have freed them to have more of a gaze on their surroundings than when they had their former homes. Their vigilance continues to this day.⁵¹

Another way the SOC model applies to the concept of the gift has to do with the complicated emotions involved in moving for those who in moving are giving gifts to their partners. In the case of Mrs. Ash, she chose to honor her husband's legacy, but in reality, to achieve her move, she depleted some emotional and physical reserves as she struggled to get fair prices for many of his beloved objects. In the case of Mr. and Mrs. Paul, moving for another, though he did not want to move himself, may deplete Mr. Paul's well being while his wife's happiness is evident.

In terms of kin, the peace of mind and freedom felt by kin after an older adult's move may optimize the emotional reserves of the adult child. However, moving may come with unforeseen challenges such as the responsibility felt when a parent moves close to an adult child and leaves his or her social network. The adult child may feel responsible for the parent's well being and happiness and may make adjustments in his or her own life to address the parent's needs. Moreover, after a parent moves near an adult child, the adult child may prefer to or need to relocate.

⁵¹ In a recent visit to one of the retirement communities (March 2012), the retirement community had taken in six families who had lost their homes due to a natural disaster. Several older adults remarked at enjoying seeing a school bus navigate the streets of the retirement community.

4.6.1 Relationship to Gift-giving

Moving as a gift is a complex lens. This chapter documents only the first of a series of gift-giving processes between older adults and future selves, between partners in older adult couples, and between older adults and their children. All gifts are potentially dangerous. For example, Mrs. Sand may have moved her possessions, but may not have addressed challenges of how to manage her possessions. Mr. Paul may or may not adjust well to leaving his beloved home. Also, peace of mind for kin comes at a high financial price in the current long-term care landscape in the U.S., where inheritances may be diminished to pay for this peace of mind. For the older adult, the loss of one's former community may be substantial if the move was far.

4.7 Conclusion: Moves of older adults

Through the examples above, I show that moving can be a gift to oneself as well as to partners and other kin. The entire process of moving becomes the gesture rather than a gesture of a single object or set(s) of objects. The challenge is to view the move as a gift writ large, rather than in the detail. This project was originally conceived as contributing to the household disbandment literature, but in this chapter, I've shown that the individual possessions do not solely comprise the gift. Since this is also a gift about new spaces, relationships and patterns of interactions may be transformed as some kin are visited more often, and others less.

Moving is one of many experiences in the ongoing relationships between older adults and their kin. Moving, with its varied contexts of old and new spaces, requires negotiation of spaces and relationships. The interpretation of moving as a gift requires that giver and receiver remain intertwined long after the physical move is accomplished, extending temporalities in unforeseen ways.

Chapter Five

Moving as an Imagined Future

"Every entry into the sphere of meaning is accomplished only through the gates of the chronotope."

Mikhail Bakhtin, p. 258

5.1 Introduction

When considering the idea that moving is a gift, complexities arise. In chapters five and six, I argue that other orientations, like time and anxiety, become intertwined in the gifting process. For this chapter, I examine how extensions of temporality intertwine with commodification processes when considering a move as a gift. Often homes are one of the largest commodities that Americans buy and sell. 66.4% of Americans are homeowners, and when broken down by region, in early 2012 home ownership in the Midwest was 69.5% (Bureau of the Census, 2012). Without the emotional and physical work of examining moving in terms of the selection of commoditized goods, the gift of moving cannot be completed.

As discussed in chapter four, moving for older adults can be seen as a gift giving process that involves gifts to both a future self and other people. However, moving can also be seen as

an engagement with commodities, in this case, senior housing units. This chapter shows how senior housing units operate and “circulate,” in Appadurai’s terms, in a world of commodities. Dwellings are bought and sold in this study. Additionally, dwellings may be rented rather than owned, a common option in the senior housing industry.

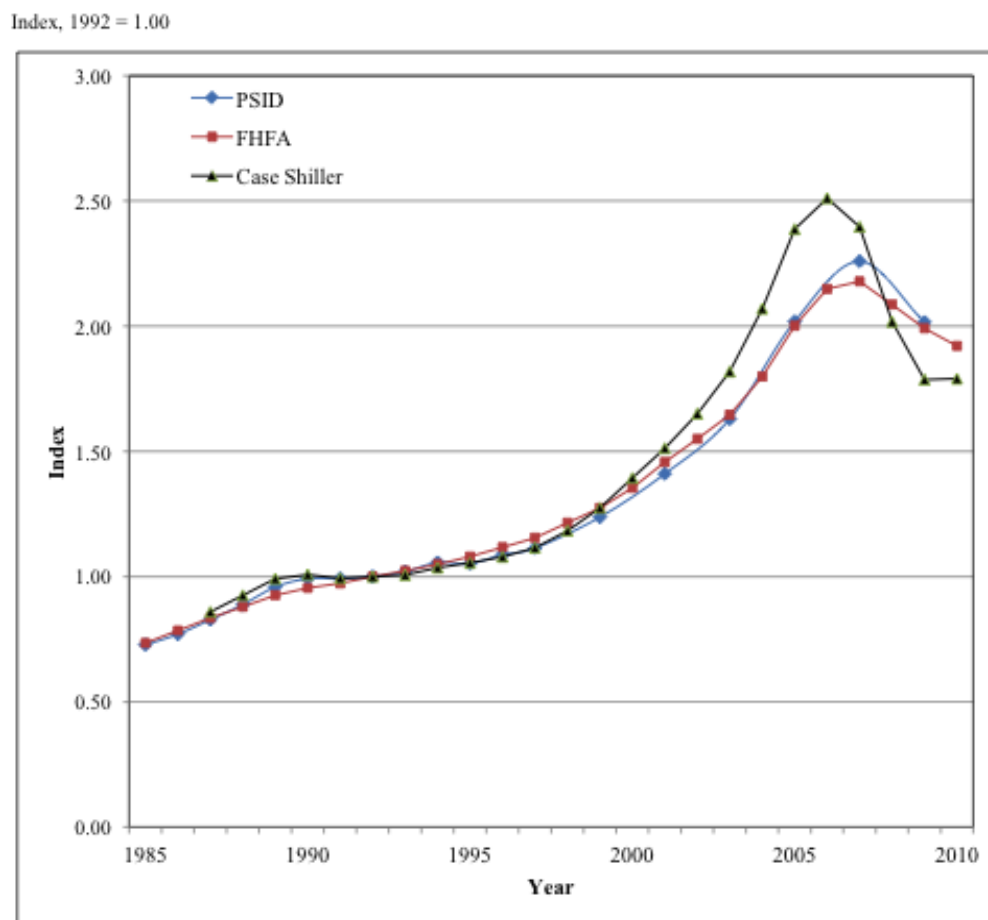
Yet homes, being fixed yet modifiable physical entities, also ground inhabitants in a particular residence located in a specific community. Sometimes, older adults who anticipated selling their homes to relocate found that their estimated housing values had changed drastically in the study period. The Center for Retirement Research at Boston College statistically confirms this feeling participants expressed. By analyzing six waves of the Panel Study of Income Dynamics data¹, they estimate that the net house value of early baby boomers² has decreased by 23.4% (Bosworth, 2012).

In figure 5.1 on the next page, we see the trend of home price changes from 1985-2009.

¹ Bosworth suggests that PSID is particularly useful because it tracks home ownership of individual households over time (2012, 8).

² Defined as household with a member of a household born between 1948-1953. Future studies on housing values for a range of older adults, including those in their 70s and 80s, would also complement these data.

Figure 5.1—Estimated Home Values of Study Participants



Sources: Federal Housing Finance Agency, Standard and Poors, and the Panel Study of Income Dynamics. The PSID estimates are estimated as the percent change in the mean home price of households who owned their home and did not move between two adjacent survey waves.

Table 5.1 — Values of the Homes of the Participants in this Study³

What was the value of the home/condo you sold (if you sold your home/condo) or expected value if you planned to sell?		
Housing Value	Number	Percentage
<\$100,000	0	0%
\$100,000 - \$199,999	8	28%
\$200,000 - \$299,999	6	21%
\$300,000 - \$399,999	7	24%
\$400,000 - \$499,999	2	7%
\$500,000 - \$599,999	5	17%
\$600,000 - \$699,999	0	0%
\$700,000 - \$799,999	0	0%
\$800,000 - \$899,999	1	3%
\$900,000 - \$999,999	0	0%
>\$1,000,000	0	0%

There has been widespread impact on the housing market on many regions of the country. In Manning’s analysis of the foreclosure crisis, he writes, “Historic forces culminated in a historically unprecedented wave of home foreclosures and precipitous residential price declines. Currently, almost everyone involved in the purchase, sale, or finance of a house is experiencing economic pain” (p. 31). Scholars are still trying to understand the causes and impact on the housing market. Intricately linked, those who are trying to sell find that their largest assets, their homes, are in competition with the number of foreclosed homes. This context contributes to depressed housing values in these same communities (2008, p. 20). The foreclosures are often seen as a result of subprime mortgage mismanagement that Financial

³ In this graph, some participants either declined answering or were not able to be contacted to find out this information in a follow-up survey conducted in Spring, 2012.

Crisis Inquiry Commission has called “avoidable” (2011, p. xvii). It is estimated that 40.6 million homes in the United States will lose “value” because of the subprime foreclosures, leading to a loss of \$356 billion in home values.⁴ On a local level, for nonprime mortgages in Michigan, 27 percent were a result of a “completed foreclosure process” as opposed to 15.4 percent nationally (Cook et al., 2010).

For older adults in the study, some were rethinking home ownership. Several worried about the sale of their home, and as we will see in Chapter six, some did not complete their moves due to inability to sell their homes. With the complications of the housing market, I found a lot of worry about selling a home or condominium. Nevertheless, I also found that older persons think about their dwellings as more than just a place to be sold and bought, or rented. Many older adults were also preoccupied with personalizing their new spaces. I argue that personalization of one’s new space is a way to socially say, “I will be here for a long time.” This attention to detail and style I witness in the older adults in my study described in the next section.

5.2 Philosophy Behind Personalizing a House: Make it One’s Home

Several authors have discussed the appropriation of commodities in creative ways. Foster (2005) argues that Karl Marx in his study of commodities did not consider other ways value is enhanced because consumers work to change meanings of commodities. For example, through marketing practices, products are marketed to appeal to the individual tastes and life course of consumers. Using “lovemarks” as a term for personalization, Foster suggests, “Creating lovemarks therefore entails inserting products into stories that shape people’s relationships” (p. 11). In addition to tailoring products to fit the narratives that people tell about

⁴ The Pew Foundation’s (2008) report estimates that one in 33 present homeowners in the U.S. will face foreclosure due to a subprime loan issued in 2005 and 2006.

themselves, Fehervary (2009) also suggests looking for examples of appropriation before consumption. For example, through marketing to target audiences so products seem “made for me” (p. 447). On the other hand, she suggests that some commodities are not subject to appropriation because they are strongly tagged as prestige brands. A Louis Vuitton purse owner can only “borrow” the brand’s symbolic meaning, but can never fully see it as hers (FN 15, also 14). In contrast, in the senior housing, marketing directors encourage appropriation, often termed “personalization,” before and after moving in. They want potential residents to see that the housing is appropriate for their stage of life and that a particular retirement community can be “made for me.”

In “The Rituals of Christmas Giving,” James Carrier provides an example of creative use value in describing the “wrapping rule” of gift giving. If gifts are impersonal, which for him means manufactured commercially, wrapping is a way to personalize the gift. However, if a gift is homemade, like jam, wrapping is not considered necessary. By personalizing the impersonal gift, the gift givers are creating use value.⁵ In the case of senior housing, personalization can also be seen as a way to individualize identical spaces.

Personalization may also be an example of the social life of objects where objects ebb and flow in commoditized milieus (Appadurai, 1986; Kopytoff, 1986). Building on Simmel’s argument that value creation need not be linked with production of objects⁶, Appadurai argues

⁵ Carrier also says that persons also appropriate their items after purchase. For example, Carrier provides the example of transforming raw vegetables (commodities) into a cooked meal (p. 62).

⁶ Georg Simmel offered a contradiction to Marx’s assertion that value should be calculated according to production processes. He states, “We invest economic objects with a quantity of value as if it were an inherent quality and then hand them over to the process of exchange. On the contrary, he suggests that value is created at the moment of exchange. Prior to exchange, an individual may desire an object, which may not be available. Simmel argues that the divide between “desire” and “enjoyment” of an object forms the basis of value for an individual (1978, p. 66). However, value is only established interpersonally. For example, in bargaining over an object, the interlocutors are really discussing the sacrifice that is to be made by the seller in giving up the enjoyment of his/her object (p. 80).

for a different understanding of objects. Appadurai (1986) suggests that Marx's association of commodities with exchange, mediated through monetary exchange, should be conceptualized as a phase in the social biography of an object. His interest is the circulations that objects take when they are exchanged for money and are incorporated into a different "regime of value" (Appadurai, 1986, p. 15). Igor Kopytoff also emphasizes the commodity as a phase in the same volume. Appadurai endorses Kopytoff's views that there is a tension in the histories of objects between becoming a commodity (something "common" and thus exchangeable, Kopytoff, 1986, p. 69) and becoming its opposite--singular. Singularity does not have to be equated with preciousness, as objects can be singularly "priceless" or "worthless" (p. 75). The personalization processes described below show that there is a pre-move stage where singularity is possible and that in the history of the commodity of that housing unit, much can be altered. Kopytoff takes on the challenge of understanding contexts that will, in Appadurai's phrasing, "help link the commodity candidacy of a thing to the commodity phase of its career" (p. 15). I suggest that the pre-move stage is a context that supports such a "candidacy" considering the great efforts and time that older adults go through to ensure their modification requests.

Embedded in the pursuit of distinction discussed earlier are "politics of knowledge" (Foster, 2005). Foster (2005) argues that value is created unequally through what he terms a "politics of knowledge."⁷ The "politics of knowledge" creates asymmetry for those who are also working to customize spaces. Building on the role of the social landscape of consumers and producers, knowledge about possible modifications and knowledge about what is permissible by marketing staff differs. While personalization is another a way to wrap a commodity as a gift to

⁷ Foster argues that some are more knowledgeable about commodity flows around the world. In addition to inequity of information, some challenges ahead may be disputes over intellectual property rights and rights over land and other natural resources.

a future self, the ability to imagine and execute such modifications depends on one's expertise and personality.

As adults age, they work hard to extend the time left in their lives. In the world of moving, this means extending the time that they will stay in their new spaces. Whether or not they realize the financial implication of this plan, the literature shows that the preference to remain in one's living space is often a less costly option than leaving it for a higher level of care. Numerous communities have established programs to help older adults age in place or remain in their homes (Oswald et al., 2010; Vasunilashorn, 2012). Moreover, there are state and federal incentives to supporting older adults in their communities. Given this backdrop, I argue that the emotional and physical work entailed to project a future after a move can be employed by older adults, kin and professionals as a way to counterbalance individual and societal preferences for remaining at home. One way study participants imagined a future was to focus on the personalizing of spaces. I argue that the work of extending space-time (or the linking of space and time) occurs for older adults as the senior housing options are commodified.

5.3 Moving as a Time to Project Future Self

Moving is a time when older adults project a future self to explore what their lives will be like in a new housing environment. They explore this in three ways: emotional projection, physical projection and financial projection.

5.3.1 Emotional Projection

Emotional projection includes understanding where they want to be geographically as well as who they want to be around. This may include their existing community and/or their kin.

First, as older adults plan moves, they consider where their kin live and whether living near them is a priority. I met several older adults (both single adults and couples) who chose to live in their hometown though none of their adult children or nieces and nephews lived nearby. Emotionally, these older adults projected a future self that would include living in a town they loved.

Researchers are also finding that older Americans embrace retiring to college towns (Groger and Kinney, 2006). With about 65,000 older adults (ages 55+) in Washtenaw County (Blueprint for Aging, 2009), Ann Arbor is often viewed as a desirable place to retire.

People moved locally for various reasons and in different ways. I remember a conversation with Mr. Paul at his home. He told me that his four children lived in wonderful places in the world, but that he was not moving to any of them. He, and several others in my study, chose to remain in or near Ann Arbor despite acknowledging that they had no kin in the area. Some people remained in the area to be close to kin already residing nearby. Others weighed the geographical options of living near different children. In another case, one couple had a daughter whose husband had difficulty with his employment during the economic downturn. They said that they could not really consider moving there to be near their daughter and four grandchildren because that family might have to relocate for employment. They remained in the area near their son.⁸

For some, living only with other seniors was anticipated with a sense of dread, especially foreshadowing frailties to come. For others, living in their current community had isolated them. One man, Ron Chaney, hoped to have a fuller life by finding a group of men with whom to spend time, rather than having neighbors with small kids whose concern was getting their kids to the bus stop on time. He told me that he had custom built his house about ten years ago in his mid-

⁸ In this family's case, they had children and they chose to discuss the move with their son and his wife last. They reasoned that that they would rather not have news circulate about their moving decision locally.

50s, and thought others moving to the area would have had to save up a lot to afford living there, thus they would be closer to his age. Yet, he found that many young families with two high-income earners moved there. While they were nice, he never felt deep connections with his neighbors.

5.3.2 Health Projection

This feeds into the second component of future projection, the need to project one's future health status and health care needs. In some ways, this projection also requires that older adults understand the landscape of "systems of care" that are available and accessible. This requires imagining whether they should try to choose a place that offers a continuum of care or a place that suits their current health and mobility status. One of the retirement communities I visited in my study addressed these concerns by building the independent living community not in the same place as the assisted living or skilled nursing facility⁹. Those who live in the independent living community are well and fairly mobile, so they do not have to interact on a daily basis with those who are not. By purchasing a place there, they are also buying into a continuum of care available a few miles down the road, which provides a source of comfort for the residents. They are integrated into the care system, but they can dine and socialize with fairly well seniors.

5.3.3 Financial Projection

Lastly, older adults must project their financial status in the future. For some, this type of projection probably begins decades before a move, as employment status and work history all

⁹ The transitions between levels of care are not always agreed upon. Shippee (2000) points out the uncertainty of who will decide on a transition (residents, relatives, staff) as well as what would trigger a decision is still fairly unknown by many residents of CCRCs.

play into this. But, as this study started in the uncertain economic times of January 2009, older adults in my study needed to account for costs of long-term care and their depleted assets, and needed to carefully consider whether they could sell their houses, and if so, when they should. They frequently found that previous financial preparations had evaporated. In fact, some senior living communities reacted by providing financial seminars and decision-making support to future residents. They also permitted a delay in the full deposit usually required to move in. This gesture acknowledges that many seniors cannot easily relinquish 100,000 to 300,000 dollars without applying the equity obtained from the sale of a primary residence.

5.4 Imagined Future: Personalizing Spaces as a Gift to Oneself

As discussed in the previous chapter, older adults chose to move as a gift to themselves for three reasons: 1) ease of navigating spaces, 2) freedom from home maintenance and 3) enjoying the fruits of their labor. Many study participants became preoccupied with modifications in their new residences. For some older adults, the iterative process of choosing to move, choosing a retirement community, choosing a specific residence within a community and examining potential modifications within a residence cannot be overstated. Anticipating many conversations about loss of leaving one's home, I was surprised by the number of conversations about countertop and cabinet colors as well as other discussions of adding patios and sunrooms. As I was trying to understand the emphasis on modifications, which for some overshadowed the overwhelming feelings of the amount of labor required to get out of the original home, I came to realize that the personalization aspect was part of a larger question, namely, do I see this space as my next home? I argue that the attention to personalizing of spaces through itemized

modifications contributed to the work of imagining a future in the new residence, in essence a gift of time.

The linking of time with space has been termed “chronotope” (Bahktin, 1981). In analyzing narratives in differing genres of novels, Mikhail Bahktin differentiates between narratives where characters age and narratives where characters do not age. For the latter, Greek romance, “this empty time leaves no trace anywhere, no indications of its passing” (p. 94). On the other hand, another style of novel, termed “adventure novel of everyday life,” tracks different changes in an individual’s life, with the possibility for metamorphosis (p. 113). This type of novel “fuses the course of an individual’s life [at its major turning points] with his actual spatial course, or road---that is, with his wanderings” (p. 120). In this project, chronotopes or “the intrinsic connectedness of temporal and spatial relationships” (p. 84) occur when older adults see themselves in new spaces and also see themselves as living in the spaces in the present as well as the future. Space and time are fused particularly through the work of personalization. In turn, this deliberate work of personalization makes the idea of moving seem more attractive and achievable.

5.4.1 Porous Definitions

In my fieldwork, modifications to senior residences took many forms and had different purposes and consequences. “Modifications” included choosing paint color, changing fixtures, and adding upgrades such as stainless steel appliances, while other modifications were glossed as “special requests,” which might be seen as ways to customize space by changing the footprint of a residence, like having an entrance to a storage closet through a bedroom closet rather than the standard way of having the entrance attached to the garage.

As I was trying to understand modifications as either an upgrade or a “special request,” I soon learned the subtle distinction. “Modifications” would be seen as adding value to the property and would be left in place for future residents of that unit, while a “special request” may or may not have to be modified back to the standard design in efforts to refurbish the place for a new tenant. Thus, the upgrades and special requests invoked an implicit understanding of what is considered standard.

While the units in the retirement community were not being marketed as customizable, professionals encouraged movers to personalize their space. One marketing director recounted to me, “if you say customization to people, it gives them free reign, okay, I want to move that wall...its much more than what I call personalization, superficial things like crown molding, change in blinds, different kinds of tile...its interior space, nothing structural, that gives them the opportunity to express themselves” (*italics added*). Personalization was also a way to build excitement about their moves, something that might counteract feelings of loss and being overwhelmed. In the marketing office of one retirement community, there was a board displaying options for colors of granite countertops and cabinet finishes. This display and discussions about it worked to help future residents imagine a place that was personalized to their tastes.

Photo 5.1 – Display from Marketing Office Displaying Personalization Options



However, after viewing the community, a local architect cautioned me that one could also see the limitations of personalizing space. She explained that moving into a retirement community or condominium, one is also aware that one cannot make major changes to an exterior space. For example, one can never add an addition, or even a window.

For many movers, additions or changing the footprint of the space would never be requests that they would make. Neither would putting a screen door on their front door. In many ways, personalization comes with a cost. Ceiling fans and specialized door swings had set prices and sometimes the difference between an upgrade and a special request would come into play. According to a senior manager of the retirement community, upgrades cost money but they were seen to add value to the space, while special requests, might have to be taken out to be replaced for future residents. Therefore, the cost of removing and replacing such requests (like specialized door swings or specialized doors) was added into the pricing. Another marketing

director explained that people expect more amenities now that they are living longer. Some movers found the spaces to be equipped with appliances more modern than they had ever lived with before. One couple in the study did not have central heat in their previous residence. Others had lived without garbage disposals, microwaves and icemakers.

Modifications could achieve multiple purposes for older adults, such as the promotion of choice, compensation for present or future physical challenges or the promotion of function and safety. These modifications also worked on a social level to signal to retirement community staff and other residents that certain residents had an expertise about spatial layout. For example, Mrs. Johnson worked for years as an interior designer and previously had a home at which she often held charity fundraisers. In her new residence, she personalized her kitchen with triple crown molding to accompany her cabinet and countertop selection. She also requested a gas stove and hard wood floors throughout her house. Her place became a showpiece for others considering a move. In the photo below, there is triple crown molding added by Mrs. Lincoln to enhance the corners where the walls intersect the ceiling in the kitchen.

Photo 5.2 –Personalized Kitchen in One Senior’s Residence



Retirement community staff, trying to assure the reservation of a unit, also viewed modifications as a way to promote choice and to create excitement about moving to senior living. Residents also worked towards imagining a future where modifications were viewed as gifts to enjoy. Many viewed the living space as their last home, at least the last one for which they would control the design and decoration of the space.

5.4.2 Modifications to Promote Choice

In promoting choice, there is both the sense of control that comes with an ability to make choices as well as the capability to choose between options. One thing I noticed repeatedly was the interest in personalizing spaces by making modifications to their interiors.¹⁰ I had numerous discussions on the choices between three kitchen cabinet colors, colors of granite for the kitchen countertop, colors of paint for the walls and which furnishings residents should bring from their old houses to their new ones. These choices enabled everyone to mark space as their own.

However, discussions about modifications might also signal moving to a place that was unlike what people were both accustomed to and preferred. For some, the granite countertops also made them feel it was “too fancy” for them. One marketing director told me that they had to work with older adults to help them feel they deserved to live in such a nice kitchen. As mentioned in the previous chapter, enjoying the fruits of one’s labor as a gift to oneself was also employed by those encouraging the move, either kin or marketing professionals. During fieldwork, I was also trying to figure out if what mattered to study participants was simply having choices, or specifically choices that signaled a certain socioeconomic lifestyle. Even

¹⁰ The use of interiors is opposed to exterior or structural spaces, but actually some residents were able to modify the latter also. This section focuses on modifications within the residence.

when talking about granite and Corian, no one really wanted to talk about Formica as a viable option.

The feeling that the new residences were too fancy also became part of the discourse. Could this living space be a step down? When I spoke with Mr. and Mrs. Keith about their residence post-move, they did not consider everything offered to be of the highest quality. This was important to explore because the older adults in this study who were already resource-rich were able to consider moves financially. Yet, understanding the preferences and dislikes of movers with a variety of original homes and expertise seemed important in design of living spaces. When I was thinking that the cabinets in the retirement community were top-grade as per many conversations about the excitement of choosing cabinetry to match granite, Mr. Keith pointed out “Well, it’s not high end cabinetry...I would not put this grade cabinet in [my home]...on good cabinetry, it is dovetailed. This [the drawer] is stapled.” Having been to their old home, I noticed the great emphasis they had placed on detail. For example, in each of their bathrooms, they had designed the shape of the bathroom mirror to mimic the shape of their sink (see photo on next page).

Photo 5.3 – Sink and Mirror Shape



Mr. Keith took great pride in showing me the certificate of his father's that identified his father as a master carpenter. In addition, after moving in, Mr. Keith had taken me through the new housing unit showing me places where the molding was not properly finished. Yet, when I asked Mrs. Keith about the cabinets, she said, "It [the cabinet] bothers me...but can I live with

it...absolutely.” For her, and for Mr. Keith, the overall benefit of moving to a retirement community allowed them to accept the place, while still maintaining their voice and expertise in house building.

The amenity most often talked about was granite countertops. Some people felt that the kitchen space would be an upgrade from their own kitchen. A built in dishwasher was an upgrade for the woman who had a portable dishwasher and had to cart it to the sink every night to do her dishes. However, even though the residence boasted new appliances, some things were not standard and this woman left behind a convection oven that could cook a chicken in 20 minutes.

Others felt that if they could completely design the space, they would not choose the available options. In the issue of countertops, several people told me that they would not purchase granite countertops given the choice. They would prefer a solid surface like Corian that many had in their own homes. One participant with Corian also had soap dispensers drilled into the countertop, which she found out would not be possible with granite.

Residents were given a list of options and had much time to be preoccupied about the possibilities. The command of a linguistic register of construction expertise signaled a relationship to homes and spaces where value is placed on ‘the creation of places in our home and yard that provide settings for immersion in the reverie of simply being; places to facilitate heightened awareness and meditation on our place in the cosmos” (Rowles, 2008, p. 133). For some who conceptualized moving to a retirement community as their last house, there may have been unfulfilled spatial and structural desires from previous residences for which they wanted to compensate. Mrs. McGee said that she asked for a six-foot soaking tub because she had always wanted one. She told me that her son was quite impressed with the idea of such a long tub and

intended to use it when he visited. However, in the end, Mrs. McGee did not move because she could not sell her home and never got her six-foot soaking tub. In Chapter Six, I will further address the complications that arise from modifications when moves are not completed.

Others requested great modifications in their housing. By making the request using the terminology or linguistic register of expertise, older adults asserted their wishes. For example, Ms. Grant had many ideas for her new space, including swinging doors that would be half the width of the door entry way, bi-fold doors and lighting tubes that would bring natural lights through to the living room where there were no windows. She engaged multiple times with the construction company owner, not only with her ideas termed “special requests.” Here is an example of meeting notes written by Ms. Grant, which she later provided to me as I was not present at the meeting.

Figure 5.2 -- Modifications Requests

MEETING SUMMARY 5-24-2010 Re: Cottage #27

Present: (names have been changed to position), Retirement Community, Marketing staff (Retirement community), Marketing director (Retirement community), Ms. Grant.)

Purpose: to review the upgrades requested to date and spec out the time frame for future decision points.

We used the "Retirement Community's Cottage Upgrades & Color Selection" and the Nov. communication of Grant Upgrade Considerations as the base documents for discussion, especially with regard to Grant's "special requests".

Kitchen: Lighting above sink is resolved using the current standard.

No holes to be permitted in granite counter top. There will be an effort to salvage a piece of granite from the sink opening to be used as a mobile cutting board surface. (approx. 8 or 9 in. x 12 or 13 in.)

Since our conversation on 5-21, it is clear that I would request that a switch be added so that the undercounted and above window can lights be separated from the operation of the light above the island area.

Living Room: Hannah will check on the cost effectiveness of beveled glass or grill inserts in the thermopane door glass using the material from the CBL Co. The cost of a full screen door on to the patio will also be determined.

I will consider the wisdom of wiring the ceiling fixture now for the future consideration of adding a fan. This cost needs to be determined.

I will determine any added outlets needed for this and all other rooms, promptly.

I will promptly determine if a TV cable and electrical outlet is desirable above the fireplace.

ON 5-31-10 I GOOGLED THE MILLIKEN MILLWORK CATALOGUE. FOUND THERMA TRU PATIO DOORS. FOLLOWED PRICING OPTION. LEARNED THE "PROBABLE" VERSION COSTS \$1500/UNIT. ONE WITH GRILLS COSTS \$1676/UNIT. SCREEN FOR EITHER COSTS \$168. Sent Jill e mail re: this info.

Master Bed Room:

I continue to feel strongly about the door entering the bedroom and the door entering the walk in closet. After consideration, I believe that I would consider storing those two doors and having a split door (two 18" panels replacing the single 36" door) applied to each of the current doors, if a pocket door is considered truly "verboden".

An electrical outlet in the walk in closet is considered "doable", at mid wall height. I will mark the location on the diagram Jane provided.

One wall switch operates the ceiling fixture. A second switch will be needed to operate at least one wall outlet. I will mark the desired location on Jane's diagram.

Baths: No countertop drilling accommodations for soap dispensers.

Master Bath: The addition of a tubular skylight will be priced to be located in the most structurally sensible way in the ceiling between the toilet and lavatory, near the utility room wall.

Guest Bedroom:

I am still not clear on the standard offerings for the closet: Do the "Miscellaneous Selections: Laminated shelves in lieu of wire shelves" apply here? If not, and the only alternative is the "closet upgrade" by Closet Pro, then my original request stands. I will need clarification on this.

I do continue to want to consider the cost effectiveness of a tubular skylight in this room in a location I noted as "area 7" in my 11-09 correspondence. As I study the James' cottage, I will provide more specificity.

Like the living room ceiling fixture, I wish to have priced the electrical wiring for a future ceiling fan installation in this room.

I will promptly determine the need for an added wall outlet, mid wall, to accommodate lighting for a desk/cabinet area. I have yet to identify any other added outlets, but do know that an additional wall switch will be needed to operate at least one outlet as does the switch for the ceiling fixture.

Miscellaneous Selections:

I am still not clear on which shelves specifically qualify as "laminated shelves in lieu of wire shelves", which I have selected @ \$750.

Given Jane's diagram of outlets, it appears that the cable installations are adequate and that there are outlets in the storage area as standard.

As a second part of our conversation, I was led to believe the following "process" expectations:

Cottage #57 is in the queue to begin the framing process in July, 2010'

By July 1, any and all upgrade decisions associated with the framing process must be signed off on by all of us. Payment for upgrades will be due at that time.

Approximately 4 ½ months from framing start, a Certificate of Occupancy may be available. (Somewhere around December 1, 2010).

In early January, the remaining "Entrance Fees" will be due.

By September, 2010 it will be known whether I may be granted a 0% refundable option or not.

By March, 2010 I would be expected to be prepared to move.

While we didn't discuss it, I surmise that it isn't critical that a physical move occurs in March, but that there is a plan for payment of monthly fees to be initiated at that time.

I'm thankful to each of you for your patience with me in this seemingly endless iterative process. I apologize for needing such an extensive fact base prior to long term commitments and for my personal need to avoid "negative surprises" due to my lack of clarity on any issue. On Wed. I felt my prayer was dealt with in a positive and helpful manner. I hope that you each felt likewise. It is truly hard work to be good steward of all of our many blessings

Please correct any inaccuracies or omissions in this rather lengthy summary from the Grant perspective. Peace

Here we see in various places that the expertise register is being employed. First, Ms. Grant used the entextualizing of the meeting as a first signal of employing a professional register following a convention of minute taking. Second, she spatially segments the contents of the message using headings such as “present” and “purpose.” She also refers to other documents as “base documents for discussion.” Scholars have termed this “intertextuality,” which is a process that offers ways for referring to past documents and past conversations (Irvine, 1996).

She uses “professional” register in her word choices as well. For example, “future decision points,” “base documents for discussion.” She similarly indicates her own ability to price items, bolded by her, such as ON 5-31-10 I GOOGLED THE MILLIKEN MILLWORK CATALOGUE. FOUND THERMA TRU PATIO DOORS. FOLLOWED PRICING OPTION. LEARNED THE "PROBABLE" VERSION COSTS \$1500/UNIT. ONE WITH GRILLS COSTS \$1676/UNIT. SCREEN FOR EITHER COSTS \$168. Sent e mail re: this info.” In this

statement, bolded for emphasis and to indicate this action as a follow-up to their meeting, she displays her ability to price items through using on-line catalogs, which indexes her computer proficiency. Pricing items oneself furthermore shows an expertise, both in an ability to identify and locate items of desire, as well as to counter pricing by the construction company who would include labor costs. She additionally writes that she has already initiated correspondence about the pricing options. Interestingly, it indicates that Hannah will check on the cost effectiveness, when in fact, Ms. Grant provides the information in a timely fashion, within one week of their meeting

In addition, she employs a “construction register” indexing her ability to participate in discussions about the building of her home. She uses phrases such as “spec out” and “certificate of occupancy” and “structurally sensible way” to show her ease in this register. Ms. Grant had taken great pride to explain to me how in her current home she had designed and overseen the construction of her house. She had soap dispensers drilled into her countertops in both the kitchen and bathrooms. She furthermore made construction suggestions such as requesting an electrical modification such as a new switch in her kitchen. She likewise shows she is able to assimilate and make decisions on adapting the home for future wishes such as the wiring of the ceiling fan. She similarly uses a “construction knowledge” register in her confidence to mark outlets and switches on the diagrams provided by the staff. She draws out the construction schedule and is able to talk about framing, and the timeline of when the certificate of occupancy would be available.

She closes however, using a casual, and neither professional nor construction knowledge register. She invokes a spiritual discourse of being a good steward of all our many blessings. Ms. Grant feels “her prayer was dealt” and states her rationale for needing such detailed

clarifications. She wants to avoid “negative surprises” which may result from not clarifying requests and processes.

Another way persons assert their expertise is at the “walk through” or time when they check their unit to take possession. Sometimes this assertion is a result of past professional and “placemaking skills.”¹¹ Rowles argues that repeated assembling of space through moves often leads to the development of these skills. The “walk through” occurs after the county approves the certificate of occupancy and a place is deemed to pass inspection to be lived in. This occurs after the builder turns the unit over to the retirement community. At one walkthrough with Mr. and Mrs. Johnson, throughout the discussion of how appliances and thermostats worked, Mr. Johnson kept saying that he wanted to show the retirement community staff member his ideas. At the end of the meeting, he showed her an idea for the end of the garage. Note that this space was available to him because their unit is the only unit in which one does not enter the storage area from the garage, but rather from the master bedroom. This will not only make his desk and storage easily accessible by not having to walk through the garage, it also improves the airflow to the space because due to codes about garages, a cold air return is not possible off garages. Thus, at the back of the garage, he has an entire wall available where most have a doorway. He produced both aerial and front drawings of his proposed workbench area. A staff member, Jill, advised him to consult a custom cabinetmaker that had worked on other projects for the retirement community, including putting molding on standard cabinets for the library of the clubhouse. Both the drawings and related conversation indexed a professional discourse, where approval for a project was solicited and received. As a landscape architect, this mover asserted his technical knowledge to transform his space.

¹¹ I would like to thank Dr. Rowles for suggesting the relevance of this topic to my research.

At other points in the walkthrough, Mr. Johnson brought out his tape measure to measure drawer handles in two ways, both the exterior width (five-inch handles) and the interior (three-inch distance between screws). He displayed his technical skill by knowing to measure them both rather than rely on the exterior width to find others that would fit the drawers.

During one of my tours of the senior living residence to where Mrs. Ash moved, the marketing director, Mrs. Carey, assured me that modifications could be made, even to the point of making cutouts in existing walls (see photo of recent remodel). It seemed in this case that the retirement community was also in competition with newly built ones with a more open concept layout and the “wall cutouts” could create such a feeling.

Photo 5.4– “Wall Cutouts” in Older Retirement Community to Remodel



She also showed me choices of units where the dividing wall between two units had been taken down, thus providing possibilities for redesign of the space.

5.4.3 Modifications to Compensate for Present or Future Physical Challenges

The second reason participants were interested in modifications was to compensate for physical challenges. In the following two examples, inability to obtain the proposed modifications would break the deal of the move.

Mrs. Roger moved from out-of-state to a retirement community. When I visited her kitchen in her original house, I noticed it was small. She had a stool placed to one side as well as stools placed strategically around the home to provide support when she was not using her walker to get around her home. Foremost on her and her daughter's mind was her macular degeneration diagnosis. Her countertop choice was not about stylistic preference or similarity to what was in her current kitchen. She was choosing a countertop for the ability to see items placed on top of it. She insisted that granite was too busy. The photo below shows a pill placed on the granite counter of the model home. She kept stating that if she had granite, she would need to cover the countertop with contact paper to see the objects placed on it.

Photo 5.5-Medicine Placed on Granite Countertop in Model Home



Photo 5.6- Medicine Placed on Corian Countertop in New Residence



A second example of modifications in the new residence would help with Mrs. Baskin's function in caring for her beloved pet. At her original home, she lived with her two dogs. Using a walker and having diminishing eyesight, she found walking the dogs around the neighborhood to be more troublesome as time went on. When I arrived at her home, I saw several piles of dog feces on the front walk up to her house as she was letting them outside the front door to a small area near the driveway.

Mrs. Baskin had already decided during the moving process that she would give one of the dogs to her grandchild. She was ready to move, but requested that the retirement community allow her to install an invisible fence to keep her dog within her lawn space. This fence allowed her to take care of her remaining pet while not disrupting the architecture of the retirement community. In these two cases, the requests for modification would have hampered the move if

the requests were not granted. From my observations, the retirement community recognized the importance of the requests in order to improve the older adult's ability to navigate spaces.

5.4.4 Modifications to Promote Function

Another mover, Ms. Zachary, delayed moving in because of being severely allergic to the off gassing from the new carpet in her new unit. She knew this particularly well because in the first senior community she moved to (this was now her second), she had the same problem.

When I saw that she was delaying her move by several months, and placing philodendrons (see pictures) and fans in the rooms to clear the air, I asked her about the matter.

- 1 Ms. Zachary: It's the odor from new carpeting...the way carpeting is
2 made. My body is highly allergic...to those chemicals. That
3 odor which eventually gets out of there. I call it, it makes it
4 [my insides] raw...
- 5 Tam: You are waiting to move in? You don't think you can spend
6 The night here?
- 7 Ms. Zachary: I know it.
- 8 Tam: Did you think of anything like having tile throughout or
9 hardwood?
- 10 Ms. Zachary: I guess I'm so much of a person who...what their plan is, I
11 Just accept...and so I didn't make any big deal about that.

This transcript reveals that moving for her did not happen in a day. Not only did she delay her moving-in (and sleeping there) for over two months because of the carpet, she was driving about twice a week over an hour to check on the positioning of the plants, the fans and opening and closing windows and spreading and vacuuming baking soda.

Photo 5.7- Allergic to the Carpet Odor



Ms. Zachary had moved to a different retirement community a few years earlier. From that experience in a retirement community with long hallways and individual apartments, she learned that her allergy to the off-gassing of carpet would affect her transition into the space. This off-gassing was challenging, but she had also learned that it is challenging as a single woman without children or grandchildren to engage in conversations with other residents who wanted to talk about their relatives. After not connecting with the other residents, she felt compelled to look at another living situation. After attending a talk by the marketing director of one of the retirement communities in this study, it resonated with her that the director was not pushy about selling a product, but rather spoke to the audience about the best decisions for them.

These reasons all culminated in a move to a new retirement community.

5.4.5 Modifications Based on Other Moves and Other Spaces

Ms. Grant was preoccupied with potential modifications. When I asked her about her prior decision to move to a retirement community in the South for the winter months, she told me that her eleven years there gave her knowledge of what her needs would be for the retirement community in the Midwest. She was particular about closet designs, having a custom carpenter fashion her closets after requesting the retirement community to leave her closets absent of hanging racks. She also added Sola¹² light tubes that would bring lights into her master bathroom, where there is no window, and would allow for entering the room without the need to turn on the light in the daytime (because of the sun) or at night (because of the light generated by the lamppost near her house). Yet, she insisted that she did not want to add a sunroom, even though so many people thought it provided more room and an enjoyable space for gathering. She had clear reasons based on her experience with a sunroom at her original lake home where she ate three meals a day and based on the unit in the retirement community in the South. She reasoned that, if there is a sunroom, the living room does not get used as a gathering space. Second, she suspected that in this community with front porches, people would gather on the porch rather than go through the entire unit to the sunroom. Third, after her southern experience, she determined that she as a single person did not need more space. She did say that if she were part of a couple, she could see that a sunroom would provide separation within the unit.

Mr. Johnson and others also requested modifications similar to what they had executed in their primary homes. For instance, Mr. Johnson asked for a door that allowed access out of the garage to eliminate the need to always raise the garage door to exit the garage. This required both a door and a concrete path as modification. In his primary house, he had the same

¹² This is a brand of lights.

configuration, which he created when he converted his carport into a garage. In his primary house, he also had windows along one wall to allow natural light.

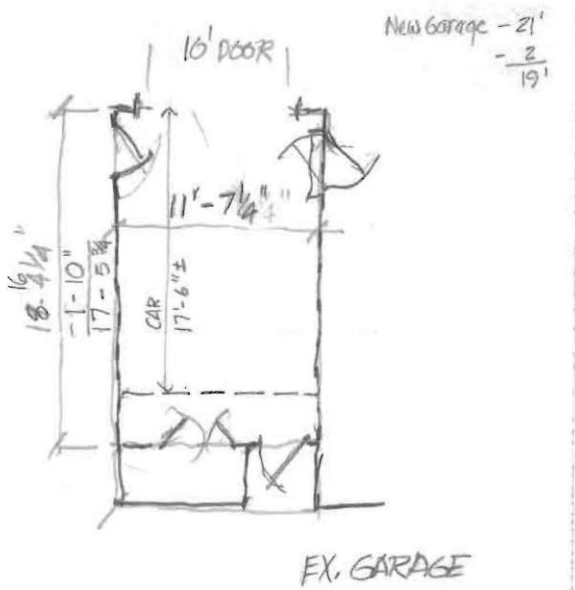
The community did not allow for this request, but he figured that it would be fine, given that the garage door itself had windows.

Photo 5.8-Modification of Original House



Photo 5.9-Door Resembling Past Residence

Figure 5.3- Sketch of Door



Mrs. Jackson has been in a wheelchair her entire adult life. She requested various modifications based on her knowledge of accessibility concerns. For instance, she requested an extension of her driveway that would allow her van to pull in and to let her wheelchair descend electronically onto concrete rather than grass. She also had specific requests for the height of her kitchen cabinets based on her accessibility needs.

These modifications were requested because in former spaces, residents knew that they contributed to their functioning. They wanted to replicate these functional designs where possible.

5.5 Application of Theoretical Frameworks

As older adults imagined a future living in a new environment, they considered with great effort the ways a new housing unit could be less demanding. In fact, this chapter shows the deliberate processes they undertook to create such spaces, through the multiple ways they personalized their spaces. Personalization can be viewed as a gift to a future self, in tandem with gifts mentioned in chapter four, such as navigating spaces, freedom from home maintenance, and enjoying the fruits of one's labors. For example, personalizations such as Mrs. Rogers's countertop selection will help her navigate her kitchen and facilitate her taking her medicines more accurately. She plans for the present and the future in this personalization choice as she predicts that her vision will decrease. Applying the SOC model, selecting living in a less demanding environment includes this countertop modification because if she were to move, but have the standard granite, she might not find the environment to be less demanding. I argue that personalization is subsumed for Mrs. Rogers in selecting living in a less demanding environment, which is why the process of selecting the materials is so crucial for her and others in this study. They can only optimize or enrich their physical capacity in their selection of this environment if the environment includes such details. In the case of Mrs. Baskin, care of her dog meant having an invisible fence as part of her new residence. Without this fence, her environment may not have been less demanding as walking her dog would have proved difficult. She had already, in the process of moving, chosen to divest herself of one of her dogs, thereby

being able to concentrate on the needs of the remaining dog. She actively requested an invisible fence to facilitate her keeping the remaining dog. She also prepared to add compensations for pet care, including planning to hire someone occasionally to walk the dog.

Both Mrs. Roger and Mrs. Baskin's personalization activities show that less demanding environments are not standardized. There is no template for accessibility and functionality. Remembering Lawton and Nahemow's (1973) theory of competence and environmental press, there is a subjective nature to the functionality of one's environment due to the importance of examining not just the physical environment, but also the individual's interactions with it.

Other cases also help develop the SOC model presented in this chapter. In Mrs. Zachary's case, selecting a less demanding environment to maintain her independence is complicated, given the fact that she is moving from another retirement community. She hopes that the new community will provide for increased social contact, but in particular ways. She hopes to find people she feels more comfortable with than in her last residence. If she does, she will optimally enrich her emotional reserves. In addition, as a woman without kin, she values the compensations available for the future.

However, she faced difficulties in the process of moving. She faced the challenges of being allergic to the carpet off-gassing. Thus, in the transition, she became more worried about her ability to live in this presumed less demanding environment. She repeatedly visited her new residence to air it out, purchasing fans and plants, depleting physical and possibly financial reserves. Perhaps if she had personalized her new space by replacing carpeting with other flooring, she would not have experienced such challenges. Compensation in this case may have been consultation about ways to choose personalizations appropriate to her allergies.

In other cases in this chapter, older adults personalized their spaces to create environments that would bring them optimization through enriching their emotional reserves. Living in a space with decorative touches brought joy and pride. Residents often showed each other their spaces and talked about the choices they had made. Lastly, these personalized touches brought feelings of control over their environment. Selecting a less demanding environment brought optimization because their particular demands or requests were met.

However, it is important to remember that these personalizations, however appropriate to the physical and emotional enrichment of residents, came at some costs. First of all, there were financial costs involved in installing requested personalizations. Second, it was clear that the retirement community charged for labor in addition to materials, so prices found on the internet or at local hardware stores differed from the actual costs to the residents for their requests. In some cases, residents were charged a fee to install a product as well as an estimated fee of the cost to remove such personalization for the next resident of their units. Third, there was an asymmetric quality to these personalizations, where some with skills and knowledge of building processes and projects asserted requests while others did not. When residents saw each other's units, they were sometimes amazed at the possible personalizations and wished they had known about these options. With this asymmetry, some gained great recognition for their clever requests, setting the tone for some residents to emerge as leaders in the community. The potential impact of this asymmetry on social relationships is still unknown.

In all the cases in this chapter, the older adults are making gifts to their future selves. They are voluntarily creating a home in a community they have chosen. They are modifying their spaces to meet their needs and desires. These actions make selection of a less demanding environment palatable and even exciting. Optimization appears easy to identify because these

decisions will enrich their emotional reserves and/or not deplete their physical reserves.

Compensations available in the less demanding environment are not always explicit in these discussions. However, compensations in the new living environment are often available, in cases where kin are not, and in cases where modifications will not be enough in the future.

5.6 Conclusion

In his book on Class, Paul Fussell argues, “classy people never deal with the future. That’s for vulgarians like traffic engineers, planners and inventors” (1983, p. 72).¹³ However, we see here that asserting one’s requests in a discourse of personalization serves to index, for some, their class standing. Their class standing is asserted both through having the resources to pay extra for their requests and through displaying knowledge and expertise about building materials and working with contractors to make requests. In Parrott’s (2005) ethnographic work on psychiatric units, she found that patients focused on creativity through dress rather than on decorating their physical living spaces. In fact, their attitudes toward their living spaces were of a transitory nature as she writes, “fixing objects to the walls of these rooms metaphorically fixed them in the institution” (p. 250). In her work, residents hope for impermanence.¹⁴ In stark contrast, the absence of personalized spaces intersects with the hopefulness of a future outside that space. In my project, modifications of space acted as a preoccupation for most future residents moving to independent living communities. While these modifications serve as gifts to the residents’ future selves, gifts of personalization also present potential dangers, both in terms of cost which could deplete some financial assets, and asymmetry where some achieved reputations of expertise and others did not, which might have unknown impacts on future peer

¹³ I would like to thank Dr. Michael Silverstein for referring me to this text.

¹⁴ Her article is entitled, “It’s not forever; the material culture of hope.”

relationships within a retirement community. These personalizations have other functions. By physically modifying spaces, the personalizations help extend older adults' visions of their time in them. Space and time are fused to create a future of possibilities.

The quote from Bakhtin at the beginning of this chapter, "Every entry into the sphere of meaning is accomplished only through the gates of the chronotope," emphasizes the meaning making that occurs through linking space and time. For this project, many meanings of moving underlay specific examples of personalization and modification. Older adults involved in these changes are coming to terms with their own disease progression and limitations due to their aging bodies. In the next chapter, we see meaning making in the complications that prevent moves, and in the survey of one's life possessions. Discourses of anxiety may be interlaced with these challenges.

Chapter Six

Complications and Anxieties

6.1 Introduction

When embarking on a move, older adults in the study experienced complications. Sometimes complications developed from the material dismantling of a household. At other times, they were financially based. In this chapter, I argue that these complications can be understood through a lens of anxieties. However, these anxieties affect more than the older adults because family members also worry about the difficulties. I conclude the chapter by discussing the various types of anxieties related to the moving practices of older Americans and the ways the SOC model may be applied to considering these anxieties.

6.2 Dismantling a Household: Memories and Attachments

For many study participants, the contents of their homes became a source of surprise, shame and frustration. Some were surprised at the number of material objects their homes contained in the basements, attics, and in drawers and cabinets throughout the dwelling. Some were ashamed of the disorganization of the objects, especially when they discovered items were ruined because of neglect or being forgotten. Often, objects became a source of frustration between couples, between older adults and their children and between older adults and the

strangers who would purchase objects while disputing prices. Lastly, some were frustrated by what their accumulation of objects might say about them or how their individual pieces of paper became a collection, e.g. paperwork that had become more burdensome over the years.

In this section, I have discussed only a few objects because in this research project, every home is full of things, some being treasured collections and some everyday objects. As I have traced the emotional motivations of moving as a gift, embedded in the processes are literally thousands of objects to be sorted, donated, sold, thrown away and kept. Mrs. Lewis explores one such object in the follow transcript. The additional participant in the conversation below, Sarah, is Mrs. Lewis's daughter-in-law.

1 Mrs. Lewis: We were telling the movers, they were saying “huh, all this stuff?”, and
2 I said well how much stuff would you have after 50 years of marriage
3 and moving around.

4 Mrs. Lewis: 47...

5 Mr. Lewis: And including a couple foreign moves.

6 Tam: Yeah, yeah.

7 Mr. Lewis: So...

8 Mrs. Lewis: And when you buy something that you really like, then it's harder to
9 part with it.

10 Mrs. Lewis: Yeah, definitely.

11 Mrs. Lewis: If you just buy stuff to have stuff, it's not as hard to part with. But if you
12 save your money and buy something you really like, then it is harder to
13 part with.

14 Mr. Lewis: For several years we, not several years

15 Mrs. Lewis: No

16 Mr. Lewis: but for sometime we ate on the floor.

17 Mrs. Lewis: We did.

18 Mr. Lewis: When we first got married.

19 Mrs. Lewis: When we first married we had a rug in the middle of the living room.

20 Mr. Lewis: And we set some candles...

21 Tam: Ohhh!

22 Mrs. Lewis: We had our silver candles sticks, and our wedding china, and we sat on
23 the rug Indian style and we ate our dinner at night because we didn't
24 have, in the morning it was cereal at the counter because we didn't, that
25 was the first table we bought.

26 Mr. Lewis: That was the first table we bought.

27 Tam: Which one?

28 Mrs. Lewis: The glass top that's out on the deck.

29 Mr. Lewis: On the patio.

30 Tam: Oh, that's nice.

31 Mrs. Lewis: There are seats to those someplace.

32 Mr. Lewis: 40 some odd years ago, almost 45

33 Mrs. Lewis: Peter was a baby. We bought a bed and a dresser and a crib and a
34 little dresser and a rocker and then that table and in Los Angeles,
35 California (changed name of place) and we still have every piece.

36 Tam: Really? That's amazing.

37 Mr. Lewis: Because that bed you saw in the basement was...

38 Sarah: Do you have the crib?

39 Mrs. Lewis: No, I'm sorry, the crib we just got rid of.

40 Sarah: Oh okay. Boy, I was just about to say I'm about ready to get rid of my
41 crib and sell it to a neighbor.

42 Mr. Lewis: We carried the crib until (place of location not audible)

43 Sarah: No I know because I remember Melissa slept in that crib.

44 Mrs. Lewis: Till just before we moved.

45 Sarah: No, I remember.

46 Mrs. Lewis: And, uh Peter heard the garbage trucking coming down the street and
47 he came running down the stairs and he saw me in the dining room
48 window crying and he said I knew when I heard the garbage man I
49 better come down here (laughs).

50 Mr. Lewis: Throwing away the crib, we'd put the crib on the...

51 Mrs. Lewis: the arm of the garbage truck came down and just crushed it and I said,
52 “oh, my babies teethed on that crib” unfortunately. They shouldn’t of.
53 There were, there were Jack’s teeth marks on there.

54 Sarah: Oh wow.
55 Aw.

56 Sarah: I don’t have that sentimental attachment to things like the crib we
57 bought. I mean there is some sentimental attachment to that. I sold it to
58 Some neighbors because they had room and a foster kid so I went here,
59 It’s a hundred bucks for it (laughter). I mean, what’s sentimental about
60 It?

61 Mr. Lewis: Well wait until your grandkids use it.

62 Sarah: But it’s, the codes change. See the safety things change so fast that
63 our crib probably isn’t up to the safety standards now. We have the
64 Pack-and-play which is like a play pen because, I’m like, “okay, that can
65 be a crib and it’s a playpen” and so I still have that but I don’t have the
66 crib-crib because what am I going to do with it?

In this transcript, the couple recounts the numerous objects they have collected over the course of their marriage. As objects circulate, meanings attach and detach, or become indexically linked and unlinked, to the objects. This can create anxiety about where objects should go during the moving process. Identifying an individual who will care for an object was often a source of concern, in addition to the logistical challenge of distributing objects to relatives across the country. Sometimes, trucks hired for the move would also drop some objects at an adult child’s home if the new residence of the older adult was nearby. Through their possessions, Mr. and Mrs. Lewis remember their past, a time when money was tight, and when they ate on a rug on a floor before they had a table. Mrs. Lewis says, “But if you save your money and buy something you really like, then it is harder to part with.” She asserts there are

different kinds of objects, objects you just buy “to have stuff” and objects that “you really like.” However, those embedded meanings of particular objects might not be obvious to another person such as one’s adult child, or the next owner.

Mrs. Lewis is able to list six items that they purchased in the early years, where her oldest son was a baby, and informs me that they still have every piece. In fact, the table is still on their porch. Additionally, their daughter-in-law asks if they have retained the crib (line 33) as she discloses that she is planning to get give away her crib (line 34) because her youngest son has already started elementary school.

Mrs. Lewis reconsiders whether she still has her crib, and then recounts the day when it left her possession when she put it out for the garbage truck. She remembers seeing her crib, purchased with hard-earned money, crushed as it was converted to trash. She also remembers the teeth marks from her second son on the crib, indexing her time as a young mother. Her husband ran downstairs to her as she cried during the experience.

Her daughter-in-law, Sarah, does not share the same sentimental feelings about cribs. Her daughter-in-law suggests that with changing safety codes, cribs may not meet current standards. She also mentions that while she sold her crib, she retains something that can function as a crib, as a place for sleeping, which is a pack-n-play—a portable crib and playpen combined. She asserts that the quality¹⁵ of the object i.e. an object that provides a place for sleeping is still present in her current possessions by owning a pack-n-play. When her daughter-in-law dismisses both the emotional and physical value of the crib, her mother-in-law counters with, “Well wait until your grandkids use it.” This conversation uncovers intergenerational differences

¹⁵ Keane (2003) argues for understanding the sensuous qualities of objects, and that all objects are “bundled” composites of different qualities.

in valuing of objects. This value system is established and recreated as different qualities of objects are appreciated.

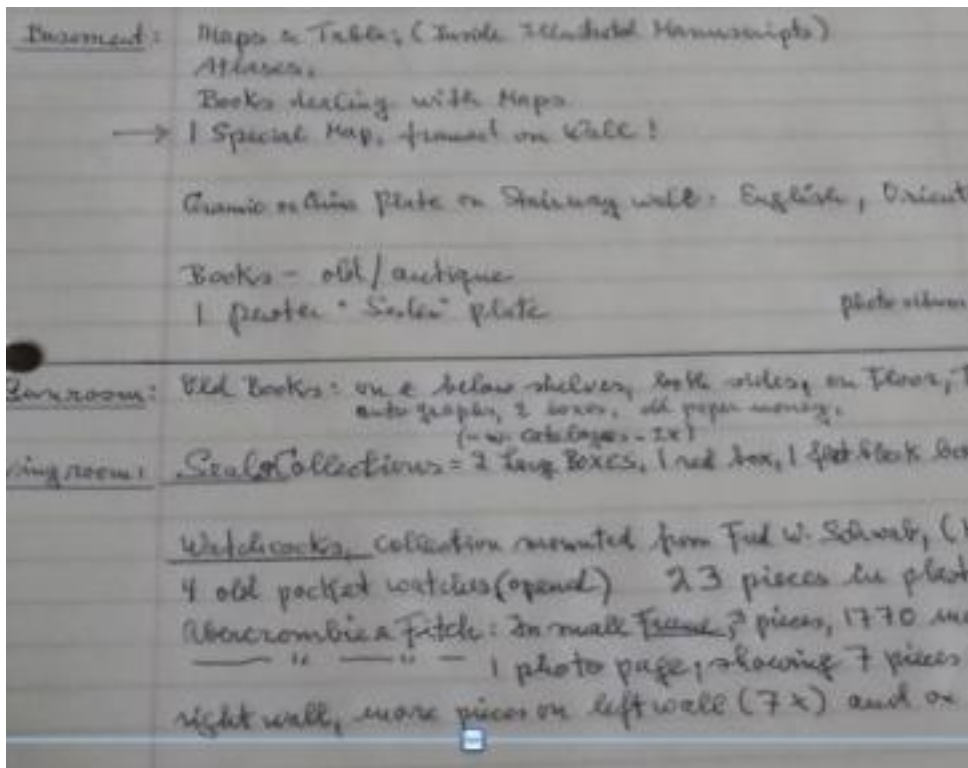
Objects, such as cribs, function in multiple ways through the moving process. Here I refer to Webb Keane's (2003) work on the multiplicity of qualities that are bundled at any one time in any given object. In the case of the crib, the qualities of the crib that are invoked are 1) the crib indexes a time when finances were tight; 2) the crib indexes a time when Mrs. Lewis was a young mother; 3) the crib indexes a time when her children were babies who teethed on the crib; 4) the crib indexes her move because saw the crushing of it as part of the dismantling of their possessions; and 5) the crib indexes intergenerational continuity as her grandchildren also used the crib within the last decade. For the daughter-in-law, the crib functions as a place for sleep, achieved by owning a pack-n-play. The crib does not have the same associations for the daughter-in-law, leading the crib and many other objects discussed in this project to be viewed as unimportant by adult kin and grandchildren. Memories are sometimes not known by the next generation. Even when they are known, they may not be valued or even if they are treasured, the next generation may not want to house them in their own homes.

6.3 Dismantling a Household: Marks of Distinction

Moving became a time for older adults to reconcile a lifetime's worth of possessions. Sometimes, as widows, they would go through their husband's collections, trying to make the best decisions in their spouse's absence. In the case of Mrs. Ash, her husband had accumulated many objects, and she went to great lengths to account for many objects individually because she was aware that many could be sold for high prices.

She made repeated lists of these possessions. She circulated these to her family members, antique dealers, and museum collectors.¹⁶ She also interviewed at least three auction houses before selling her most valued possessions, assessing their estimates of what they thought they could get for these possessions. The photo below shows lists of valued objects, grouped according to their rooms in her original home.

Photo 6.1 – Detailed List of Belongings



In *For a critique of the political economy of the sign*, Jean Baudrillard suggests that layerings of class distinction occurs when, for example, teacups rest on saucers that are placed atop doilies. Layers of expensive objects on other expensive items may be seen as redundant as a life of plenty is displayed. However, redundancy of objects to reinforce one's social standing

¹⁶ Mrs. Ash was also able to obtain assistance from social service providers. When I met her daughter, we both laughed when we remembered "the shredder," a volunteer sent to Mrs. Ash's home to shred documents. While many social service agencies support seniors, it would be interesting to know how many perceived their purview to include supporting housing transitions.

is not shown just in owning and displaying objects. Baudrillard also argues that the maintenance of precious objects through varnishing and cleaning indicates the worth of these things and illustrates Puritan values of the “ethics of protection” (p. 44). Additionally, the maintenance and systematic organization of one’s objects indexes that someone has the time to focus on these activities. In Mrs. Ash’s case, her organizational approaches, e.g. repeated lists, became a way to maintain her precious objects and to show that what she owned was worth making lists of to be sent around the country.

I was able to observe Mrs. Ash several times with specialists. At times, she did not have the expertise to differentiate the worth of the objects collected by her husband, so she would bring in experts and then make notes to remember their opinions. In the picture below, on one of over four hundred maps in their collection, she marks with a yellow post-it note that it is an “original.” For this particular map, she had a duplicate made that was hung in her husband’s nursing home room.¹⁷ She had to mark the original to show auctioneers when they came through the house.

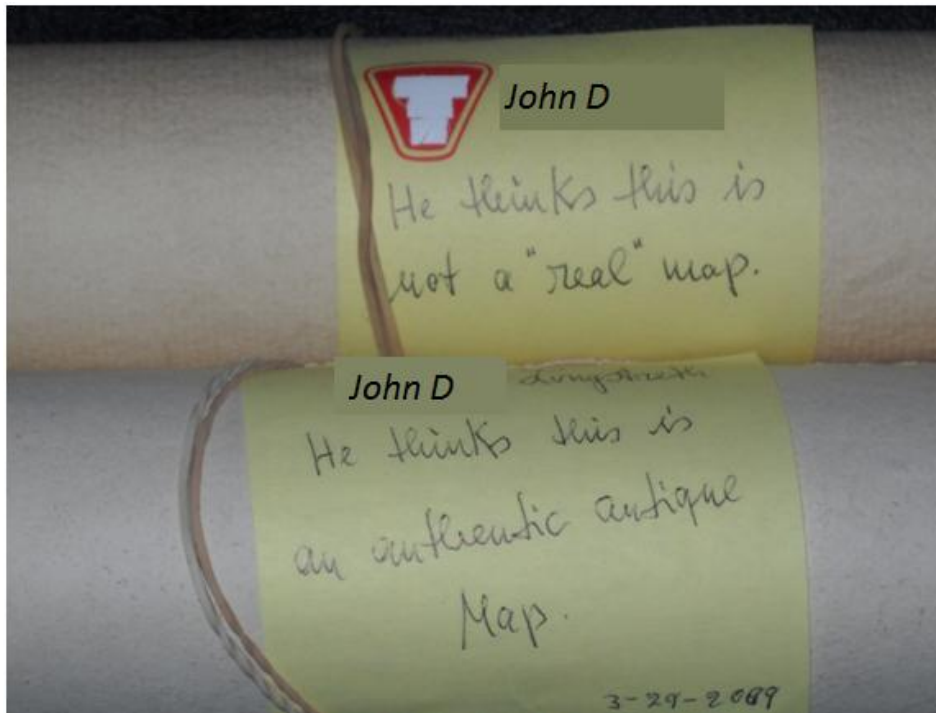
¹⁷ There is often concern in nursing homes about theft of valuables.

Photo 6.2 – Antique Map



She used the information provided by specialists to assess whether maps were “real” or “authentic.” In the photo below, she puts the name of the expert, his opinion regarding authenticity, and the date that she obtained the information.

Photo 6.3 – Real Maps?



By engaging with auction houses, Mrs. Ash also sends the message that her possessions should not end up at a garage sale where persons from the public might purchase her treasures. In describing an art auction, Baudrillard argues that the purchase of art is not just for obtaining art, it is also a key site to differentiate oneself. He asks, “Why would the dominant class have need of culture if the economic is truly the determining instance?” (1981, p. 114). He proposes that the art auction functions to circumscribe one’s peers.

Sending one’s possessions to an art auction is another way to highlight one’s class distinction. Mrs. Ash wants her possessions to circulate in a different community of consumers. She wants her possessions to have reserve prices and listings including date of production, location of production and the label “Property from the collection of Dr. D.H.A., city, state.” We actually spoke to a museum collections specialist, John D., about whether or not to list his name in the glossy printed auction program. Inclusion of Dr. Ash’s title and his middle initial were also

discussed with John D. He told me that sometimes listing the name might invite theft of one's home, but that he did not think that it would be an issue in this case. In fact, in the case of Dr. Ash's map, listing the owner and location was the reason it was purchased. In Spring 2012, John D. told me that one of the pieces sold on the day I attended the auction was donated to the local university, because the city and state was listed in the program. An art dealer purchased it on that day and later sold it to an individual who wanted to donate a piece of art to the local university. Had the description been less specific, the map may not have circulated geographically to its recent origins.

6.4 Dismantling a Household: Bargains to be Had

While valuable items were often handled by specialists or sold as single objects, garage sales functioned to disperse "everyday objects." These objects were not worth much monetarily, but needed to be disposed of due to space constraints of their owners' new housing. Several study participants held garage sales.

At one garage sale, two adult children came to help with the sale. In this case, the family had a *pre-sale* for friends and family, which served as a farewell party for the older couple moving. Family and friends wandered the house, drinking champagne and eating cake while looking at available items.¹⁸ The next day, I arrived to join the adult children in the attic of the house to throw items for sale out the windows to the grass below. The items to be sold were then categorically arranged on the lawn and driveway: housewares, camping supplies and books. The books remained under the carport for weeks after the sale. Later I returned to help Mrs. Cooper pack up the books for donation.

¹⁸ At this party, Mrs. Cooper announced that she was in my study. Some guests expressed interest in my project and one man invited me the next weekend to his wife's funeral.

At this garage sale, I encountered an example of a shared family logic about moving that was common among one family network. In this case, the family held an agreement on what a garage sale should be. When pricing a particular plate, Mrs. Cooper, knew that the plate was worth more than the low price that was marked on it with masking tape. Yet she felt that a garage sale should be a place where customers could find unexpected bargains for valuable things. Her daughter, now residing out of state, echoed the same sentiments when I asked her about the pricing of the item. It was clear that she knew that the plate was valuable but was happy to let it go at a bargain price for the consumer's potential joy at finding a bargain.¹⁹

Photo 6.4 – Garage Sale Dish



¹⁹ At another garage sale, Mrs. Sand said that if she could get \$100 for her cabinet that had resided at the entrance of her original home for many years, she would sell it. If she couldn't get that price, she would keep it. Thus, sometimes, a threshold price is a deciding factor in the keeping of items.

6.5 Dismantling a Household: Packing up Possessions

Packing up possessions happened everywhere in one's home, from the basement to the attic, from the bedrooms currently used by the older persons to their children's former bedrooms, and from the kitchen to living rooms. While the packing experiences involved decision making in every room, in this section, I focus on the mundane happenings of packing up a mud room.²⁰

²¹ A mudroom's single purpose is to serve as a transition point, from the outside to the inside, from the community to the private world of one's home. In deconstructing the interaction, there are defaults at play about the material contents of this mundane space.

Mud rooms make homes, and their owners, distinct, in Bourdieuvian terms. Many homes of study participants did not have mud rooms; instead laundry was sorted and cleaned in basements. David Cullen (2003) suggests the commodifiability of such a mud room space. He writes, "You know what I've never seen in a mud room in a typical, fancy-schmancy house? Mud. There's never any mud in mud rooms. All you ever find in mud rooms are sparkling clean tile floors and green, lace-up, rubber-soled shoes from L.L. Bean. But stick 'mud room' in your 'House for Sale' ad in the Sunday newspaper and you get to tack on another \$5,000." Having a mudroom indexes a home of a higher socioeconomic value.

This space serves as a safeguard in many ways. First, the room acts as a safeguard from making other areas of the house unclean. Second, the room provides a storage place for "just-in-case" items used to safeguard inhabitants, such as flashlights, replacement extension cords and light bulbs that help keep interior spaces functional.

²⁰ Some readers may be unfamiliar with a mudroom. In a 1958 newspaper article from the Washington Post entitled, " 'Mud Room' Protects Home," the author suggests a mud room is "a place to freshen up before entering the living areas of the house."²⁰

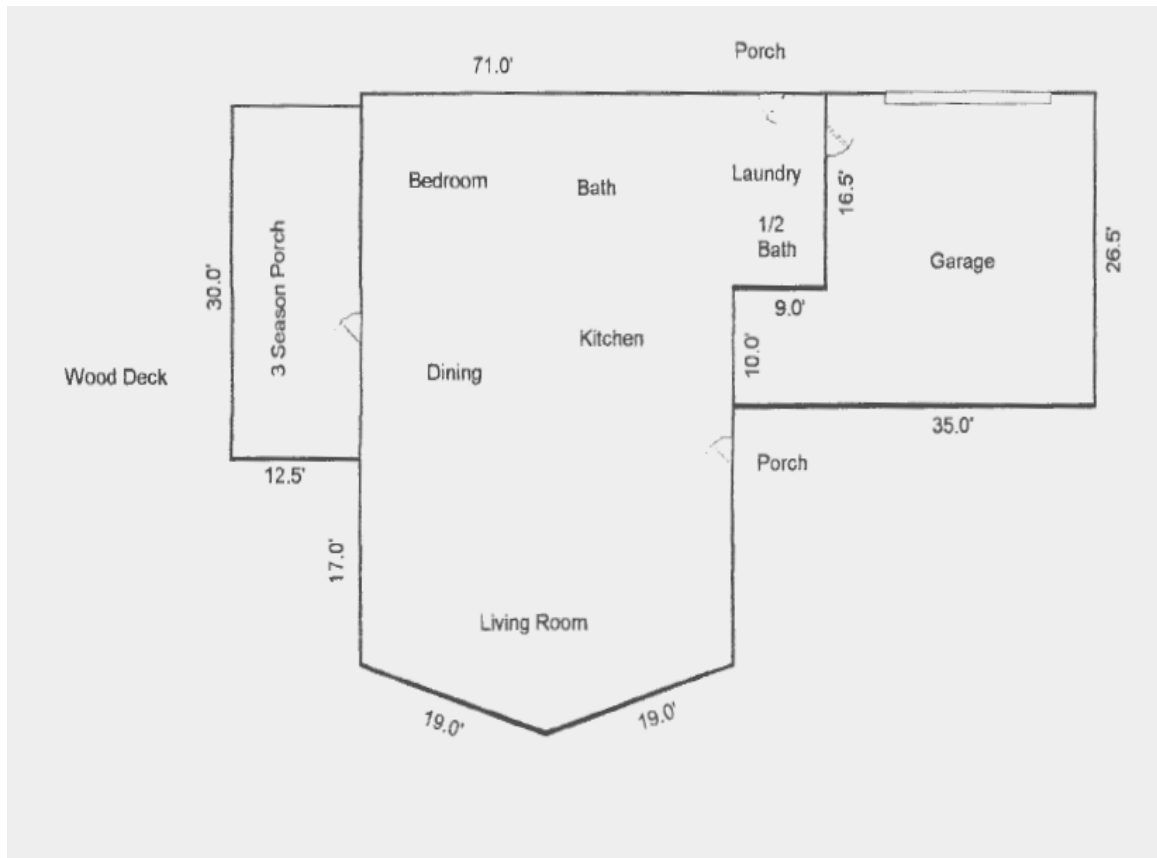
²¹ I would like to thank Ben Smith for suggesting that this mudroom might evoke different connotations if I termed the room a laundry room, given the gendered associations of laundering clothes in the United States.

On the next pages are the photo and sketch of the mud room owned by Mr. and Mrs. Keith. The sketch shows the location and size of the space.

Photo 6.5 - Mudroom



Figure 6.1 – Mudroom in Relation to House



When I first asked them for a picture of their mud room, Mrs. Keith said that it never occurred to him to take a photo of it despite the fact that they took pictures of other rooms of their home. Mr. and Mrs. Keith sent me this sketch of the first floor with the mud room labeled as “laundry.” The following discourse between the couple and their daughter, Nancy, highlights, I argue, role redefinition within a kin network.

During our packing of this mudroom, which I estimate lasted an entire afternoon, their daughter, Nancy, said to me repeatedly, “God, how many boxes of light bulbs do we have?” We also addressed collections of flashlights, ant spray, marbles for fresh cut flowers and ponchos. Mrs. Keith said to me, “The decisions are all agonizing. I’m almost to the point where (whispers) I could just throw it all away. A little later, she says, “I’m beginning to envy people who have

left, or more, lost all their stuff, or they don't have it anymore." To which I replied, "Yeah, it's like instantaneously gone."

Packing a mud room involves toil and fatigue. The persons in this study often commented on their fatigue and their need to pace themselves in the work of sorting and packing. Povinelli (2012) suggests that the embodiment of rituals is an area for further exploration in anthropology. In the ritual of moving, exhaustion was felt in both body and mind.

- 1 Nancy: This is one of my dad's ones (less clear) parents, when you go through
2 some of this stuff you learn something about your dad.
- 3 Tam: Which is?
- 4 Nancy: Why would anybody need so many light bulbs?
- 5 Tam: Yeah.
- 6 Nancy: Nobody needs this many light bulbs. Um,
- 7 Tam: Yeah, but, it's a big house, right, I mean, (laughter).
- 8 Nancy: It's kinda like, how many things of ant spray do you need?
- 9 Tam: Yeah.
- 10 Nancy: So, (name) and I finally figured out, you know what, when you're not
11 Worried about your budget,
- 12 Tam: Yeah.
- 13 Nancy: and you think you need something', you just get it. Yeah, you just get it
14 again, and again, and again, again, again, again, again.
- 15 Let's see now, you've got enough paper? Okay I'm good.
- 16 Tam: Do you think it's also cause things go on sale, like you see some, a sale?
- 17 Nancy: No, no. He's not a sale shopper, never has been, that's me.
18 ...
- 19 Tam: (Laughter). Wow, you got light bulbs.
- 20 Nancy: We have all these light bulbs, and none of them fit mom (addressing
21 mother in distance).
- 22 Mrs. Keith: It's like screws, (husband's name) has a thousand screws, and never the

- 23 right one.
- 24 Tam: (Laughter).
- 25 Nancy: Well, I'm sorry, just put one in for now.
- 26 Mrs. Keith: I couldn't find one that I...All these light bulbs, and I couldn't find one.

Here, the daughter, Nancy explains to me that by seeing so many light bulbs, she better understands her father's spending patterns. She says he is not a bargain shopper. He is just a continual buyer. Yet with light bulbs, suggested by the last line of this transcript is that even if one has many light bulbs for specific spaces and configurations, you might still need more. In fact, in line 26, Mrs. Keith suggests that she still cannot find a light bulb that fits the intended lamp. During this part of the conversation, Mr. Keith is actually replacing light bulbs around the house while we pack up the light bulbs.

Daniel Miller (1998) in exploring shopping for provisions suggests, "what the shopper desires above all is for others to want to appreciate what she brings" (p. 149). In this case, it is Mr. Keith's labor, as a purchaser of light bulbs and other emergency items, that is being analyzed, and the objects he brings into the house work to construct his role as caretaker of the home he designed and built. While Nancy does not view her father as a bargain shopper, in a subsequent interview, he explained to me to me that at a local store, once a year, they send a brown paper bag in the mail and that anything a shopper buys that fits in the bag is priced forty percent off. He always got light bulbs.

Later in the conversation, we see that Mrs. Keith is saying that it is his job to sort through his collections.

- 1 Mrs. Keith: Those, dad has to see here cause those are his things. He LOVES
- 2 flashlights along with other things.
- 3 Nancy: Tam there're more flash lights, I mean, more bulbs up here.

4 Tam: Oh, great, okay, but these don't go, you're not worried about, like, bulbs
5 that match the lamps you're bringing or anything like that, right?
6 Mrs. Keith: Well, yes, I do have to, I don't know what we're gonna do about that.
7 Tam: Okay.
8 Nancy: You will go to the store and buy them, when you need one. Right now,
9 you just don't need to pay to move 'em. Think about that, how much
10 does it cost you to pay to move this stuff, versus getting a new one when
11 you get there? It probably costs you more to move them.
12 Tam: I have thought about that.
13 Nancy: Oh, yeah, what about these bulbs?
14 Mrs. Keith: Yep.
15 Tam: I'm gonna put 'em in the box. I, I can put them in the box.
16 Nancy: She wants them in the container.
17 Tam: Yeah I'll put them in this box.
18 Nancy: I think it costs you more to move this stuff than it does to buy new ones.

Mrs. Keith seems to be protecting her husband's belongings by not letting the sorting through them be expropriated to another person (lines 1-2). Also, there are no current worries about keeping light bulbs that fit in lamps that they currently own (lines 6). They are choosing to put them into circulation by way of an estate sale and will worry about whether they need bulbs in the future. Nancy tells her mother the plan, to buy new. Then when Nancy asks "oh, yeah, what about these bulbs" Mrs. Keith says, "yep." Mrs. Keith's protection of her husband's collection is now noticeably absent. In fact, Mrs. Keith has also experienced "role dispossession" in Goffman's terms, as her daughter assumes the role of disposer. Nancy is rather emphatic, saying earlier, "We have light bulb stores in Springfield,"²² the town where the couple is moving to reside two miles away from their daughter.

²² Town name is a pseudonym.

- 1 Mrs. Keith: So, let's sell the light bulbs, how 'bout we sell the light bulbs?
2 Nancy: Dad, you can, you can buy new ones, we have light bulb stores in, in
3 (Springfield).²³
4 Mrs. Keith: We're not moving the light bulbs.
5 Tam: Well, also, they're supposed to change the light bulbs.
6 Nancy: That's right, in your lamps.
7 Mrs. Keith: (Laughter) I can't imagine calling Ray and saying, "Ray, I need you to
8 change a light bulb."

In the above transcript, we can see an additional reason for selling the light bulbs emerge aside from the availability of bulbs in the new town. In the near future they are relocating to a retirement village in the Midwest. Besides paying for their residential unit, their fees include exterior maintenance like lawn care and snow removal and interior maintenance, including the changing of light bulbs.²⁴

This brings me to thinking about the interplay of subjects and objects in the moving processes. Here is a page from the American Association of Retired Persons website²⁵ in the Preparing Your Home Section:

²³ Town name is a pseudonym.

²⁴ In a 2010 presentation to the Gerontological Society of America, and in another section of this dissertation, I've explored that older adults still seem to use stools after their moves, mostly to reach the top shelf of kitchen items. They expected that they wouldn't need to do step on stools, in a senior living space especially designed with safety in mind.

²⁵ AARP website: http://assets.aarp.org/external_sites/caregiving/preparing/lighting_your_home.html

Figure 6.2– Lighting Home for Safety



The authors draw out the connection between light and safety, perhaps to emphasize that lighting serves as a talisman against predators and personal injury. In fact, lighting is one of the criteria for assessing safety of older persons' homes. One who is responsible for the maintenance of the light bulbs of the home acts as a protector. As the older persons in my study were often homeowners for decades, maintaining the safety features in their homes was one of the jobs. These roles, however, get redefined in moving.

6.6 Redefining Roles, Redefining Spaces

This negotiation that is taking place is entering uncharted territory for this family. It is a moment of transition, in this space of transition. But I argue that the negotiations taking place here, an unremarkable event in an unremarkable space, are an exercise in “knowing your place.”²⁶ A person can “know a place” in a few ways. First, knowing one’s place can refer to learning one’s roles in a family after a move to senior living. Mr. Keith’s role of maintaining family objects is transitioning in the moving process. Nancy, coming twice per month to stay for an entire week to help, has given a lot of her time to the move. She is transitioning the adult child’s role from assisting to asserting, in David Ekerdt’s terms, in the decisions being made about the move (2006). She is also preparing to help her parents in the future, when they will need more assistance in other areas of their lives. Second, the Keiths are changing physical spaces, from the place they built and maintained to a retirement community, where others provide maintenance. Mr. Keith’s maintenance role will be reduced, if not relinquished. Third, they are entering into a new life stage. Marcoux (2000) argues that divestment is a type of investment (p. 219). More specifically, it can be considered an investment when the objects contribute to the treasuring of a person’s memory. I suggest that not every object one owns can have that importance. In this case, the light bulbs are not functioning semiotically in this way. I also suggest that even when older persons are moving, as demonstrated in this case, others may direct the divestment process.

Other scholars have studied the circulation of objects and their meanings. A collection might represent other things, like consumer habits, kinship network role redefinition, and feeling weighed down by objects. For the latter, Nancy Munn’s (1996) work on yam storage in Gawa is

²⁶ Here I draw on the original theme of the panel, “knowing your place” where a version of this paper was given at Michigan 2012.

a useful lens. She suggests that collections of yams vary by typology, those for seeding for the next crop, those for daily consumption, and those for visitors (p. 54). The visitors receive the best yams of the harvest and, she writes, “the model of excess is especially important, as we might expect, in connection with Gawa’s overseas hospitality. For visitors to be able to eat their fill, and yet to see at the same time that there is plenty left over—that there is much food that is rubbish on Gawa—is an ideal image of their community that Gawans would like to have broadcast overseas” (p. 88).

In many ways, the sheer quantity of objects in older adult American households²⁷ also provides opportunity for rot, as items put away in basements and attics were often discovered damaged as the study participants and I were planning to pack or sell them. The possibility for “rot” sends the same message: we have enough and there is more than enough left over. In a way, excess represents a vigilance in asset accumulation.

Lastly, “knowing your place” refers to a relationship of a subject to a space, and what it means to own objects and spaces. Mr. Keith is a particularly good example of a craftsman who custom built his home, to the detail of the wood beams and the mirrors mentioned in a previous chapter. I suggest this reflects a certain socioeconomic background, but I also contend that not everyone with wealth “knows their place” in the same way. As the son of a carpenter, Mr. Keith lovingly planned for every beam of his home. He brings his knowledge to his new space. In Chapter 6, Mr. Keith’s adjustment is also impacted by his “knowing your place” expertise.

In general, the packing up of one’s possessions proved to be strenuous for many study participants.. Their possessions were part of their identities and to part ways, at times, was emotional. Emotion was exhibited in conversations cited earlier about baby cribs of now grown children and art collected by a beloved partner. In other cases, the sheer amount of items in a

²⁷ One might also say American households regardless of age.

home caused some to be less sentimental. The owners wanted to finish the job of packing all the items and did not wish to explore the emotional connections to so many items.

However, it was rare that an older adult did not seem concerned or anxious about the packing process. The anxieties associated with the decisions about the numerous objects provoked a lot of worry, including anxiety about getting good prices for items, checking whether adult children were interested in certain items, getting items to adult children if they were interested and tax deductions for donations. In the next section, I turn to another set of concerns, centered on anxieties about moving resulting from financial concerns.

6.7 Financial Complications: Unaffordability

Some study participants who intended to move could not complete their move due to finances. They were excited about moving, as it seemed a good time for the physical aspect of their own strategic functioning because home maintenance and yard work was proving a significant strain on them. However, attention to the affordability of residence in a retirement community prompted a withdrawal of their deposits from the retirement community and an emotional withdrawal of moving as a gift to themselves, their partners and kin.

For example, Mr. and Mrs. Howe, ages 84 and 81 respectively, loved their small town. They met at the local factory, married, and lived their lives in this town. They enjoyed walks to the pastry shop and knowing many people in the community. When news that a senior residence would open in their town, they were excited and provided input for the building project. When I met them, they already had a vision of their life at the new place, and had chosen their unit in the community. However, when I learned more about their plans for moving, their financial concern was ever-present in our conversations. They had been upfront about their finances to the staff of the retirement community, and everyone was hoping that financially they would be able to make

the move, because emotionally, they contributed so much to the prospective residents. The residents had gotten to know each other in meetings before they moved in and Mr. Howe was known for his jokes and lightheartedness.

However, Mr. and Mrs. Howe had had to cut back on their spending in recent years since the recession. In consultation with their financial advisor, they chose to receive less monthly income in order to decelerate spending down their assets. On my first visit, I discovered this sign on their front door, publically displaying the economic impact on their household (see Figure 6.3).

Figure 6.3– No Money



They described to me in the transcript below how they changed their spending habits in recent years due to the recession.

- 1 Tam: So, with what you have now, I mean, you, your monthly, you just
2 live, and it's fine?
- 3 Mrs. Howe: Yeah. Well, we watch everything, like I said, we used to buy steaks. We
4 haven't had any steaks in. We hardly even eat any meat
5 anymore, you know, because it is so expensive.
- 6 Tam: Yeah.
- 7 Mrs. Howe: So.
- 8 Tam: Yeah.
- 9 Mr. Howe: Ah, do we miss it? Well, yeah, you know, you're yearning for a taste,
10 but then, it passes.
- 11 Tam: Yeah.
- 12 Mr. Howe: It passes.
- 13 Tam: No, that's understandable.
- 14 Mr. Howe: Luckily, we, get something for our belly to keep growling, stop
15 growling.
- 16 Mrs. Howe: I mean, we're not going hungry.
- 17 Tam: No, no I wouldn't think so.
- 18 Mrs. Howe: We eat.

In this transcript they discuss how they have had to change their spending practices, due to the impact of the recession on their financial portfolio. In lines 2-3, Mrs. Howe says that she has had to change the type of purchases she is making for food by purchasing less meat. In line 7, Mr. Howe refers to having a desire for a taste of steak, but then that moment goes by. However, Mr. and Mrs. Howe acknowledge that they are not physically hungry as they are finding less costly foods to purchase and prepare. Though the recession caused them to

reconsider a move to senior housing, the economic downturn has not caused hunger in any more serious way for this couple.

The couple embraced the idea of moving to a senior residence and remaining in their town. They had visited more affordable senior housing in adjacent towns that they would consider, but preferred to maintain residence in their beloved community.

- 1 Mr. Howe: Well, well, like we said, we were sad by, by not being able to, but, yet,
- 2 in the back of our minds, we knew we couldn't do it.
- 3 Tam: Yeah, yeah.
- 4 Mr. Howe: But, it was more, or less ...
- 5 Mrs. Howe: We hope, for some reason, you know, I don't know, we're hoping ...

Finances were always a concern, but as demonstrated in the transcript above, they were hoping that they could afford the move. I had many conversations with them about the expected value that they could receive from their home, and they said that if they were able to attain a certain value when selling it, a move would be more feasible. Also, because of their circumstances, the retirement community explored a financing option, where less money would be required to be put down in exchange for receiving less reimbursement upon leaving the unit. In fact, the retirement community solicited the state to request this financing option for them and other potential residents who could not afford such a large down payment. Also, staff at the retirement community encouraged them to stay on the list and stay active with the community in the hope that a deal could be worked out that the Howes could afford.

Even with alternative financing options, in the end, they could not afford to move and withdrew their reservation. The staff of the retirement community tried hard to be creative about financing, due to Mr. and Mrs. Howe's long commitment to the project and their likeability. Mr. Howe said to me, "Like our, like our planner said, and you know we talk about, and he said,

‘really,’ he said, ‘you’re not a millionaire, and that’s what’s living out there are, millionaires.’”

In the transcript below, we discuss the possibilities for the future.

- 1 Tam: Um, because, really, what are the options? So, then, my question to you
2 guys is like, okay, so if you’re not moving, what do you think your
3 plans will be now? To, to never move, or to move somewhere else? Or?
4 Mr. Howe: Well, it could be like, uh, never move, but...
5 Mrs. Howe: There is a chance...
6 Mr. Howe: it might depend on our health. Right now, she’s suffering with
7 shingles...
8 Tam: Oh
9 Mrs. Howe: Since March.
10 Tam: Oh, that’s painful.
11 Mrs. Howe: Oh, I tell you.
12 Mr. Howe: Going’ on for seven, seven months now.
13 Tam: Oh, horrible.
14 Mr. Howe: So, uh, it, it depends on our health. Uh, uh, if the, we could be a
15 burden to the home.
16 Mrs. Howe: To our home.
17 Mr. Howe: To our home.
18 Tam: You could be a burden to your home?
19 Mr. Howe: Yeah.
20 Mrs. Howe: Yeah, we still take care of our own property, you know.
21 Tam: Yeah.
22 Mr. Howe: The mowing and it’s a, it’s a big house, and could be overwhelming to
23 us...
24 Tam: Right.
25 Mr. Howe: one day.

In this transcript, the couple brings up their health conditions, and whether their health conditions might prompt a move. In line 15, Mr. Howe explicitly links their health with being a

burden to the home. Mrs. Howe and Mr. Howe state in the subsequent lines, “To our home” (lines 16 and 17), to perhaps personalize the burden on their home, the home that they built, the home that they lovingly maintain. In fact, when I clarify in line 18, “You mean, you could be a burden to your home?” Mrs. Howe refers to their active maintenance of the space, including mowing and snow removal.

1 Mrs. Howe: We’ve still been doing it ourselves.
2 Tam: Okay.
3 Mrs. Howe: But, each year it’s getting harder.
4 Tam: Yeah.
5 Mr. Howe: We can hardly afford to do it.
6 Tam: Right.
7 Mr. Howe: Cause, uh, you get somebody in here just to plow out that little
8 driveway , it’s twenty five dollars.
9 Mrs. Howe: Oh, it’s more than that that was...
10 Tam: And, how many times a season you need it is also...
11 Mrs. H: Yeah.
12 Tam: You don’t know. I heard it’s gonna be a really hard winter.
13 Mr. Howe: Yeah.
14 Tam: That’s what they say on the news.
15 Mr. Howe: That’s what I heard. And mowing our yard, you know, it’s a big yard.
16 Tam: Oh, it’s so big (laughter).
17 Mr. Howe: You’re not gonna do it for fifty dollars.
18 Tam: No.
19 Mr. Howe: And, if, even if it was fifty dollars, and you had it done every week, it’d
20 be a hundred dollars a month.
21 Tam: Right.
22 Mr. Howe: And, in a year’s time...
23 Mrs. Howe: But it’s more if it’s fifty dollars a...
24 Mr. Howe: Oh, I’m just saying.

25 Mrs. Howe: That's, um, two hundred.

Cost is a significant reason why the couple does not employ others to help with these tasks. It is clear in the transcript above that they know the costs explicitly for hiring help, in fact, in the last line, Mrs. Howe corrects Mr. Howe's math on the cost of lawn mowing. They know the costs and they know that the costs are beyond their budget.

1 Tam: Yeah. Okay, so, maintain the house as you can. Would you move to
2 somewhere cheaper?

3 Mrs. Howe: Yeah.

4 Tam: Like (Retirement Community) or (Retirement Community).

5 Mr. Howe: Yeah.

6 Mrs. Howe: Yeah, to (Retirement Community) right. Because well we have our
7 name.

8 Tam: Are, are you on the list?

9 Mrs. Howe: Yeah, for quite a few years.

10 Tam: So, the (Community Name), it's independent apartments, right?

11 Mrs. Howe: Right.

12 Tam: And the, what would happen if you need more help?

13 Mrs. Howe: Well, then we would go...

14 Mr. Howe: Well.

15 Mrs. Howe: in a convalescent home. Yeah, (Male Name) has said already, "Hang
16 on to that insurance. It's a good insurance."

17 Tam: Oh, okay.

18 Mr. Howe: Nursing home insurance. Uh, it doesn't pay for, uh, well you have to be
19 in a convalescent home for it to pay.

At the end of the conversation, I obtain more information about a possible plan they may have. They have put themselves on a list of potential occupants of independent apartments that are more affordable than the units at the retirement community they had hoped to move into.

These independent apartments are located in another town, meaning that trips to their hangouts, like weekly bakery visits, would not be as easy. This move would make it more difficult to see the friends they have had for over fifty years. They also have the plan that they would go to a “convalescent home” that their insurance might cover. I did not obtain the details of this plan, nor discuss which local long-term facilities would be covered under their plan.

Their proposed move was complicated financially. One large cost in the couple’s lives is their monthly fees for prescriptions. Moving wasn’t a feasible option given their other monthly expenses. Their plan is to remain in their home. Mr. Howe tells me that “We try to keep active as much as we can.” but then acknowledges, “Of course, our body tells us to slow down. So, we have to listen to it.” Listening to their bodies as they contend with the seasonal responsibilities of maintaining their homes indicates an anxiety about the future. The couple has a plan, which requires leaving their town. Leaving the familiar is one type of anxiety arising from the complication of not completing the move at this time to the retirement community nearby. Another complication is that with their health concerns, moving may prove challenging given that the childless couple does not have close kin who would assist in caregiving and relocation.

6.8 Financial Complications: Redirecting Resources

There were other cases where moves were thwarted because of inability to sell a home, leaving the older adult without the capital to make a down payment on a unit in the retirement community. Mrs. McGee provides an example about how her finances were reconfigured over the process of planning for a move. In the end, she decided not to go ahead with her plans.

When I first met Mrs. McGee, she was excited about the prospects of moving. She related the challenges of seasonal isolation of her lovely home on a dirt road. When I first

visited her home, she was having it repainted to prepare it for sale and disposing of many of her belongings, which were being stored in her garage. When I visited her later after she'd decided not to move, I told her, "I remember that you got rid of your treadmill and cleaning up..." Mrs. McGee replied, "Yeah, I, I wish I hadn't done that." I was surprised because in previous conversations, she related great pride and accomplishment at clearing out her spaces. She described what had transpired in deciding to forego her move.

1 Mrs. McGee: Uh, so, I'm lying in bed, and I'm having, for me, a mini anxiety attack,
2 thinking about getting the house ready.

3 Tam: Yeah.

4 Mrs. McGee: Okay. I get up the next day, and this expression, black fur on my hands,
5 "Something in the milk ain't clean."

6 Tam: Okay. (Laughter).

7 Mrs. McGee: Why, why am I so anxious?

8 Tam: Yeah.

9 Mrs. McGee: I have much less to do, than I did last time.

10 Tam: Yeah.

11 Mrs. McGee: Now, it is a pain, having to keep it neat when they come and all that,

12 Tam: Right.

13 Mrs. McGee: but that was always known, this, you know.

14 Tam: Yeah.

15 Mrs. McGee: Uh, and I don't unders, I don't quite get it. Why am I so anxious about
16 it?

17 Tam: Yeah.

18 Mrs. McGee: Maybe, it's a message.

19 Tam: Ohh.

20 Mrs. McGee: Then, I look at my, at (dog's name), in the backyard, surveying his
21 property. He does that very often...

22 Tam: Yeah, yeah.

23 Mrs. McGee: I, he may have a little dementia, but anyway he gets out there, and he

24 looks at his yard, and all that. It was like, I don't wanna go through all
25 this again, and I don't wanna make (dog's name) move.

26 Tam: Okay.

27 Mrs. McGee: Now, I, I'm not saying that's

28 Tam: Yeah.

29 Mrs. McGee: the reason, but it was the combination of an anxiety attack that made
30 no sense,

31 Tam: Okay.

32 Mrs. McGee: it's a pain to have it on the market, and then, you know, I'm very
33 nervous. I have not, I have not had such good luck with my dogs. My
34 last two retrievers died at ten,

35 Tam: Okay.

36 Mrs. McGee: I, I, you know, he's eleven, and he's gonna be twelve in April.

37 Tam: Yeah.

38 Mrs. McGee: And, I was like, he shouldn't have to adjust (laughter).

39 Tam: Yeah.

40 Mrs. McGee: So, I sort of put it all together, and the market was lousy. Okay? And, I
41 just decided, I'm not gonna put it on the market.

In this transcript, Mrs. McGee recounts several reasons that she took her house off the market. There is the stress of having to keep the space ready to show for real estate agents and potential buyers to see the home and grounds. Next, she suggests a reason close to her heart, her dog. She had always been concerned about the transition for her pets to the retirement community. In earlier conversations, she was also very clear that she would not move to a retirement community that would not accept pets and that she would require an invisible fence for her dogs. Scholars have documented the role of pets in the lives of older adults (Greteback et al., in press; McNicholas et al., 2005), and cities around the country have started organizations to help older adults with pet care if they are unable to care for their pets, e.g. short term

hospitalizations or rehabilitation. Here Mrs. McGee talks about the unnecessary move for her older dog. She says, “he shouldn’t have to adjust” (line 38). By saying that he should not have to leave his familiar surroundings and acclimate to a new home and surroundings, Mrs. McGee may be projecting her own feelings about adjustment on her dog. Earlier, in lines 23 and 24, she says, “I, he may have a little dementia, but anyway he gets out there, and he looks at his yard, and all that. It was like, I don’t wanna go through all this again, and I don’t wanna make (dog’s name) move.” She structures “I” and “he” as having similar conditions, “maybe a little dementia” and then in the next sentence says, “I don’t wanna go through this all again and I don’t wanna make (dog’s name) move.” In the latter part of this line, she indicates her responsibility for his move using the word, “make.” With all those reasons, she explicitly states that she has experienced significant anxiety, and that has led her to discontinue selling her home.

Later in the conversation, the theme of responsibility and anxiety is further developed. She is also faced with other ways to give gifts to her family that do not involve giving a gift of moving. She has developed financial obligations to those in her kin network. She is embedded in supporting her children and grandchildren financially, e.g. she is paying college tuition for her granddaughter. She also wishes to leave her children money upon her death. She can give these gifts in the present and in the future. However, she foregoes a gift to herself, of a navigable space, and a gift to her kids of peace of mind. Thus, while she dreamed about a six-foot soaking tub as part of stylizing her unit in the retirement community, she will forego that gift to herself in order to give other types of gifts.

In the transcript below, she recounts her family members’ circumstances.

- 1 Mrs. McGee: I could call up, but I know what they were asking, and I couldn’t
- 2 have moved. Oh, and, and, let me add, I don’t know when I last talked
- 3 to you. My son was out of work for a year.

- 4 Tam: Yeah. I remember that.
- 5 Mrs. McGee: Okay. He was out of work for a year. He got hired back at a lower salary at the store. He is not very well off.
- 6 Tam: Okay.
- 7 Mrs. McGee: My daughter, locally, she has a good, reasonably good job at the
8 University, but is not affluent.
- 9 Tam: Yeah.
- 10 Mrs. McGee: Her husband is a guitar teacher, and a Blues guitarist. Okay.
- 11 Tam: Okay.
- 12 Mrs. McGee: They have a daughter who's insane about gymnastics. God only
13 knows how much they pay a week – three times a week, three hours
14 each ...
- 15 Tam: (Laughter).
- 16 Mrs. McGee: for gymnastics! A nine-year-old. Uh, my daughter and her
17 husband in (State/City name), are probably in the best shape. He's at the
18 (Hospital name), a Social Worker. He's been there a long time, and he
19 just got a good promotion and she's a teacher for a long time. But, I
20 don't have, there's not, oh and then my gentleman friend, had I known I
21 was gonna really be with him, you know kind of
- 22 Tam: Yeah.
- 23 Mrs. McGee: forever, he has no money whatsoever (laughter). Okay.
- 24 Tam: Oh, okay (laughter).
- 25 Mrs. McGee: So, I am the richest of all the people I love.

She suggests that neither her children nor her current partner are well-off. She distributes her wealth in the present by providing instrumental support to them. In line 1, she suggests that when the retirement community contacted her about her plans, she says that she could not have moved and redirects the conversation to her son's unemployment. She explains that she could not have moved because her move would have taken place in the midst of her family members'

financial challenges.²⁸ She stresses that her son is “not very well off” (line 5) and her daughter is “not affluent” (line 8). Additionally, her boyfriend is not well resourced, e.g. she pays for her boyfriend to go on vacation with her because she wants his company while travelling. She ends with “So, I am the richest of the people I love” (line 25).

There are other implications to Mrs. McGee’s cancellation of her moving plans. She told me that in a recent rehabilitation of her knee, she had to strategically navigate her home’s stairs to do laundry in the basement and to enter the home, for all of the entrances require the use of stairs. She told me that she focused on leading with her strong leg first going down with the stairs and going up the stairs, she would lead with her weaker knee as suggested by her physician. Her move also had an impact on other residents of the retirement community where she was going to move (see transcript).

- 1 Mrs. McGee: Yeah, and then, it was very funny, I met, um, she’s a friend of a
- 2 friend of mine, uh (name of female).
- 3 Tam: Uh, huh.
- 4 Mrs. McGee: Yeah, and when I told her I wasn’t gonna be there, she said, “Oh,
- 5 now I’m the only Jew there.”

Her decision to move affected another resident, as the other resident would be the only Jewish resident living at the protestant-affiliated community. Being a member of a minority religion in a long-term care facility can lead to being left out when holidays and customs are only celebrated for the dominant culture. While I did not encounter any concrete examples of this at play, the fact that the other resident knew that she was the only Jewish resident stresses the importance of religious affiliation as an aspect of introducing oneself to a new community.

²⁸ Mrs. McGee is not the only one whose adult children faced difficult times during the planning of their moves. Other adult children had financial and/or marital distress.

In Mrs. McGee's case, anxieties lead to her cancellation of her move. Since she has chosen a new path, she also has new considerations. She recounted to me that her daughter said to her that this is the first time in her life that she doesn't have a plan. For a person like Mrs. McGee, who was embarking on the move in detailed ways, not having a plan took away her anxieties but may also lead to others.

6.9 Financial Complications: Cost of New Housing

Sometimes moves are not as viable as imagined because of the cost. The type of new living space selected may not be viewed as a prudent financial choice. In the case of the couple below, they are worried about the cost of their new home and its implication for the rest of their lives. Unlike many in the study moving to retirement communities where infrastructure was designed and built by others, the couple below served as general contractors of their new home located in a subdivision.

- 1 Mr. Lewis: The house is, we initially designed this to be a cottage and we
2 needed too much stuff for this size of a house. And ah, what
3 else?
4 Mrs. Lewis: Well, I think we
5 Mr. Lewis: Engineering-wise.
6 estimated well, the cost beforehand and it, everything cost more
7 than what we anticipated so we were over budget
8 Mr. Lewis: because even though the market is down, the
9 Tam: Yeah
10 Mr. Lewis: we hired the best worker we could find and they had many offers
11 so their prices were...
12 Tam: Their prices were at the top, at the top. But they were good and
13 they did good work and so...
14 Tam: So that's a struggle trying to balance that

15 Mrs. Lewis: The house didn't cost a lot more than we anticipated
16 Mr. Lewis: No
17 Tam: And does that worry you at all?
18 Mrs. Lewis: It worries both of us a little bit especially with the market down
19 because our nest egg is shrinking faster than we anticipated.
20 That's part of the reason he's talking about going to work out in
21 the oil fields so I think, but I don't think he's going to do it.
22 Tam: Well it's interesting. I was over at, with other seniors earlier this
23 week when the market crashed so much. Trying to gage their
24 reactions.
25 Mrs. Lewis: That's hard
26 Tam: Yeah, how have you been taking that news?
27 Mrs. Lewis: When you watch your nest egg go down every day then it's hard.
28 Mr. Lewis: Well, the market went down 10%, we went down less than 5
29 Tam: Oh, that's good.
30 Mrs. Lewis: Yeah
31 Mr. Lewis: And I have options. I'm still involved in some forward looking
32 options and I should pick my best bet and my best bet is we will
33 pick all those losses back up.

In this transcript, Mr. and Mrs. Lewis suggest that the cost of their new house was more than expected, although in line 12, Mrs. Lewis. says, "the house didn't cost a lot more than we anticipated." Yet throughout the conversation, they tell me about how the expenses of labor, as well as the building requirements for the subdivision where a home had to have a minimum square footage lead to some unexpected costs. They are also facing the building project after the Global Financial Crisis, where their assets are "shrinking faster than we anticipated" (line 16). Mrs. Lewis then explains to me that this is why Mr. Lewis is talking about working in the oil fields as a consultant to earn a some money in a relatively short time span. Yet, Mr. Lewis is optimistic, and in the last line says, "My best bet is we will pick all those losses back up."

Their children were also very concerned about the cost of the custom built house. While the move was a gift as they moved close to the children to avoid the need for them to move to take care of them, a move that places the parents in uncertain financial environments could be also seen as a complication of the idea of a gift. In fact, their daughter-in-law termed her in-laws' move an "anti-gift" after I'd discussed the theme of my dissertation work with her. Their story is also discussed as an adjustment to the kin network that occurs when older parents move locally.

- 1 Sarah: They have moved. However, you know, this is his dad's dream, not really
2 his mom's dream to build this house and his dad is like, I mean, I have
3 never met a person more optimistic like, in the like you know, ignore the
4 fact that you know, this is going to be a large part of the money that you
5 really need to live on for the next however many years you know
- 6 Tam: yeah ...
- 7 Sarah: well, yeah he has to be here. He's operating as the contractor.
8 That's how he's saving the money
- 9 Tam: nice
- 10 Sarah: see, you don't save money on building a house unless you do something
11 like that
- 12 Tam: yeah
- 13 Sarah: 'cause it's what it is you know?
- 14 Tam: yeah
- 15 Sarah: I mean, if you wanted to save money, they would have bought an existing
16 house ...
- 17 Tam: Yeah
- 18 Sarah: because his dad's got very high standards about the construction type and
19 all this stuff
- 20 Tam: Yeah
- 21 Sarah: so this was not part of the dream of taking someone else's house.

The couple's daughter-in-law, Sarah, explains to me that the building a home is not a prudent move financially. She also identifies the optimism her father-in-law has and hints that the home is being built to fulfill her father-in-law's dream, not necessarily the dream of Mrs. Lewis. While both Mr. and Mrs. Lewis agreed that living near their son was a good choice, given their past experience of caring for their parents, which required a move across the country, Sarah suggests there are other options, such as purchasing an already built home (line 15). Custom building has added another layer of concern to their move. She recounts older concerns below.

- 1 Sarah: you know, Karl, Karl thinks so too. I mean, Karl, he's like, I've seen the
2 numbers, he's like, I, I you know, I mean, he has some, some definite
3 resentment about, you know, his dad moved so many times so he
4 doesn't really have, he doesn't stay long enough to really get a pension
5 or you know, there was a lot of times where he was between jobs and
6 they had to dip into savings and
7 Tam: Ok
8 Sarah: so there was never, I don't think they accumulated as much as one
9 really could if one had really tried to and so, you know and now it's like,
10 well, let's build this anyway kind of thing, which is not the way Karl and I
11 think you know?

Sarah stresses that her husband, Karl, is fully aware of his parents' situation and yet does not approve of their lifelong employment and moving experiences. She also sharply contrasts her and her husband's approach to "thinking," which I interpreted as their spending and saving patterns, with those of her husband's parents. She told me that she and her husband have had to plan to save for his parents in case they need help later. They have also created ways to support his parents in the present. During the construction, when her father-in-law planned to stain the

beams of the new home to save money, she and her husband were concerned about his safety as he was planning to climb ladders to reach the ceiling beams. She and her husband gave his parents money to pay for someone else to stain the beams.

Anxiety about the cost of the home and the surrounding acre of land is present in the above conversations about the new home. Yet, because the parents are located so close to their son, in other ways, the move has reduced anxiety about future needs.

6.9.1 Epilogue

Within a year of the Lewis's move, Sarah's daughter was diagnosed with cancer. I have known the family throughout the uncertainty of this challenging context. When I met Mr. and Mrs. Lewis, they told me that this development "reinforces" their reasons for moving. They are limiting their travel this year to be available if Sarah and Karl need them to go to the hospital to relieve them of staying with their granddaughter or to meet the school bus for their grandson if their parents are working or at the hospital. As Sarah's mother, Claire, also lives nearby, Mrs. Lewis told me, "I told Claire when we moved here, I said you know, it looks like it's going to take five of us adults to raise those kids and darned if it isn't." The quid pro quo mentioned at the beginning of chapter one, that they will help their children, and in the future, their children would help them, is further explained below.

- 1 Mrs. Lewis: They could, we would be right there
- 2 Tam: Yeah
- 3 Mrs. Lewis: and they could still have their lives and look after our well-being
- 4 Tam: Uh-huh
- 5 Mrs. Lewis: and in the meantime,
- 6 Mrs. Lewis: we could help them with the children or wherever they needed help

7 Mr. Lewis: Old-fashioned trade-off

8 Mrs. Lewis: Yeah if they need help mulching the yard or whatever, we would
9 be there to help and help, help look after the children, and be
10 part of the children's lives. It's nice to be part of your
11 grandchildren's lives and watch them grow up.

12 Tam: Right

13 Mr. Lewis: It's almost like in the old days when the young family got big
14 enough, it would move into the big house and you'd move out
15 to the little house

16 Tam: Uh-huh

17 Mr. Lewis: And, so you would still continue to help raise the family but
18 Then

19 Mrs. Lewis: Still had your own space

20 Mr. Lewis: still you had your own space and, uh, when you needed help the
21 family that was now, you know, the kids were growing up and
22 they had, they could help you.

23 Tam: Yeah

24 Mr. Lewis: So it, it, ah,

25 Mrs. Lewis: But now, ah, this just gives us, reinforces the fact that
26 we needed to be here

27 Tam: It's amazing. I-

28 Mrs. Lewis: It just absolutely, we know we made the right choice. We knew
29 we made the right choice before, but now we really know.

Anxieties about the future financial state of Mr. and Mrs. Lewis are hidden in the present-day family emergency. They told me that Sarah calls her own mother when she wants to talk and needs help, and their son calls them. They are positioned to support the current worries of the family. Now, that is what matters most.

6.10 Anxieties at Play

The complications discussed above triggered different types of anxieties for older adults. Some anxieties are financial; other anxieties may surround not having a plan in place for the future. There may be other anxieties related to the processes of moving. In fact, other anxieties embedded in examining one's material possessions may be present--for instance, the beginnings of mental illness, e.g. dementia, at the root of gathering so many objects of one category such as light bulbs (Philips, 2012).²⁹ Sometimes, additional items are purchased because one cannot remember whether one purchased them previously. In this case, Mr. Keith told me that it was the sale at the local store that prompted his accumulation of light bulbs, and in my opinion after multiple interactions with the Keiths, does not signify early dementia. However, in other situations the accumulation might display or index the initial progression of a disease.³⁰

On the other hand, Gal suggested that the anxiety might be structured around concerns of mobility, that accumulation may index a worry that one's mobility or ability to shop for more items might be diminished in the future. Drawing on a systems perspective on consumerism and accumulation, one can see that the accessibility of older adults' homes to shopping is a concern among many urban planners, and environmental gerontologists.

When imagining limitations to one's mobility, one's autonomy is analyzed. There may be also an underlying anxiety about dependency, needing to ask others to help with shopping.

²⁹ I would like to thank Dr. Susan Philips, Professor Emeritus, University of Arizona, for suggesting this particular anxiety as well as the framing of the examples in this chapter in terms of anxieties.

³⁰ Justin Richland suggested that the merit of examining why in the face of hearing about items from a mudroom, the psychologizing of the ownership in terms of mental illness occurs. In the early stages of my project, Elana Buch suggested that when I am asked questions about hoarding, or an extreme experience of ownership, that I ask the audience why we, in the academic audience, need to pathologize ownership. I am truly grateful for her suggestion as this discourse occurs often when presenting my research.

There may also be anxiety when kin may not be available to help with shopping³¹ (Nakassis, 2012) or kin relations may not be cemented such that they would want to help with shopping and other activities of daily living.

6.11 Application of Theoretical Frameworks

The complications and anxieties presented in this chapter can be also understood in terms of both the SOC model and gift-giving. For the SOC model, selecting living in a less demanding environment to achieve the goal of maintaining one's independence may be chosen at one time, but later be reconsidered. Alternative selections may be deliberated and chosen. In some cases in this chapter older adults do not complete their selection of living in a less demanding environment due to financial concerns.

In Mr. and Mrs. Howe's case, they could not afford to move, in part because the sale of their house would not yield enough to help them afford living in a retirement community. They sought advice from realtors and financial advisors, and yet, in the end, the asset they had would not yield enough to make a move feasible. The gift that they wanted to make to themselves, of reduced home maintenance, could not be made. The gift could not be given, and if they were to have moved and given the gift to themselves, they would have had great anxiety about affordability. Thus, this is an example of gifts not being free. Gifts made would have placed their future selves in a worrisome situation as they already were experiencing financial concerns. This is also an example of the strategic nature of gift-giving. Gifts given may optimize well being in one sense, but complicate it in other ways. There was great concern that they would be in a different financial scenario than many others at the retirement community. Therefore, even

³¹ I would like to thank C. Nakassis for this idea.

though the childless couple may have had increased social contact, enriching their social reserves, they may have been limited in the types of activities they could participate in, given their difference in socioeconomic status. Mr. and Mrs. Howe's story is an example of how the SOC model and gift-giving become intertwined in the process of moving.

In Mrs. McGee's case, she chose to retract her move to redirect her resources and to make gifts to her family in alternate ways. At this point in time, she seems happy to be relieved of the stress that accompanied selecting living in a less demanding environment.

In the transition to living in a less demanding environment, moving can cause emotional and physical stress as people prepare to sell their houses and work to divest themselves of their collections. Mrs. Ash's story shows the great effort required to achieve the goal of maintaining her independence by living in a less demanding environment, as she made continual appointments to have objects appraised and sold. For an example of the stress experienced as roles are redefined within a kin network, Mr. Keith's story shows how at times adult children begin to direct moving processes of older adults. Optimization can be applied to kin, as mentioned in previous chapters where selection of the less demanding environment for older adults enriches kin's emotional and physical reserves, leaving time and attention for their own concerns. However, kin can become very involved in the transitions to these less demanding environments, using many resources to facilitate the moving processes. Families as well as older adults expend time and energy packing and running garage sales.

In other ways, older adults involve their kin in their choices. For example, in Mr. and Mrs. Lewis' case, there is concern for the financial implications of selecting living in a less demanding environment. Their adult son and daughter witnessed the cost of the project and are preparing to help the parents financially in the future. From one perspective, selecting living in a

less demanding environment will deplete the financial reserves of the older couple and challenge the financial reserves of the kin. On the other hand, their geographical closeness is enriching the emotional reserves of everyone in the kin network, especially in the time of their granddaughter's medical crisis. The present optimization accompanying the move far outweighs any other challenges at this time.

6.12 Conclusion

Circulating objects on pathways that lead from being sentimental to becoming commodified entities evokes many anxieties. Another possession that provokes anxiety is one's material wealth, or in these cases, lack thereof. The financial future, given unpredictable health needs and lifespans, is a deep concern of older Americans. The financial climate of the Global Financial Recession brought much uncertainty for some persons in the study.

The gift of moving is not easily and always given. Complications interrupt, delay, or problematize the moving process. New plans have to be constructed and calibrated with a new set of desires and fears. For those who did move, there were also unanticipated adjustments. In the next chapter, I explore how these adjustments manifest themselves in the making of a new home.

Chapter Seven

Unanticipated Adjustments

7.1 Unanticipated Adjustments

As older adults in this study moved to less demanding living environments, some encountered unexpected adjustments¹ to their new living situations. For some, living with age-graded peers had not occurred since college dormitory or military experiences. In the interim, many had been homeowners of single-family dwellings where they were responsible for the interior and exterior maintenance of their homes as well as the activities that occurred within those spaces. For those study participants who moved to retirement communities, it is important to understand what was unexpected, especially since these voluntary movers evaluated their living options as they planned their moves. Kin also experienced adjustments after the moves. These unexpected adjustments are analyzed through the lens of the SOC model and gift-giving theories at the end of this chapter.

¹ In Erving Goffman's *Asylums: Essays on the Social Situation of Mental Patients and Other Inmates* (1962), he traces the transition or "mortification" of "inmates" in a variety of institutional settings. He argues that in order to undergo socialization in the new institution, newcomers experience "role dispossession" where they must sever roles once held outside the institution (p. 14). In this study, many participants were able to maintain former community roles, especially if they moved locally.

7.2 Adjustment: Age-graded Living Environments

The meanings of living with age-graded peers became clearer after moving. In one interview with Mrs. Chaney and Mr. Chaney, she reflects on a potential obligation to other residents that may not have been considered before moving. Below is an excerpt from an interview conducted after they moved to the retirement community.

- 1 Mrs. Chaney: There is a drawback.
- 2 Tam: Okay
- 3 Mrs. Chaney: And uh what the draw back is that—well, just, it must have been two
4 weeks ago---I was taking the dogs out and I saw this fire truck coming
- 5 Tam: Uh huh
- 6 Mrs. Chaney: in, and I thought, “What in the world.” So I put the dogs in the house. It
7 was the fire rescue truck.
- 8 Mr. Chaney: Up around the corner and across the parking lot from the club house.
- 9 Mrs. Chaney: The house next to (Name) and I don’t know what was the
10 problem there. (Name) came out too, and she had her housecoat on and
11 She was barefoot, and she’s walking towards me and I’m walking
12 towards her, and it’s a cold night.
- 13 Mrs. Chaney: And uh she said you know, “should we go over there or uh what
14 should we do?” I don’t know maybe we should call somebody from—
- 15 Tam: (Name of Retirement Community)
- 16 Mrs. Chaney: (Name of Retirement Community), but I assumed that they knew
17 because of the—
- 18 Tam: Ah huh
- 19 Mrs. Chaney: And um she said, “You know that’s the one drawback of staying in
20 (Name of Retirement Community) was that’ll happen--It’ll
21 be happening a lot.
- 22 Mr. Chaney: With older people.
- 23 Mrs. Chaney: With older people--

24 Tam: So if everyone is older---?
25 Mrs. Chaney: Yeah
26 Tam: Okay
27 Mrs. Chaney: And—because this community is a small one.
28 Tam: Yeah
29 Mrs. Chaney: You're going to know everybody.
30 Tam: Yeah, yeah
31 Mrs. Chaney: And become involved with everybody.
32 Tam: Right, right
33 Mrs. Chaney: So—and you know--in other words, care for everyone.
34 Tam: Right, right.
35 Mrs. Chaney: So it's um--it's something that's—
36 Tam: Something to think about.

In this interview, Mr. and Mrs. Chaney come to terms with obligations of care that may come with residing in a retirement community. In my fieldwork, I saw care taken to give rides to others in the community, treats baked to welcome new neighbors and active efforts to involve others in social activities.

For many, moving to independent living is a conscious choice due to a disease diagnosis and progression. At Maryfield Village, there are several examples where the reasons for moving were health related, as discussed earlier. I use this section to explain how disease progression may factor into adjustment to this retirement community.

In the lobby of the geriatric center, Ms. Rogers, her daughter and I were looking at the two shelves of resources for persons with low vision, when Ms. Rogers told her daughter that another resident told her that she shouldn't be at the retirement community if she could not make her way to the dining hall for meals on her own. I was quite surprised by this statement, and it seemed like both Ms. Rogers. and her daughter wanted to talk about adjusting to living at the

retirement community, so we decided to go for lunch.

Having eggplant dip and vegetable pies at a Turkish restaurant, we discussed what happened when Ms. Rogers had recently asked for a ride to the dining hall in the first few weeks after her move because it was pouring rain. In fact, the region had had the wettest spring in recorded history according to local newspapers. Ms. Rogers was interested in getting both to meals and to exercise class. She had actually talked to several residents living nearby about securing rides, and many had given her the impression that it was no trouble and that she could have a ride any time. She had given up driving about six months before because her eyesight was changing to macular degeneration. By contrast, when I visited her at her house about ten months before, she drove me to and from the train station in her town.

I said that I had already heard about her getting rides as we had met up about two weeks after she had moved in, and it did not seem problematic at the time. Her daughter then told me that a staff member called her saying that her mother was knocking on people's doors and asking people for rides to the dining hall and that that is not something that could be provided. Her daughter said that this was something to be discussed with her mom and the staff member agreed to do so. Her daughter also said that this was a community issue, where discussion of rides might be raised.

This incident created an awkwardness where Ms. Rogers does not know who would be okay to ask for rides if needed. She started listing potential residents who might be fine with rides, naming people who have a disability or who had children with a disability. I found it interesting that she would identify people who had experience with disability rather than the neighbors who had expressed the offer for a ride anytime. I also remarked that some living at the retirement community moved because of widowhood and had seen their partners through very

debilitating illnesses. I mentioned that even though people may not visibly display a disability, such as someone with a serious heart condition, there are other residents who clearly moved there because of health conditions. So even if they were well, they could have lived through disease progression of a loved one. Ms. Rogers' daughter said that you had to have a reason to move to a retirement community; if not, you would stay in your own home.

This discussion resonates not only with the reasons that people move to retirement communities, but also the reasons people do not want to move to them. In the case of Ms. Rogers, she always revealed to marketing staff a need for a residence that would be appropriate for her disease progression. In fact, her push for an alternative to granite countertops came from an understanding of the challenge of locating items on certain backgrounds for persons with this disease. She also indicated to the marketing staff that she would be interested in transportation, as she would be giving up her car. The marketing materials clearly state that transportation would be part of the amenities provided there. It is not certain whether transportation meant to the clubhouse or to surrounding destinations such as shopping centers.

Since arriving at the community, Ms. Rogers wanted to be the one to meet neighbors, and the gardener, rather than relying on her daughter to do this. She emphasized several times to me that she hated it when people did not address her, but rather her adult daughter. Ms. Rogers' daughter also felt uncomfortable that the staff member did not approach her mom, but rather her, about the transportation matter. While this may be an example of staff turning to adult children to address concerns, hopefully older adults and adult children can work with staff members to solve challenges.

7.2.1 Questionable Characteristics: Is this Senior Living?

Another adjustment that older adults made in deliberately moving to a housing community marketed as senior housing was to wonder if certain features should be found in places constructed for the wellbeing of seniors? After moving, there were certain ways of navigating spaces that could be raised as mismatched with an idea of senior living. For example, the use of stools became a questionable practice for some of the residents of a senior living community.

First, some people like Mrs. Rogers questioned why a bar at the kitchen island would be a part of a senior living space. She felt that the use of stools under the bar was not good for older persons. When I visited her at her original home where she functioned with a walker and cane at different times, she had chairs or stools strategically placed around her house, such as in a large bathroom, halfway between the shower and the sink. Also, in the kitchen, she had a stool to rest on while chopping vegetables. But in her new residence, she was adamant that she did not want to have stools. Based on the height of countertop, she and her son decided to purchase a new IKEA table that could be placed under the counter to act as a dining table, at which she would sit on chairs rather than stools.

Photo 7.1 – IKEA Table Added to Counter in Senior Living



While Mrs. Rogers did not wish to bring stools into her new space and consciously did not plan to use them, other older adults in the study who had brought stools for their bar areas or foldable stools to be placed in closets expressed shock at being expected to use stools to reach items in their kitchen. While most of my study participants moved to the same retirement community and lived in spaces with almost identical layouts, when I entered a senior living community out of the state, of another study participant, Mrs. Ash, who moved nonlocally, the first thing she pointed out to me was her inability to reach some of the items in her kitchen cabinets. In the photo below, there are no objects placed on the top shelf of her kitchen.

Photo 7.2 – High Cabinet Shelves in Senior Living



She does however, store a small stool in case she needs to reach items. At age 91 at the time of her move, she is concerned about the hazards that would accompany falls. Another study participant, Mrs. Chaney, also expressed her concern about the objects on the kitchen shelves.

- 1 Mrs. Chaney: I have a stool...that I bring in and I go up and get my things.
- 2 Tam: In your old house, did you have cabinets you couldn't reach?
- 3 Mrs. Chaney: No...a few inches down would make a difference.
- 4 Tam: Do you think about it every time you're getting things?
- 5 Mrs. Chaney: Of course.

Mrs. Ash, Mrs. Chaney and others raised the issue of using stools with me, which leads to the question of unexpected features of senior living. When barrier-free environments are marketed, they are usually conceptualized in terms of width of doorways. The verticality of accessibility is not often addressed. Only one person, Mrs. Jackson, who has been wheelchair-bound since she was seventeen, requested that her cabinets be lowered three inches to allow to her easily reach the items on the shelves. While the others mentioned in this section do not use

assistive devices, they could have also benefited from a vertical redesign. The two choices faced by the others are either to abstain from using the top shelf or to use a stool to reach the items stored on the top shelf.

Photo 7.3 – Foot Stool in Senior Living



However, Ms. Rogers went through with her move and even planned to make her senior friendly home even friendlier. In the planning stages regarding the furniture for the house, they had made cutouts of her existing furniture and furniture to be purchased in the future. Her son, Sam, brought the cutouts with him, rolled up in his car trunk, on the day they were planning the new house space.

Photo 7.4 – Cutouts of Furniture Rolled up in the Trunk



Photo 7.5 – Cutout of Table



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They carefully laid out all the pieces of furniture, including the proposed table yet to be bought; they planned for a table, rather than a purchase of stools. As Ms. Rogers was also the older adult experiencing macular degeneration, navigation of her furniture pieces was prioritized, visualizing her pathways throughout the entire house and the use of different pieces of furniture for stability.

7.3 Adjustment: Transition From Home Owner to Renter

One of the adjustments many older adults had to consider is the transition from being a home owner to being a renter that can occur with moving to a retirement community. For those who moved to condos or smaller homes, this identity shift did not occur to the same degree although often with condo ownership, exterior maintenance and choices of lawn foliage may be conducted by the home owner's association rather than the individual owner.

One day after their move, I visited Mr. and Mrs. James. Mr. James showed me the new flat screen above the fireplace and explained how he had been arranging cable television hookup. Meanwhile, Mrs. James said that she would join us shortly as she was kneeling on the ground, caulking the grout in the bathroom. When she showed me her project, she clarified that she was almost finished caulking both bathrooms and the kitchen tiles. I was surprised by the initiative since they were not homeowners at their new space. Being renters of housing units where maintenance-free living was advertised as a reason for moving, I was bewildered by the physical labor Mrs. James was exerting, as well as the care she was taking for the new space. The care for fellow residents mentioned above translated to physical spaces as well for Mrs. James, the same woman who often brought banana bread to welcome new residents. After being homeowners for so many years, the older adults in this study found creative ways to care for the physical spaces that they moved into.

I also witnessed struggles with having the retirement community control the grounds as well as the interior spaces, rather than the older adults. After many years of taking care of the grounds of his home, Mr. Keith found himself in a controversy over spatial maintenance. In the transcript below, he recounts his situation.

- 1 Mr. Keith: I was chastised
2 Tam: What are you talking about?
3 Mr. Keith: For picking up the debris. Because the agreement with the village
4 is that this will be virginal (unclear) timber.
5 Tam: Oh where it drops, it falls.
6 Mrs. Keith: Yeah.
7 Mr. Keith: Right.
8 Mrs. Keith: It's gotta rot where it falls.
9 Mr. Keith: Which is, makes it look like a garbage pile.
10 Tam: Ohhh.
11 Mr. Keith: Now I have nothing against letting things grow on their own, except
12 Mrs. Keith: (unclear – Mr. Keith is speaking over her)
13 Mr. Keith: They want us to grow, grow poison ivy and I'm against that because
14 that is a health hazard. And I think health hazards trump vir-
15 virginity
16 Tam: (laughter)
17 Mr. Keith: In the forest. (Laughter).

He is concerned about a few things in the transcript above. First, to someone who has always prided himself on maintaining his home and yard meticulously, the appearance of the “debris” looks like a “garbage pile.” He brings in the example of poison ivy, which is also growing unencumbered. He thinks that the approach of the retirement community is potentially unhealthy. The link he makes between health and disorder continues.

Later in the conversation, he suggests that outsiders notice this policy in action and the community is becoming “famous,” in Nancy Munn’s terms, for it. Munn (1996) suggests that fame is created when others hear of the wealth or in this case, misfortune of others.

- 1 Mrs. Keith: To me, he’s made such a huge issue out of it.
- 2 Mr. Keith: No, to her, she didn’t wanna bother with it. Didn’t
- 3 even, she picked up twice, she picked up some twigs.
- 4 Tam: Yeah.
- 5 Mr. Keith: I did it for months
- 6 Mrs. Keith: No, if they don’t want us to pick them up, okay.
- 7 Mr. Keith: I, I’m sorry but I live in this community. I have to look
- 8 at this community. Others look at this community.
- 9 I’ve had people comment, you know, is it that
- 10 (Name of Community)’s run out of money, how come

And lastly, Mrs. Keith relates it to concerns of autonomy, which, Mr. Keith emphasizes, is an adjustment in communal living. These concerns are erased when Mr. and Mrs. Keith are featured in the community’s marketing materials, which were also included in an earlier chapter.

"It's been over a decade since our retirement and we have found that our needs have changed. The large home we lovingly designed and built is no longer the fun, tranquil place it once was, but is becoming burdensome. Our children put us in touch with [Name of Retirement Village] and urged us to take a look. At this stage of life, and in anticipation of the years that still lie ahead of us, we were delighted to discover that [Name of Retirement Village] provides much of what we need: a charming cottage residence with services to help us maintain an independent lifestyle; a clubhouse right at hand to provide opportunities for socializing, services and recreation; preferred access to a comprehensive care facility should we need it; and proximity to family. This clinched our decision to join as charter members of [Name of Retirement Community]."

The marketing materials emphasize the residence, the services, and opportunities for socializing. However, when socializing includes walking with friends through the community

and picking up debris, a mortification process is expected where following the community's rules on grounds keeping is an example of a way to give up one's self and become part of institutional life.

7.4 Adjustment: Aesthetics of Home

One day, I was sitting in a meeting with a group of older adults who were all moving to Maryfield Village, where the cottages look similar. They were moving to a lovely place where they would not be responsible for building maintenance. In fact, many were happy to relinquish the responsibilities of snow shoveling and home and lawn maintenance. Or at least, happiness was displayed publicly, as I have also had many conversations detailing the sadness in giving away or downsizing their tool collections. While they were planning to give them away because they would not be in the business of fixing things any longer, giving their tools away was also about giving up a long-appreciated role of humans in anthropology—the user of tools and controller of the look of their homes' exterior spaces. This is probably where some of the hanging basket controversy, discussed next, came from.

In the absence of controlling the paint color of their homes and the landscaping in the front of their cottages, hanging baskets were a way for residents to display their gardening prowess and individualize their living units. But in the discussion of what the hanging basket policy of the new retirement community would be, it became apparent that some people strongly wanted hanging baskets while others were concerned about those people, who think they are good gardeners but then, really, will let their plants wither and die. Mrs. Cooper, who strongly wanted to be able to create her own hanging baskets, offered to form a committee to water and nurture everyone's hanging baskets in the neighborhood. In later discussions, she would ask if

grass was even necessary at all in the back yards, where residents are given more leeway to tinker a bit in the garden beds. In the end, hanging baskets were not approved, because they might not maintain the integrity and homogeneity of the community. Attempts at individuality and creativity were restrained in support of an ideology of aesthetic identity. The reasons that were given were that everyone might begin by caring for their baskets, but then get sick, or travel, or simply neglect the baskets.

Were their displays of identity really compromised? Perhaps by not having such individualized displays at the fronts of the cottages, complaints about unkempt baskets were thwarted. Certainly residents stylized their interior spaces, and their back patios and gardens. But their discussion was fascinating and showed me that people chose this place because the exterior would be maintained to ensure similarity. And that staff members, professionals entrusted with this task, would execute these assurances, not the residents themselves. Erving Goffman links personal possessions to role possession. He writes, “The *personal possessions* of an individual are an important part of the materials out of which he builds a self, but as an inmate the ease with which can be managed by staff is likely to increase with the degree to which he is *disposed*” (1962, 78). The rules that the institution makes regarding objects and their ownership contribute, according to Goffman, to role dispossession. In the case of the hanging baskets, I saw some disappointment from residents as management was developing the policy.² One resident did put out potted plants and whispered to me that she hoped they would be okay on her front porch. She was not sure if the policy extended to potted plants.

At issue here are also the concerns with public as opposed to private space. In *Living and Dying in Murray Manor*, Jaber Gubrium (1975) documents some other aspects of institutional

² In a follow-up interview (April 2012), I learned that the policy was still in place: hanging baskets were permitted behind the units, but not in front of them.

living. First, he shows the changing ideas of public and private space. This ethnographic work supports Susan Gal's (1995) assertion that public and private space can be both nested and negotiated. He argues that sleep is considered an activity that can happen in both public and private spaces. When clients sleep in the lounge or dining room, it is termed "dozing" and can be disturbed (180). However, sleeping in one's room means the clients are not to be disturbed. In other words, the same practices can be interpreted in different ways, depending on the locations in which they take place. This classic nursing home study looms as an important work in documenting the trajectories of personhood in long-term care facilities.

In this instance, depending on location, the gardening practices of residents are either valued when taking place in the back yard, or seen as potentially fragile when taking place in the front, as shown in the reason for the policy against front-yard baskets (that some residents might become ill and unable to care for their plants). Also note the ambiguous nature of vertical uncertainty: if hanging baskets are not permitted but potted plants in the same location were permitted, the difference would be the height at which the plant maintains its growth.

7.4.1 Resident Wishes: Screen Doors

Part of maintaining uniformity is ensuring that the front exteriors of the retirement community remain similar in design and look. A number of residents have enquired about the possible addition of screen doors either in the front or back. Notably, the model home, the one where future residents can project their own inclinations to choose this community to live in, is equipped with a screen door on the back door. One reason residents are interested in the screen door is that more light is permitted in through a screen door than comes through three small windows about one quarter of the door height. The screen door would not only serve an

aesthetic purpose, but also decrease the need for lights to be on as much. Another reason is the possibility of creating a cross-breeze, which would facilitate a decrease in the need for air conditioning.

On Mr. and Mrs. Johnson's moving day, the front door was left open quite a bit, as boxes and furniture were being wheeled into the unit. Also, that was the first day to try out the new oven, and a large number of fumes from the oven were let out on the first usage, and so the front door was kept open. During moving day, those present discussed the need for a screen door, mostly to discourage flies from entering the premises. The Johnsons' granddaughter, accompanied by her boyfriend to help with moving day, encouraged her grandparents to keep fighting the policy.

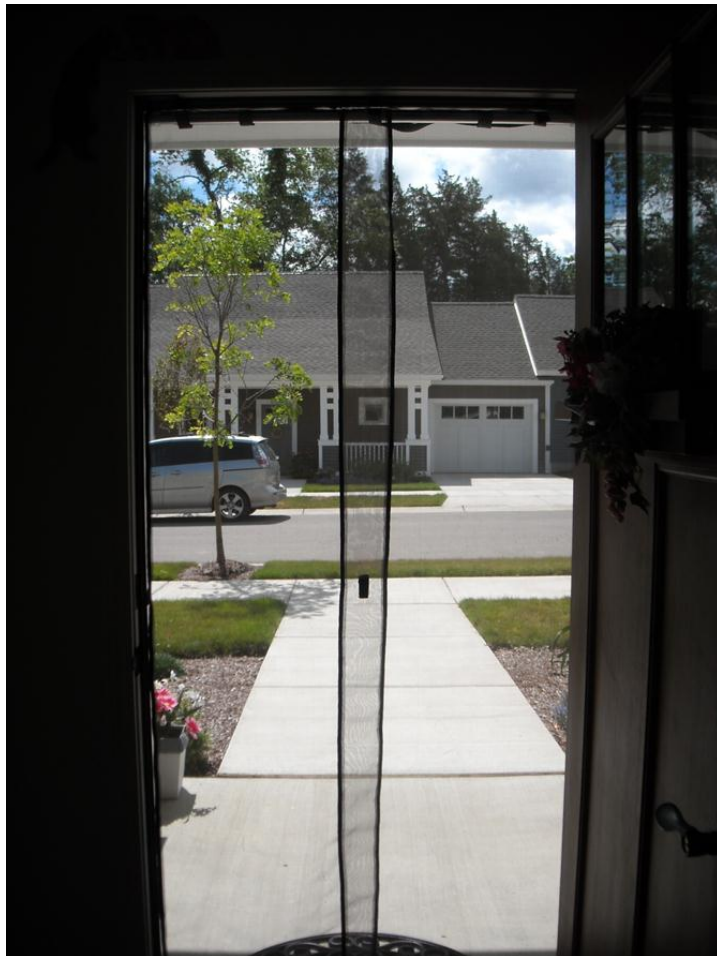


Photo 7.6 – No screen doors

In another conversation, wheelchair-bound Mrs. Jackson talked about her inability to see out to the street due to the heights of the kitchen window and the laundry room window, and the lack of screen/storm door on the front door. The lack of a screen/storm door contributed to her inability to engage with the vistas, particularly disappointing in a cottage-like, well-landscaped community. Ironically, she has been excited about moving here because of the physical access to all the units and common areas. Yet, without a screen door, her visual access to the outside was limited.

7.5 Adjustment: Not like I'd Do It

Whereas most everyone I talked with was pleased that they had completed their moves, in the follow-up visits, discussion about the space was ever-present. Many people felt that the appliances that were chosen for the units were not of the best quality, and that they would not have chosen them if they were purchasing them for their own houses. I continually was shown dishes from the dishwasher that had residue, and places where small pools of water had soaked into the granite countertop. Another issue was that the showers leaked onto the bathroom floor because the slope was not conducive to keeping the water in the shower area.

The attention to such details indexed a knowledge about homes and maintenance that was not lost through giving up home ownership. These rented spaces were thought of as equal to the homes residents had previously owned. Modifications were made to keep the first residents interested and feeling that the community cared about them. Yet, for many residents, they would not have chosen the level or type of materials that ended up in what they perceived to be their last homes. Granite was not always the preferred countertop. Many felt that Corian would be

more durable and did not require annual sealing. Some were surprised that front loading washers and dryers were not chosen, given the fact that they are often designed to use less water.

Overall, even though the residents could point out so many features they disliked, they felt were bad choices and bad designs, e.g. a shower door that hits the toilet seat (see Appendix Ten), they were still delighted to have moved. In total, not one person in this study who undertook a move expressed deep regrets about moving, or expressed longing for their previous homes.

7.5.1 The Custom Rental Paradox

With such emphasis on modification and great pride at the ingenuity involved, there was also a concern about information flow. Mr. Johnson said that people should really understand the options, and others actually felt that they were denied a request when they found out later that another unit was granted a similar request. Mr. Johnson felt that his idea of placing the door to the storage portion of the garage at the back of his bedroom closet to eliminate the need to go through the garage to access it should have been publicized more, especially because he was told by a staff member that his idea made it easier for the air conditioner to promote air flow. He prided himself on this innovation. But another adjustment to living in a custom rental also meant that innovations had to be cleared by various levels of staff.

7.6 Adjustment: Community Formation

Another occasion when new residents learn about each other is at meal time. At one meal with four new residents, they shared their stories about their decisions regarding timing. One recounted the incredible gardens that she had worked on with her husband. After her husband passed away over seven years ago, at first she felt that she could mobilize help to maintain the house and the gardens, but after a while, it became harder and harder to plan to maintain the gardens. She was used to throwing large parties in the garden, and explained to the group that she has continued to keep many of her tables and folding chairs for other groups to use in a rented storage unit. She acknowledged that when organizing her move, she was not ready to part with the items for the large events she was used to throwing. After her husband died, Mrs. Jonas fell down the stairs at a vacation home and spent nine months in a brace to recover from a broken neck. After her recovery, she approached her children about the idea about moving. Her children replied that they had been waiting for her to bring it up. Another couple seconded the experience by saying one of their sons had also expressed that he was waiting for them to initiate a conversation about moving. Mrs. Jackson said that with her husband's heart troubles, she worried a lot and maintained that she could not have done the move without him. Her husband assured her that their children would have helped.

Sharing these stories seems to be a way to get to know new people, and to know the paths that their journeys have taken. This is an opportunity to present themselves as being in control of their moves and show that their children support their decisions on the timing of the moves. This also seems to showcase what a housing counselor³ in the area has termed, "watchful waiting," where adult children have to come to terms with the fact that their parents' moves may not be conducted at a pace that the children would prefer. The housing counselor works with these

³ I would like to thank Justine Bykowski for her insight and help with the project.

kin to help them accept waiting for the older adults to make the decision about moving. Furthermore, I argue that even if the decision to move is made, this concept of “watchful waiting” can be useful for thinking about the entire process of moving, which in this study sometimes took multiple years after the decision to move was made.

7.7 Adjustments of Kin Network: Enchained Obligations

The moving processes of older adults may affect the entire kin network. While a few older adults in the study who had kin planned and executed their moves with little help from kin, most of the study participants had kin participation in various stages of the moving process. For instance, relatives packed boxes, supervised garage sales, hung pictures, and assembled tables. One adjustment mentioned as a part of the move is the receiving of possessions that adult children or other kin experienced. When I went out of state to visit Mrs. Ash in her new retirement community, I stayed at her daughter and son-in-law’s home. Her daughter Amanda’s home was lovely, remodeled with an open concept kitchen that opened up into both an informal place to eat and a formal dining room. I was delighted to find, in the formal dining room, furniture from her mother’s home that I had seen many times. Also, I saw stacks of boxes. Her mother had moved several months before my visit.

Photo 7.7 – Boxes with Objects in Circulation



Amidst her daughter's furniture lay the portion of the objects her mother had identified and saved for her. Mrs. Ash had used a color-coded labeling system that by the end of the stay in her home of 51 years, had stickers on many of the remaining items. The categories included a blue circle for her son, a red circle for her daughter, a green circle for the antique dealers that she listed by the town that they were from, a yellow circle for the house sale and a white circle for items to remain with her in her new space. A light green rectangular post-it indicated the name of the retirement community. The latter two items seem to be travelling to the same new space.

Photo 7.8 – Key for Color-coding Labels



Of these items given by her mother, should these also be interpreted as gifts in addition to moving within four miles of her daughter? These material objects, at the time of my visit, had not been absorbed into the home of Mrs. Ash's daughter, Amanda. Her daughter had other preoccupations, such as an impending divorce, which leads to another point raised in previous chapters. The moves of older adults occur within a kin network that is always subject to change.

Another adult daughter, Heather, wrote me an e-mail explaining how her life had changed because of her mother's move. Besides scheduling time during the week to help her mom with bill paying, errands, and visiting, the other major change has been holidays. She

writes, “Since I was 18, I have not lived near a member of my extended family. During the times when we did not travel to see our extended families, my husband and I developed our own holiday traditions, which often included local friends and neighbors. My mom has now become part of these events. She has done a fantastic job of rolling with the punches with these changes.”

Heather also explained that she had been able to see other family members as they were travelling to the city where she resides, which is a different state than the one in which her mother lived for many decades. However, other relatives she sees less frequently as her mother’s home had been geographically centered for some other kin. She also noted a change in her husband, or Mrs. Rogers’ son-in-law. “The other change has been for my husband to help out, especially when I am out of town on trips. I was traveling last week and he went over and took my mom out to dinner and visited with her for a little bit.” Kin relationships are being transformed both in the reorientation of geographically far kin and the involvement of geographically close kin.

Heather also described new areas she has had to learn to navigate, such as the “bureaucracy of senior care,” as well as being conscious of doing things with her mother that are not related to logistical and medical concerns. She has frequented several gardening shows, e.g. peony festival, and helped her mother at the retirement community with a scheduled and sanctioned pulling of garlic mustard.

Heather honestly concludes the e-mail stating, “I am very glad I had experience raising kids and also elder care before my mom moved here. With my mom's medical issues (vision and mobility), I knew what to expect and the type of resources I would need to find to help us with her move and getting her readjusted. Without this previous experience, I would have been very

overwhelmed by the added responsibilities of eldercare. It would be different if parents move nearby while they are still in good health.”

Kin relationships can be transformed by an older adult’s move. Even questions such as where to hold family gatherings? And will family fit into the new spaces? seem to lead to changes that coincide with a move. In the transcript below, a daughter in law explains that her mother’s traditional Christmas dish, Beef Wellington, may be made and served at a her house the following year.

- 1 Sarah: I totally felt the passing of the torch!
- 2 Tam: Did you?
- 3 Sarah: I could totally tell that she was done making this wellington and she
- 4 would be just as happy not to make this thing next year and so
- 5 Tam: Wow.
- 6 Sarah: I perceived that there may be a wellington in my house

Other older adults told me that they had already begun celebrating holidays at their adult children’s or other kin’s homes, so the move did not represent such a change for them. Some adult children and grandchildren had to readjust their cultural practices to account for the moves of older adults.

7.8 Application of Theoretical Frameworks

This chapter addresses the unanticipated adjustments experienced by older adults and members of their kin networks. These adjustments can be understood through applying both the SOC model and gift-giving theories. First, in selecting living in a less demanding environment in order to achieve the goal of maintaining their independence, older adults encountered unanticipated demands. In some cases, these demands included checking in on neighbors and adjusting to living in an age-segregated context. Such demands may be a drain on one's emotional and physical reserves, despite the compensations available in terms of staff support. Neighbors worry about others and wonder whether to intervene. Should they help someone who wanders to get back home? If they help, will they be expected to repeatedly assist? On the other hand, helping other peers may counteract dependency on other persons, like staff members. Scholars have noted that dependency scripts can be fostered in residential care settings (Baltes and Wahl, 1992).

It is clear, however, that selecting living in a less demanding environment does not always result in optimization of one's emotional reserves. In fact, Residents struggle with many concerns. For instance, some residents feel disappointed that they must still use stools, perhaps because in this less demanding environment they did not foresee such challenges and they thought these concerns would be addressed in senior living. Others struggle with the communal policies of maintenance of the physical environments that impinge on individual preferences (e.g. screen doors and cleared debris) and ownership (e.g. hanging baskets). Living in a less demanding environment also requires rethinking one's role, long-established, as a home owner. The by-products or trade-offs from selecting living in a less demanding environment do not go unnoticed. Perhaps the trade-off means less control over aspects of their living environments.

And living an environment that is less demanding in one sense can make alternative demands on their preferences and freedom.

Earlier in this dissertation, I suggested the usefulness of applying the SOC model to the kin network. By going beyond analyzing the SOC model in terms of solely the older adult, we can understand the impact of the older adult's selection of living in a less demanding living environment on others. In this chapter, family members also face adjustments. These adjustments include receiving objects, sometimes a large quantity, from the older adult. Additionally, visitations and holiday gatherings may involve the kin in different ways. Sometimes, the older adult's selection can impose greatly on the kin's time and emotional reserves in a less than optimal manner. Increased contact with kin, which may enrich an older adults' emotional reserves, may be viewed differently from a family member's perspective. Family members often confront their own pressures of childrearing and home maintenance. Additionally, as this study was conducted in Michigan, many family members experienced the effects of the state level economic concerns as well as the global financial crisis.

While staff compensations and increased peer contact may buffer the impositions on kin, some older adults will relegate certain tasks (like hanging pictures and shelves or driving to medical appointments) to kin despite compensations available from the facilities. Kin may not be able to resist or redirect these requests from older adults. As the SOC model is a model of adaptation, it shows that older adults and kin may welcome some changes and resent others.

In terms of gift-giving, this chapter highlights the complexity of moving as a gift. Gifts impose obligations that must be reciprocated over time. Though adults may move several times in older adulthood (Litwak and Longino, 1987), the gift of moving is often planned as a one-time

event. However, as kin receive this gift, they may feel obligated to reciprocate repeatedly in terms of chores, visitations and transportation. It may feel open-ended and beyond one's control to know in what forms and for how long the gift will be continually repaid. These extended temporalities foster uncertainty, and uncertainty of reciprocation is one of the ways that gift giving is dangerous.

We also see in this chapter that gift-giving can go beyond kin. Gifts can be made to peers, such as new neighbors in the senior residential community. Gift-giving can also be dangerous in this case, as evidenced by uncertainty of whether to involve oneself with other residents' safety. There are risks if one intervenes, such as being expected to be involved in the future, and having decisions made with intent to help be questioned by others. There are also risks if one does not intervene, because staff may have to become involved, which may cause concerns like wandering or disability to be scrutinized. In serious cases, a resident might be asked to leave a community by staff if it is assessed that their care needs are greater than the facility can handle. As scholars have noted the ambiguity in how these decisions of care are made (Shippee, 2009), residents may choose carefully what to disclose to staff. Second, if one does not intervene as a gift, the potential receiver may not feel obligated to reciprocate in the future. As older adults adjust to living in a retirement community, support from neighbors may become welcome.

Importantly, we see in this chapter that gifts are not free. The gift of moving comes with costs, as evidenced by the struggles with having policies affecting individual choices and preferences. Overall, most residents are delighted to have selected living in a less demanding living environment and are enjoying many components of the living environment. However, when the costs are noticed, and even contested, residents may strive to demand more from the chosen living environment.

7.9 Moving as Liminality

Moving can be a time to examine one's life course. When older adults undertake housing transitions, it can also be a time to consider the past, present and future. For the past, it is a moment to reconcile one's connections with community, kin network, and material possessions. In terms of the future, moving can be a moment in one's life to come to terms with life's next step, emotionally, physically and geographically. The adjustments or mortifications experienced by older Americans and kin in this study indicate the multi-faceted challenges that accompany a change in residence. Even when this move is undertaken in terms of a gift, entering a community involves learning new activities and adjusting to new expectations (Lave and Wenger, 1991). In the midst of examining the past and future, lies the transition, i.e. the "present," for the older adults in this project. This dissertation project documents the transitional experience of older Americans residing in the Midwestern United States encompassing both the nod to the past and the expectations of the future. In short, it is a project of liminality.

Anthropologist Arnold Van Gennep has argued that rites of transition have three phases. His work on puberty initiation rites shows that in order to complete puberty, separation from the original community (phase 1) leading to marginalization from one's community (phase 2) must occur before rejoining a community, termed reaggregation (phase 3) (1909/1960). Scholars have argued that the intermediate phase, or liminal phase, provides an opportunity for reflection (Turner, 1967, p. 105). In the liminal or "betwixt and between" phase, Turner argues that the subject is "structurally, if not physically, 'invisible'" (p. 95).

With respect to the moving processes of older adults, I suggest that "separation" entails the decision to move, as opposed to remaining in one's own house. Choosing when to move can be based on the availability of housing options and financial considerations. Additionally,

“separation” from the original house includes the mobilization of resources that can involve family members and friends. At times, individuals who are not part of an older adult’s support network can be hired, either to prepare for the move or on moving day. Emotionally, the separation from the original residence and community may also be part of the process. Sometimes this “role dispossession” or severing of roles, enables the process of socialization within new communities or institutions (Goffman, 1962, p. 14).

The liminal space in the moving processes of older Americans can be physical and emotional. The processes of moving in this study varied, from some persons selling one residence before moving, to others taking possession of a second residence before completely moving out of the first space. For many people, the moving process lasted a year or more, i.e. one could be actively “moving” for multiple seasons. Turner (1967) suggests that this phase is a stage of reflection and at times allows a subject the “freedom to juggle with the factors of existence” (pp. 105-106). Older adults assess their sense of identity as members of certain communities, especially if they will be changing their churches, community groups or towns. They also contemplate groups they may join or how life may change post-move. They also contemplate their sense of identity within a kinship structure.

Lastly, the “reaggregation” takes hold. For many in my study, they moved to retirement communities where adjustments to age-graded living were part of the process. Additionally, for many, they moved to places where their daily or weekly habituation tasks were reduced. This caused some older persons to pursue new hobbies and ways of being, to replace reduced chores. Others already had significant roles in their family and community that would continue unchanged after moving. The various experiences of post-move adjustment have been analyzed in this chapter, and I hope to analyze the “reaggregation” phase over time in a follow-up study.

7.10 Conclusion

In this chapter, I have documented the adjustments experienced after moving. Some older adults struggled with the accompanying role redefinitions of the move. Others embraced the additional time they gained to direct toward other interests. When selecting living in a less demanding environment, these adjustments were unforeseen and unknown. Only as they unfold in the future will we see if the tradeoffs between benefits and disadvantages were worthwhile.

Chapter Eight

Conclusion

This research project was designed to better understand the process of moving for older adults and also the ways older adults talk with others about moving. Throughout the process, older adults freely considered undertaking a time- and labor-intensive process by viewing their moves as being gifts. However, Mauss (1925/1990) argues that that gifts are not freely given nor accepted because a “gift necessarily entails the notion of credit” (p. 36). The gift of moving creates complications, obligations and benefits. Not all gifts are always wanted, and the complications of the moving gift include losses for the older adult in terms of former living environment, community and social relationships. They may also take the form of losses for partners and kin as they strive to accept the gift of moving, despite the move’s impact on their own happiness, free time and responsibilities. There are also complex obligations created with partners and kin, as there is often a need to repay gifts with interest (Mauss, p. 42). Another way to consider the obligations of gifts is that if gifts are unreciprocated, it makes the persons who receive the gifts “inferior” (p. 62). Partners and kin try to offer their own gifts in terms of caregiving and time to address the need for repayment. Sometimes, even when prospects are not

ideal, the benefit to moving outweighs potential complications for the elder, and older adults undertake moves in order to place themselves in a situation where they would enjoy themselves or others would experience relief because they had completed the process. The network of people and emotions involved in each move creates a complex web of both beneficial and detrimental gift-giving.

I have provided examples of moving as a gift as well as the complications that arise during and after the process that can make the gifting process non-linear. I have also shown that moving itself is not a linear process. Though moving is often conceptualized as linear by academics, older adults and kin experience many moving permutations when leaving one space and taking residence in another. Overlooking these permutations leads to only partial examinations of the moving process. The varied moving processes documented in this study have methodological considerations for scholars in terms of research design and analysis of data on the relocation experiences of older adults. Likewise, those involved in helping to plan moves, such as older adults, kin and professionals, should understand these variations. For older adults, the duration of the moving process could take a year or two, with health and logistical challenges as part of the journey.

8.1. Limitations of Research

There were several limitations to the research project. In the sample, there was socioeconomic as well as racial, ethnic and regional homogeneity. The sample was also comprised of older adults who were voluntarily moving over a long span of time. I shall discuss each limitation and its implications in this next section. These limitations can also be useful for planning future directions for research, which I discuss later in this chapter.

8.1.1 Socioeconomic Homogeneity

Since I followed older adults primarily moving to independent living residences in retirement communities, with a few participants moving to condos or subsidized senior housing, socioeconomic homogeneity pervaded the study. While several participants spoke openly of their concerns about selling their homes as a requirement to afford their new residences, others were clearly able to conceptualize and execute moves without selling their original homes. Perceptions of wealth and implied homogeneity became more individualized as relationships with study participants built. However, overall, the older persons able to execute moves had the resources to do so, including planning to live in independent senior living communities where subsidies are not available.

The socioeconomic homogeneity of the sample affected the study. First of all, the pace of the participants' moves was at times influenced by their socioeconomic resources. For example, the moving permutations mentioned earlier were a by-product of being able to afford two living spaces. Additionally, as several of the movers transitioned to a newly built retirement community, the timelines of the move were also influenced by when their new residences would be ready. Second, viewing moving as a gift, a theme that resonated throughout the study, may not have been as possible if there was greater socioeconomic variation in the sample. While financial resources influenced the completion of the gift in some cases, those in the study who did complete their moves did not require other kin to give them resources in order to complete the gift. In other situations where family members divide the costs of long-term care, the gift theme may be overshadowed by other tropes.

In their rich account of a cholera epidemic in Venezuela, Briggs and Mantini-Briggs (2003) argue that persons inhabit roles, either as sanitary citizens or unsanitary subjects, as they navigate larger structures of medical institutions and other governmental agencies. Sanitary

citizens' needs are noticed and addressed, while unsanitary subjects are blamed for their own contributions to the epidemic. The authors stress the polarity of the two groups, posited and treated as different.

Though this is not a study of health and well-being in a narrow sense, the participants in this study are viewed as sanitary citizens in a number of ways: they are posited as consumers rather than recipients of community support; their requests are considered and rarely overruled, so that when it does happen, it is noticeable; and they are people who are used to creating and executing plans. Missing in the study are “unsanitary subjects” to be blamed for their lack of resources, such as failure to plan for housing needs in old age. As this is a study of mobility, those that lack mobility would be selected out. However, as I conducted numerous pre-move interviews with persons who did not complete moves, and post-move interviews with persons of varying financial assets, blame for one's own situation in older adulthood did not once occur. For example, one research participant I met in a post-move interview had moved from her car and asked me if I would pay her for her interview. Most others did not request compensation for participating in the study and at times, provided me with food and lodging and even material gifts. Perhaps, society views older adults as protected from blame, given the history of social welfare programs toward all older Americans like Medicare and Social Security, rather than divisively supporting only some older persons' medical and financial well-being.

8.1.2. Racial, Ethnic and Regional Homogeneity

Most of the sample participants were Caucasian. While ethnic and religious diversity became topics of conversation at times, such as in discussions about being Holocaust survivors

or bringing heirlooms from other countries, or being a member of a religious minority, the majority of study participants were Caucasian, of Christian upbringing, and lived in the Midwest. The ethnic and racial homogeneity as well as regional homogeneity mirrors the statistics on users of long-term care environments. Scholars have documented the disparate use of residential and community based services by racial minorities (Scharlach et al., 2008; Himes et al.; 1996; Mui et al. 1994). There are also related phenomena that explain the homogeneity. Borsch-Supan (1990) found that nonwhite older persons are most likely to live in a household with other individuals even though overall the use of institutions for residential care has risen. Recent studies also note that African Americans were 54.5% less likely to engage in nonlocal moves than whites (Longino et al., 2008). However, since the new millennium, use of long-term facilities has increased 14% by African Americans. Researchers have identified another concern, which is the quality of facilities. In studies of closures of long-term care facilities, seen as causing a type of involuntary move, African Americans were four times as likely as Caucasians to reside in a facility with a risk of closure (Capezuti et al., 2006). As far as living in the Midwest for the long term, that was both a product of a single site study and also, for a study focused on moving, most persons had remained in their homes a long time and chose to relocate in the area.

8.1.3. Pace of Moving Process

Participants in this study also had the resource of time. With the exception of health events like a broken leg or the removal of a tumor on the lung, health events did not extend the moving process. Participants moving locally had ample time for their moving. Due to their close proximity, many could make quick trips to discuss modification possibilities with marketing staff, track the sunlight patterns throughout the day in order to change units based on

the sun's pattern, measure the space available for possessions, and bring carload after carload of items to the new residence. Non-local movers in this study also had time to visit a new residence a few times, and to interview doctors in the new town before moving. However, with ample time came the opportunity to feel overwhelmed, and to deliberate over specific items and collections.

I suggest that time served as both a limitation and a strength. As a limitation, I did not track moves of older persons that occurred suddenly, such as an older person being unable to return home after a hospital discharge. I expect that if the moving process were truncated in terms of time, many activities evident in this study would not have been undertaken, such as choosing of paint colors and hiring professionals to help plan for the spatial layout of furniture. Perhaps the redistribution of possessions to kin would also not be as planned and might even have occurred in a less systematic or comprehensive manner.

On the other hand however, moving in a slow manner allowed for anthropological engagement in a sustained way. Barusch et al. (2011) argue, "prolonged engagement helps a researcher to identify and 'bracket' his or her preconceptions, identify and question distortions in the data, and essentially come to see and understand a setting as insiders see and understand it" (p. 12). In this case, the ethnographic approach to the project helped me understand the detailed manner in which older people plan and execute their moves. I suggest that the deep relationships that developed with the research participants built trust such that now, if these participants move again, perhaps in a crisis, I would be permitted access. This project highlighted that trust is crucial if a researcher is to be allowed access to the emotional and physical spaces of older adults.

As moving was offered as gift to kin, and obligations to reciprocate the gift meant that the gift couldn't be completed in one turn, the pace of the move may affect the pace of the reciprocation. These temporalities, created in the process of moving, are an integral part of gift-giving relationships. If kin are deeply involved during a lengthy moving process, as in the case of Mrs. Keith's daughter, who made visits to her parents every other week to help them pack, do the kin feel that less reciprocation effort is needed after the move? Or would reciprocation operate at an analogously slow pace? Yet, in the Keiths' case the slowness and deliberateness offered their own advantages to the kin. The slow pace provided the family ample opportunity to discuss the importance of certain possessions and decide where to place them. It also provided time for Mrs. Keith's daughter to assert her opinions about her parents' possessions (e.g. lightbulbs).

Alternatively, does the slowness of a move affect the strength of the obligations to kin? In a future study of moves in crisis, it would be interesting to understand how kin obligations operate differently given different paces of moves. Furthermore, as gifts are never closed and completed, the pace of the move may also affect other gifts older adults and their family members may make to each other.

8.1.4. Voluntarily Moving

The older adults in this study chose to move. Adult children, medical professionals or legal guardians were not deciding that a move would occur, where the older adults would move and how the process would unfold. The voluntarily nature of the moves produced data where discursive arguments or disagreements about moving may have been diminished. Also, older people controlled how their social network involved in the moving process would be defined, rather than have others decide who would be involved. As far as timing, the older adults decided when it was best for them to move--for example, how moving fit with their summer travel plans.

8.2 Significance of Research

As I have argued throughout this dissertation, older adults may frame their moves in terms of a trope of giving gifts both to themselves and to others. As families face decisions about the housing needs of older loved ones, discussion topics between older adults, family members and professionals can include physical and cognitive functioning such as ability to perform Activities of Daily Living (ADLs) and Instrumental Activities of Daily Living (IADLs). Additionally, possibilities of home modifications and strategies for remaining at home are often discussed.

When focusing on emotional components, isolation and its implications for physical safety can intersect. This may take the form of concern about falls for an older person who lives alone, such as Mrs. Ash of chapter 4, and her family's concern about the task of her getting the mail six days a week. Thus, this study suggests that there are other important emotional motivations embedded in the moving process. This text uncovers these motivations and shows the interpersonal nature of the senior moves. However, it is also important to point out that perhaps there is an emotional need to frame one's move as a gift, rather than thinking about a move as being driven by others.

This study contributes to literature on moving transitions for older adults because it provides knowledge about who will move, and who will age in place. These insights can serve communities who are both providing community based services and planning residential facilities. Additionally, professionals helping older adults make decisions about housing needs should consider the emotional motivations of older adults who want to age in place and those who want to move. This study highlights the significant emotional work involved for the latter

population. Scholars have identified “relocation stress syndrome,” defined as the psychosocial and physiologic changes that occur after relocation (Bekhet, A. K., Zauszniewski, J. A., Nakhla, W. E., 2009). By better attending to the emotional work involved in moving transitions, we can also work to understand the importance of transitions in post-move adjustment for older adults. Because post-move adjustment has implications for mortality, depression and other wellness indicators we need to better understand the role of transitions in these adjustments.

8.2.1 Importance of Language for Social Work

This interdisciplinary project captures the importance of careful attention to language, most particularly conversational interaction, to social work. While other scholars focusing on language and aging have described the practices of others speaking for older adults (Keller-Cohen et al., 2006) and speaking to older adults in patronizing, simplified ways (Hummert, 1994; Atkinson and Coupland, 1988), this study did not document such practices.

Instead, this project revealed older adults asserting themselves with their kin, and with staff. Possible reasons for this finding include the composition of the research sample or the research project’s attention to the voluntary nature of moving. Overall, those who were choosing to move retained control of their conversations. Even when there were disagreements between older adults and kin (recall the story of the paring down of light bulbs), the older adult’s voice and opinions came out in other domains. Featuring the conversations of older adults asserting their wishes is an important contribution to the field of language and aging. As scholars understand extended longevity in older adulthood, the voices of older adults and interactions of older adults with peers and kin will continue to diversify.

There was also a conspicuous absence of family conflict, perhaps due to sampling bias where those who agreed to participate in a research study involving members of their social network may not be in deep conflict with them. Additionally, perhaps the topic of moving is not as deeply conflictual as other topics, say more specific topics about inheritance and wealth transfer, or which adult child will be responsible for caregiving as parents age. Due to the complex nature of moving as studied in this project, it was possible for the family to gloss over conflictual components by focusing on other aspects of the move.

Geriatric social workers will gain knowledge and insight by close attention to the conversational approaches and patterns of older adults and their kin and the contexts in which these conversations take place. By older adulthood, the nature of particular relationships with one's kin are often long-established. As older adults and their families undertake housing transitions as possible reactions to health or mobility challenges, this transition is a time where a older adults and family members may discuss care plans for the future, care needs of the present, and the distribution of assets and possessions of the older adult. Social workers can benefit from understanding that all these conversations take place in context. Some of these contexts for older adults considering relocation include histories over a life course. These include medical, residential and financial histories of the older adult. In addition, family histories of how older adults are cared for in a family, and how involvement and responsibilities are defined, are also relevant. I argue that a linguistic anthropological approach to the study of language incorporates these contexts, and takes into account the speakers' positions within a family.

Other scholars, too, are raising these issues as methodological concerns. In *Qualifying the Qualitative Social Work Interview: A Linguistic Anthropological Approach*, E. Summerson Carr (2011) argues, "Considering social work's historical commitment to the person-in-

environment on the one hand, and qualitative researchers' attention to the socially embedded nature of social science data on the other, the challenge for qualitative social work research is to connect content to context – both in the sociohistorical contexts in which people speak and in the interactive context of the interview itself” (p. 140). This project has featured researcher-conducted interviews with older adults and conversational interactions between older adults and their children, while providing family contexts as well as contexts of the global financial crisis and housing market crisis. Social workers with better understanding of the impact of contexts on conversations will be better positioned to work with older adults and their families who are considering, planning, and executing moves.

8.3 Theoretical Contributions of Research

8.3.1 Application of Baltes and Baltes' Selection, Optimization with Compensation Model to Project

The Baltes and Baltes model of strategic functioning was used as an analytic lens for research design, data collection, including instrument design (see Appendix One-Three), and analysis. I have suggested earlier in this dissertation that the Selection, Optimization with Compensation model can be applied to this project. In order to maintain their independence, the individuals selected living in a less demanding environment. Through the case examples, I have shown how the model applies to their experiences. Studies have shown differences between resource-rich and resource-poor older adults in ability to execute the SOC model (Jopp and Smith, 2006). As this is a study of resource-rich older adults, it is important to remember that the model's components may be unique to the set of resources available to the study participants.

By selecting living in a less demanding environment, their lives may have been optimized in multiple ways. However, not every older adult in the study did necessarily achieved all the possible optimizations. For many, their emotional reserves were enriched by living in a less demanding environment. For example, their emotional reserves were often optimized because of the peace of mind and relief so many told me they experienced. Feelings of liberation were the dominant emotions expressed by study participants. They could look ahead without the weight of the move or the dread of an accident in their original houses. It is important, however, to remember that not every person moving experienced this relief.

Another way that some older adults optimized their lives was that after moving, their health care needs were better set-up for the future. This meant less worry about future health care needs; thus they would not deplete their emotional reserves with these concerns. For those who moved to retirement communities, the continuum of care would be available when needed. For those who moved to condos or smaller homes, some of their health care needs were addressed by choosing to have a master bedroom on the main floor. These types of accommodations were useful in cases where they were using assistive devices like walkers or wheelchairs to navigate their spaces.

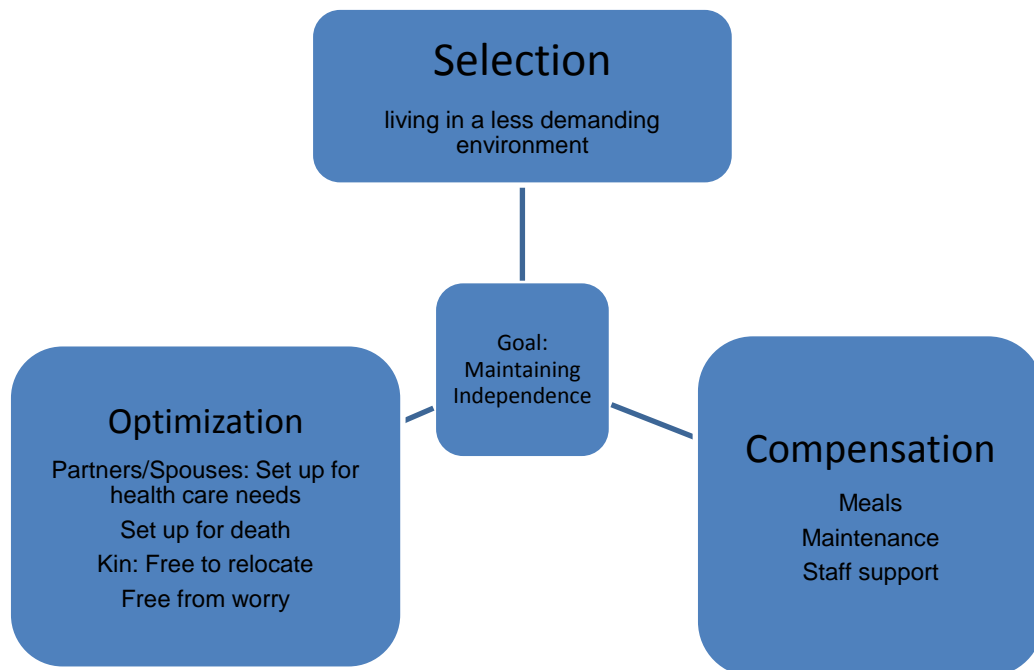
In terms of compensation, living in a less demanding environment often meant a living in a residence with a spatial layout that could compensate for physical needs that may occur in old age. Also, for some study participants, compensatory services may be available at retirement communities, such as meals being served in a dining hall or delivered to a housing unit, or housing maintenance such as housekeeping and maintenance of interior and exterior physical environments. As the original paper notes that living in a nursing is the selection of a “less

demanding ecology” (p. 24), this project builds upon and expands the application of the model to housing available for older adults in the new millennium.

8.3.2 SOC Model and Networks

This study also applies the Baltes and Baltes framework to a network perspective. I argue that moving can be conceptualized in terms of a gift to oneself, one’s partner or one’s kin. Framing moving in this manner provides an opportunity to conceptualize optimization interpersonally. Figure 8.1 shows how selecting living in a less demanding environment “optimizes” well being of both spouses and kin in different ways.

Figure 8.1 Interpersonal Application of Baltes and Baltes model



By applying the Baltes and Baltes model to a kin network, we can see how optimization can be possible for partners/spouses and kin. One strength of an anthropological approach to this

research is the possibility of tracking a network through the moving process, using formal interviews and observation to find out how older adults' lives might be optimized.

8.3.2.1 Optimization from a Network Perspective

Living in a less demanding environment can optimize partners/spouses' lives in several ways. For example, moving set one spouse up for an easier living situation. Mrs. Johnson, who has multiple sclerosis, now has a home with laundry and an office on the first floor. She has also been able to reduce her cooking as she and her husband are eating 20 meals per month at the retirement community's dining hall.

Living in a less demanding environment can also be a way to look ahead to the inevitable passing of a spouse. One participant who had a stroke moved because if anything happened to his wife, who is his primary caregiver, he would be residing in a living environment where he could live independently. Others felt that if one spouse died, they would not want the other left with the job of moving and all that it entails. Therefore, couples often moved together to position the remaining partner in an optimized state.

Kin also felt that their lives were optimized by their relatives' transition to living in a less demanding environment because they were free to move away and were relieved of discussions to plan of the moves and the physical labor that moving involved. Many expressed relief that lawn care and other tasks were no longer a concern.

8.3.2.2 Compensations from a Network Perspective

There are many ways to consider compensations according to the Baltes and Baltes model. Compensations include meal delivery and home maintenance. Staff may also support older adults' emotional needs by providing activities and socioemotional support. Moreover, if healthcare needs increase in the future, retirement communities provide an environment with additional compensations of health care delivery.

These compensations would impact kin as living in a less demanding environment would bring relief and freedom to kin knowing persons other than themselves were involved in the older adults' lives. These compensations may come in the form assistance from an employee of the retirement community or a staff member of a home help agency not affiliated with the retirement community. Thus, by selecting living in a less demanding environment to achieve the goal of maintaining one's independence, the older adult may move beyond family caregivers to formal caregivers either for the present or in the future.

In expanding the SOC model to include interpersonal optimization, we must also consider the obligations that may accompany moving. While moving can be a gift, it is also important to consider how one act of moving may be exchanged for future emotional and instrumental support from spouses and kin. If the new living environment is close to kin, it may bring on the expectation of greater family involvement in the older adult's life. In this project, I have tracked a kin network's functioning and also concomitant obligations that occur. I argue that the SOC model can be broadened from an individual's perspective of strategic functioning to encompass a kin network. Follow-up studies with the same sample may further highlight the challenges experienced by the kin network that may not always be seen as optimization.

8.4 Contributions to Anthropology

8.4.1 Contributions to the Gift Giving Literature

This project also contributes to knowledge on the gift giving experiences of older Americans. I had expected that the project would focus on certain possessions during the household disbandment process, but it quickly became apparent that the focus would be on understanding the move, rather than the circulation of specific objects.⁴ Considering the amount of objects in a household, accumulated over a lifetime, there are different ways to think about objects. And although some are, not every object may be laden with memories or ancestral ties. (p. 54).

I have argued throughout this dissertation that moving is a processual gift, beyond any one material object. The “weight” of objects housed in residences demonstrate that moving is a gift in the very act of completing it. Those who did not complete it wanted very much to accomplish the gift. Mr. and Mrs. Howe are saddened, whereas Mrs. McGee does not appear saddened. However, both recognize that their housing may not suit them over time. They know that they await a crisis; Mr. and Mrs. Howe have no children and so are hoping to be able to manage on their own. Mrs. McGee has involved children and wanted me to know the name and contact number of her local daughter, in case Mrs. McGee has to leave her house unexpectedly. Mrs. McGee also recounted how a temporary disability of rehabilitating her knee left her contemplating how to negotiate her home’s stairs.

Mary Douglas argues that Mauss’ work on *The Gift* recorded an entire credit structure of a community (1990, p. x). Applying the concept of gift-giving to this project, I argue that moving is one moment in a family’s history; obligations come after the move and also before it.

⁴ E. Summerson Carr explained the project in terms of Russian dolls, where homes contain collections of objects, and each object in the collection could be evaluated and circulated.

This project incorporates two suggestions by Mary Douglas on ways to further work on gift-giving. First of all, this study, set in the immediate aftermath of the global financial crisis in the Midwestern United States, applies the concept of gift-giving to a “contemporary, industrial society” (p. xv). Second, it applies the concept to ourselves (p. xv).

The same principles of gift-giving are evident in this study of ourselves. This is a study of ourselves in a few ways; first it traces the study of families in contemporary times. Families in the new millennium face the consequences of extended longevity where older adulthood may last multiple decades. Families also face the global consequences of the nuclearization and urbanization of families where family members may not reside near older adults.

In addition, housing for older adults is also in flux. Intergenerational living is not presumed, given trends mentioned above. Thus, these contexts create the possibility that a move by older adults can become a gift. But this gift comes with both an obligation to accept a gift such as a move of an older adult near an adult child and an obligation to reciprocate in the future. Lastly, it is a study of ourselves as it explores what it means to be human and to care for those who, in the past, cared for us. This study explores older adults’ acts of caring by voluntarily planning for the future through moving. In turn, family members obligatorily reciprocate by caring for those who cared for them previously. Follow-up studies can continue to trace the impact on “ourselves” of moving as a gift.

8.4.2 Other Contributions for Anthropology: Kinship, Temporalities and Material Culture

In addition to its contributions to the gift-giving literature, there are three other contributions that this project makes. First, this project shows the ways kinship ties are strengthened through gift-giving. The complexities of building kin relations are evidenced here,

despite the challenges of such a gift. In this study, older adults often made their decisions in light of their relationships with their family members. Older adults chose to relocate near kin after many years of living far from them, and older adults chose to seek their advice and assistance at all stages of the moving process, from choosing a residence to personalizing it, to the packing and unpacking of possessions. Post-move, older adults involved kin in numerous ways such as relying on them for companionship and transportation. All these moving and post-move interactions between older adults maintain kin networks. This work supports recent scholarship on the importance of intergenerational kin relationships in American society despite trends such as marital instability in American society (Swartz 2009). In this study, participants are actively sustaining their relationships. Moving becomes a focal point to involve kin and to reassess and redefine roles within a kin network. Though perhaps at times the reassessment is difficult, older adults and their kin work hard in different ways to adjust to inhabiting these new roles.

Second, the project features the extensions of temporalities in the concept of a gift from a past-self to a future-self; one's relationship with one's self is an important social relationship to maintain and nurture. The ways activities and contexts shape the way the self presents itself has long been an interest in anthropology (see Goffman, 1981). Goffman also explored the ways institutions themselves shape the behaviors of an individual, where some roles are severed upon entering institutions and new roles are inhabited (1968). In this project where many individuals moved to retirement communities, they worked to understand their lives within institutional spaces. They imagined future selves and examined what activities and roles would accompany the transition. By addressing how they imagine their future selves, this project adds the context of time to understanding the actions and motivations of older adults.

As this project also explored the divestiture of one's home and the creation of a new home, this project addresses the anthropological field of material culture. As participants analyzed their consumption, wondering why they owned so many objects, they explicitly and implicitly contemplated the meanings of ownership in American culture. With a focus both on the individual objects as well as the personalization of a new dwelling, the project contributes to our understanding of what is valued by older Americans and their family members. The study also shows the role of objects in kin relationships (Marcoux 2000, Parkin 2001). For example, as adult children inherit the objects from the older adults, they must make accommodation for the objects in their homes. We also saw the relationships between buyers and sellers of homes and objects, relationships that entail exploring the lifecycle of objects that may oscillate between market commodification and exchange systems premised on personal value systems (Zelizer 1994, Kopytoff 1986).

8.5. Contributions to Social Work

8.5.1 Intersections of Gift-giving and Social Work

Social workers can learn much from theories of gift-giving. In fact, Marcel Mauss also applies the concept of gifts to charity and social insurance. He distinguishes between a donation and a gift in that for the latter, the donor does wish to receive gifts in turn. However, charity is viewed as a gift, placing the individual and greater society in dialogue. He concludes *The Gift* by addressing this conversation. The individual works, contributing to society in labor and taxes. Thus Mauss asserts, "the state itself, representing the community, owes him, as do his employers, together with some assistance from himself, a certain security in life, against unemployment, sickness, old age, and death" (p. 67). In other words, the obligations between an

individual and community are continually being reciprocated over time. These obligations are often the interest of social workers that may be employed by local, state and federal agencies. As social workers strive for equality and social justice, they evaluate and advocate for the obligations of a community to an individual. They also support individuals in understanding their obligations to their community. Therefore, social work as a profession is a profession of gift-giving. Importantly, a “gift that does nothing to enhance solidarity is a contradiction” (Mauss, 1990, p. viii). An individual who receives gifts, whether counseling or financial assistance, is expected to show enhanced solidarity in terms of conforming to societal norms and regulations.

Social workers may work with older adults and their families as they consider and plan their moves. For this project, social norms encouraged by social workers may be focused on taking individual responsibility for one’s aging by anticipating one’s housing needs. However, older adults vary in the abilities, skills, knowledge and resources they have available to address their housing needs.

8.5.2 Implications for Social Work Practice

This project informs practitioners on housing transitions for older adults. Social workers interacting with older adults will have some clients who are contemplating housing needs. These examinations may include questioning the suitability of their current home, the possibility and feasibility of home modifications, and the possibility of a housing transition.

Frontline practitioners need to understand what is at stake in leaving one’s home. They need skills for discussing housing transitions, as well as knowledge about available and affordable housing options. They also need to know what community-based services are

available, and their costs. Practitioners can also talk with older adults about unexpected adjustments to living with age-graded peers. This study provides case examples that illuminate the experiences of older Americans in making these decisions.

The network approach to this project will also inform practitioners working with older adults' kin. Older adults and their family members may view timelines and work to be done in a certain time frame differently. By understanding the emotional stress and labor that goes into the move, practitioners can help kin holistically grasp the slow pace of the move. While I argue that the move is framed as a gift, I also argue that the kin network may need to readjust its expectations during the move.

Social work practitioners can become involved in each stage of housing transitions. Before moving, social workers can help older adults and their kin examine the benefits and challenges in remaining in their homes or moving. They can also broker resources such as community agencies tasked with providing home modifications for older adults, such as installing grab bars or ramps. They can also broker resources for maintenance, such as church or community groups who want to support older adults by helping with lawn maintenance and snow shoveling. Lastly, they can broker home- and community-based services designed to support activities of daily living, such as home help services, meal delivery and transportation. However, social workers need to be able to discuss the financial implications of remaining in one's home or moving.

Many communities in the United States have agencies that support the housing needs of older adults. In some communities, social service providers offer seminars and fairs for older adults, which highlight senior housing available and also ways to modify their homes. Sometimes, affordability of various housing options, including remaining in one's home,

modifying and relocating, is also addressed. Some community service providers also offer home-sharing matching services that enable older adults to remain in their homes with roommates who may provide some assistance in exchange for reduced or free rent.

For those who choose to move, social workers may support the emotional and logistical needs of older adults as they make a multitude of decisions about where to move, and how to move. Realizing that older adults may not have moved in a long time, some agencies offer seminars on divesting of one's possessions, both emotionally and logistically.

Also, social workers may broker resources of volunteer groups who wish to aid older adults in moving tasks. While resources for moving exist in some communities, social workers may also have to organize groups who wish to help older adults by supporting moves within the scope of their pre-existing activities.

While subsidized housing exists in many communities for older adults with lower incomes, subsidies might be created and distributed by social service agencies to support the costs of moving. To date, I have not encountered formal systems in social service agencies to apply for these expenses. It is possible that informally, these costs are subsidized in various communities through discretionary funds.

Post-move, social workers can help with adjustment concerns in new housing and new communities. Social workers can also help older adults and family members process their losses.

8.5.3 Implications for Social Work Policy

Many Americans face these transitions. In 2005, there were 1.46 million Americans in long-term care nursing facilities (AARP, 2006, p. 10). While only 3.5% of people ages 65 and older reside in nursing facilities, researchers project the number of Americans over 65 to increase

in the upcoming years. The population of those 65 and older will increase by 48% in the next fifteen years and the population of those Americans 85 and older will increase by 43% (AARP, 2006, p. 6). Thus, the provision of long-term care will continue to be of interest to many families.

Historically, residential long-term care has been used primarily by Caucasian Americans. Other ethnic groups have relied on family care or small boarding houses rather than large congregate housing options (Miner, 1995; Mui and Burnette, 1994). Underutilization of long-term care residential services as well as community-based services by minority elders have led scholars to consider differential thinking about familial and paid support. In “Racial Differences in Family Support and Formal Service Utilization Among Older Persons: A Nonrecursive Model,” Sonia Miner found that whites in her study were able to “substitute” formal services for informal (i.e. family) care. However, formal service use among African Americans was not associated with lower use of informal services. While the paradigm of “substitution” may index a whole set of other meanings about kin relations and privacy, perhaps the formal services are economically out of reach for many types of older people, including racial minorities. In the future, the population of older Americans age 65 and older will be more diverse; already almost 20% of Americans this age already identify as Hispanic or non-White (AARP, 2006, p. 7). Providers of community based services and residential options for older Americans continue to be challenged about inclusion in terms of racial, religious and ethnic diversity, as well as socioeconomic diversity.⁵

⁵ During my fieldwork in April 2011, there was an article in the town newspaper entitled, “(NAME OF FACILITY) provides upscale housing option for the active senior.” The article highlights the interconnectedness of the residents who help each other think through the challenge of how to move out of their primary houses. In fact, while the retirement community has regularly held seminars on staging homes and selling homes, a staff member says in the article that “it’s the current residents who really help the [prospective] ones. ‘They’re a great resource.’” She goes on to add that “they’re bonding on the same journey.” The article presents information about layout of cottages,

As a nation, a state and a community, we need to continue to examine what types of older adult housing is needed to meet present demand and future projections. While this study focused on the moving transitions of many resource-rich older adults, it is important to plan and build housing choices for those across the socioeconomic spectrum. Social workers need to advocate for housing policy in three important ways: 1) affordability of senior housing for varying socioeconomic backgrounds and 2) evaluating the housing needs of older adults and 3) increasing diversity in long-term care.

upgrades available in the individual houses and amenities in the clubhouse. What is striking about the on-line article are the comments posted by readers.

Of the eight comments posted, there were three themes: 1) content of article 2) affordability 3) age stratification. First of all, two of the posts questioned whether documented the offerings of a retirement community would be considered newsworthy. Thus, the commenter invokes an understanding of two genres, journalistic writing and advertising, when stating, "This is not news. It's a glorified advertisement. (NAME OF NEWSPAPER) your losing me here (sic)." Another reader questions, "Is this an ad?" The majority of comments refer to the costs of the housing; one commenter said, "Dual societies, even to the end. Help us." This reader creates two groups of persons, referring to two different tracks for housing opportunities until the end of life. Another reader cites geographical differences in his/her comment "\$2500.00 plus per month on top of a huge mortgage payment. Maybe in (OTHER TOWN) or the points of (OTHER TOWN). Way, Way over priced for this area. And all those trees they cut down. Seniors need affordable housing not a taj mahal." This reader asserts that the price point is not compatible with older adults who reside in the said location. This brings in the question of who is this housing for, persons from the area or persons who are related to persons from the area. The invoking of location is evident in the next comment, but here the reader invokes location of the retirement community as well as the location, or rather co-location of units. The reader notes, "Way overpriced and terrible location, this development will tank out. Might as well live in an apartment complex, too close for comfort." One commenter juxtaposes reasons 1 and 2 by stating, "This is one more example of an overpriced complex that will benefit the rich developers. We need AFFORDABLE senior housing, not more upscale housing for rich people and rich developers. Get real. This country is going bankrupt and many seniors on fixed incomes are the losers, along with the middle class. Build some affordable housing, for people living on Social Security, and then write and article advertising it." Lastly, one remark questions the age stratification approach of the housing development and yet ends by dealing specifically with the mortality of a resident. The reader says, "For \$122K these are the types of homes that young professional needs just starting off in their careers. Is the land really that high in (NAME OF TOWN) that homes like these can't be built for a profit? Why does it take the "golden years" for homes like these to be available? With prices like these, it's much better than what \$60K buys at the [Name of Condominium Complex], or, \$90-110K at the former apartments on [Name of Street], or even [Name of Condominium Complex]! But then again, an association fee of \$2200-2800 ouch! LOL, the "Life Lease", "...once a resident leaves" does this really mean "when a resident dies?" So the percentage that if refundable is contingent upon how long you live!"

There are 23 Federal agencies that provide approximately 943,000 housing units⁶ to older Americans with low incomes.⁷ In fact, according to the General Accounting Office, 66% of low-income older Americans who rented their housing spent more than 30% of their income on housing (2005, p. 1). Also, forty percent of low-income homeowners spend more than 30% of their income on housing (2005, p. 1). Housing affordability is a crucial concern for older Americans who are also planning for health care costs and other expenses.

One concern is the availability of affordable housing units. Social workers should advocate for the continued availability of affordable senior housing in a community. Communities could examine and create the funding mechanisms available to older adults beyond their own savings for senior housing. Other countries offer savings accounts for health care expenditures that older adults and family members can also contribute to. For example, the Medisave component of the Central Provident Fund in Singapore offers opportunities for family members to contribute to the healthcare needs of older adults. In addition to allowing the fund to be used at medical institutions in different countries, the government is contemplating allowing Medisave to be applied to nursing home care (Ramesh and Majid, 2009). Family member support, in addition to older adult financial support, could be an additional way to help pay for the housing needs of older adults.

The Affordable Care Act passed in 2010 also has components that could be used to support the housing needs of older Adults. It includes measures to keep seniors in their homes such as the Community First Choice funding for states that implement programs to help older adults make community living a first choice supporting choices other than residential facilities

⁶ This number reflects only those units designated for older adults. The General Accounting Office suggests that 1.4 million units are occupied by low-income older adults but are technically undesignated for older persons.

⁷ The General Accounting Office considers low-income elderly to be those whose incomes are less than 80 percent of the median income in a community.

(Health and Human Services, 2011). This may help seniors return to living in their homes or support them staying in their homes. While support for home and community based programs for seniors' housing continues to be a need, complementary support for those older adults for whom relocation will improve their health and well-being should be considered, factoring in concerns of safety in both homes themselves and neighborhoods where older adults live. Another component of the Affordable Care Act is CLASS or Community Living Assistance Services and Supports, a voluntary long-term care insurance program. However, the Secretary of Health and Human Services, Kathleen Sibelius, reported on October 14, 2011 that the viability of the program is not evident (U.S. Department of Health and Human Services, 2012). Social workers can advocate for this program or a similar program which would provide assurances for long-term care needs of older Americans.

Second, older Americans should be given support to understand their housing needs. Another component of the Affordable Care Act is that every older American is entitled to a wellness visit for preventive care. Given the serious concerns of older adults' risky interactions with the built environment, e.g. falls, advocates could suggest an assessment of housing needs be added as a free screening component⁸ offered at the wellness visit. This screening could help link older Adults with home and community based services, provide information about home modifications and assess if it is in the best interest of a certain minority of older Americans to move to long-term care. Second, attention can be paid to helping older Americans understand the assets that they do have as part of supporting their understanding of their housing needs. Supporting initiatives on a local, state and federal level that support programs for financial literacy may help older Americans plan for their housing needs.

⁸ There are several other screenings deemed free in the act like bone mass measurement and diabetes.

Third, the diversity of older adults using Long-Term Care in the United States can be enhanced in several ways. First, we need to advocate for creating and supporting environments where residents of all backgrounds feel that they can have their needs met in long-term care. For example, diversity in terms of sexual orientation leads to sensitivity regarding housing and visitation arrangements, which might require state and facility level policy changes. On a state level, domestic partner benefits available in some states assure financial and visitation rights to partners in hospital and nursing homes (NCLR, 2011).

In general, as our nation's older population increases, relocations of older adults will most probably increase. Social workers can advocate for affordable housing, support for understanding housing needs, and housing policies that account for the ever-diversifying older adult population in the United States. Researchers can continue to analyze the housing experiences of older adults, whether they choose to age in place or relocate.

8.6 Future Directions for Research

This research could be taken in several future directions based on the limitations discussed above. First, future research on housing transitions should address more diverse older adult populations. Socioeconomic variation as well as racial and ethnic diversity may yield different understandings of the moving process. Also, more nuanced understandings of moving experiences of young old, middle old and oldest old, as defined by gerontological scholars, would help us better understand timing of moves in accordance with other chronological or developmental milestones in the aging process.

Future research could also explore the relocations of older adults when they cannot plan their moves. Studying moves that occur in times of crisis would complement this research that

followed movers who had much time to plan their moves. Attention to moves that are driven by adult children, where older adults' roles diminish, would also complement this research

8.7 Concluding Remarks

While participating in this project, many study participants discussed the challenging issues of aging. Several couples interviewed spoke openly about the possibility of one spouse dying before the other, and talked about their move as a way to ensure the remaining spouse will not be left to deal with houses and possessions. Several husbands say that they are moving for their wives, assuming their mortality to be more imminent due to gender or health concerns.

Mr. Paul's plan of moving out of his home illustrates the interpersonal nature of the SOC model in the fact that he moved for his wife. To optimize his wife's life, should he pass first, they are selecting living in a less demanding environment compensate for both their current challenge of maintaining their home now, and the perceived future challenge for his wife of maintaining their home upon his death. He expresses great sadness on leaving his home, which illustrates to his wife and their children that his decision to move is a gift. He and his wife have chosen to move to a place where professionals may later assist or "compensate" by providing home maintenance, meals and housekeeping. Moreover, Mr. Paul's move also demonstrates that the SOC model may take many years to exhibit how the selection of living in a less demanding environment to achieve the goal of maintaining one's independence may optimize his wife's life. Scholars continually cite the need to document how the SOC unfolds in practice and document whether strategies to optimize their lives are explicitly mentioned by persons (Marsiske et al., 1995). This research on moving, with longitudinal possibilities, opens up new ways to consider the SOC model. In understanding the SOC model over time, we can also understand the

meaning of moving as obligatory cycles of gift-giving, fraught with obligations, complicated with benefits and disadvantages, but nevertheless, expressions of love.

Appendix One

Survey Instrument for Semi-Structured Interviews with Primary Participants

(Family of topics to be discussed during interviews with primary participants)

There will be three interviews with each primary participant.

Background Questions

1. 1) For singles: What is your name?
For couples: What are your names?
How long have you been together?

1. 2) How long have you lived at your current residence?
2. 3) Do you own or rent?
3. 4) How many square feet is this residence?

History of Moves

1. 5) Can you please describe your experiences with moving? What years did you move? What types of houses were they? Did you own or rent?

Pre-Move Planning (1st Interview Conducted at Least 2 Months Before Move)

A. Moving Process:

1. 1) How long have you been planning your move?
2. 2) How did you select where you to move?
3. 3) How did you decide when you will move?
4. 4) What are your concerns about the move?

5. 5) Who is involved in the move?
6. 6) How are responsibilities divided among individuals?

B. Possessions:

1. 1) What will you take to the (name of community)?
2. 2) What will you sell? How will you sell them?
3. 3) What will you give away? To family? To friends?
4. 4) How will you decide who will receive the possessions?
5. 5) What possessions are you unwilling to give up?
6. 6) What are your most prized possessions?

C. Economic Context: Assets/Finances/Uncertainty:

1. 1) Do you need to sell assets (home, car) in order to move? To pay for your move?
2. 2) How will you finance your monthly expenses?
3. 3) How has the current economic climate affected your decision to move? The way you plan to pay for your move?
4. 4) What are your concerns about the future financially? More specifically, how do you feel about your financial future?

D. Support Network Members:

1. 1) Who do you consider to be part of your family? Who do you consider to be most involved in your move?
2. 2) Are close friends involved in your move?
3. 3) Have you had family members or friends move to senior residences? What did you learn from their experiences? Are you planning your move differently or similarly to their moving experience? In what ways?

4. 4) Have you had family members or friends who had to plan for their possessions during the move? What did you learn from their experiences?
5. 5) Have you involved other professionals in the move?
6. 6) Have you consulted professionals about the *process of moving*? What types of professionals? Please describe your experience(s). How satisfied have you been?
7. 7) Have you consulted professionals about what to do with your possessions? What types of professionals? Please describe your experience(s). How satisfied have you been?
8. 8) Have you consulted the staff of the (name of independent living community) about your move or your possessions? In what ways? Please describe your experience(s). How satisfied have you been?

E. Talk/Conversations

For Research Question 2a

1. 1) With whom are you talking about your move?
2. 2) Have you found it difficult to talk about this move with your family? Your friends? Others? Why?
3. 3) With whom are you talking about what to do with your possessions?
4. 4) Have you found it difficult to talk about what to do with your possessions with your family? Your friends? Others? Why?
5. 5) Have you had any difficulty talking about your move with professionals? Why or why not?
6. 6) Have you had any difficulty talking about your possessions with professionals? Why or why not?

For Research Question 2b

1. 7) Have you noticed anything about your relatives speaking in certain ways when talking about the move?
2. 8) Have you noticed that you speak in certain ways when talking about the move?

F. Health Status:

1. 1) What health conditions precipitated the move to (name of independent living community)?
2. 2) Who decided that it was time for you to move to a senior retirement community? Was it your choice? If so, what were your reasons? If it was not your choice, what were the reasons?

Do you agree with the reasons?
1. 3) What made living in your home/apartment challenging?

Were you being helped at home by family members? Home care or other professionals?

G. Anticipated Impact of Moving

SOC Model for Research Questions 1a and 1b

1. 1) How do you think choosing to move at this time in your life will optimize your current functioning in day-to-day activities?
2. 2) How do you think choosing to move at this time will optimize your future functioning in day-to-day activities?
3. 3) How do you feel your move will compensate for any other losses you are currently facing?
4. 4) How do you feel your move will compensate for any losses that may happen in the future?

Move In-Process (2nd Interview Conducted Within 2 Weeks of the Move)

H. Moving Day Logistics:

1. 1) Who will be involved/was involved in moving day?
2. 2) Are there plans about the move you had made that have had to change recently?
3. 3) Are there plans about your possessions that you had made that have had to change recently?
4. 4) What are some challenges you anticipate/or anticipated in moving?
5. 5) Emotionally, how are you feeling about the move?
6. 6) Do you think everything you are bringing will fit into your new unit?

Post-Move Adjustment (3rd Interview Conducted 1 Month After the Move)

I. New Residence:

1. 1) How do you feel about your new residence?
2. 2) How do you feel about the features you requested for your unit?
3. 3) Do you wish you had asked for other customized features for your unit? Why or why not?

J. Possessions:

1. 1) How have you arranged your possessions? What fit? What didn't?
2. 2) What do you wish you had brought? What did you bring that you wish you had not?
3. 3) Have you had any trouble with theft?
4. 4) Have you given any of your possessions as gifts to other residents? Staff members?

5. 5) Are your possessions stored elsewhere e.g. storage units?

K. Impact of Moving on Well-Being:

1. 1) Reflecting back, what has moving meant to you?
2. 2) How has this been for you?
3. 3) How has your situation changed or remained the same?

SOC Model for Research Questions 1a and 1b

1. 4) How has selecting moving at this time in your life optimized your current functioning in day-to-day activities?
2. 5) How has selecting moving at this time optimized your future functioning in day-to-day activities?
3. 6) Do you feel your move has compensated any other losses you are currently facing?
4. 7) Do you feel your move compensates for any losses that may happen in the future?

Appendix Two

Survey Instrument for Semi-Structured Interviews with Members of Kin Network

(Family of topics to be discussed during interviews with interviews with kin)

This interview will take place before move occurs.

Note: X will be replaced with name of person moving to the independence living community

Background Questions

1. 1) What is your name?
2. 2) What is your relationship to X?
3. 3) How involved have you been in X's move?

Pre-Move Planning

A. Moving Process:

1. 1) How did X select where X will go?
2. 2) How will X decide when X will move?
3. 3) Who is involved in the move?
4. 4) What are X's concerns about the move?
5. 5) What are your concerns about the move?
6. 6) How are responsibilities divided among individuals?

B. Possessions:

- 1) What will X take to (name of independent living community)?

- 2) What will X sell? How will X sell them?
- 3) What will X give away? To family? To friends?
- 4) How will X decide who will receive the possessions?
- 5) What possessions is X unwilling to give up?
- 6) What are X's most prized possessions?
- 7) What do you think you will receive from X?
- 8) What do you think you should receive from X?
- 9) Have you been able to talk with X about what you would like?

C. Economic Context: Assets/Finances/Uncertainty:

1. 1) Did/does X need to sell assets (home, car) in order to move? To pay for X's move?
2. 2) How will X finance his/her monthly expenses?
3. 3) Did you contribute financially to the move, the downpayment or will you contribute to monthly expenses?
4. 4) How has the current economic climate affected X's decision to move? The way X plans to pay for X's move? The way X plans to pay for his/her monthly expenses? The way you are planning to contribute financially?
5. 5) What are your concerns about the future financially? More specifically, what are your concerns about your financial future?

D. Support Network:

1. 1) Who do you consider to be part of X's family?
2. 2) Are close friends involved in X's move?
3. 3) Have you had family members or friends move to senior residences?? What did

you learn from their experiences?

4. 4) Have you had family members or friends who had to plan for their possessions during the move? What did you learn from their experiences?

E. Talk/Conversations:

For Research Question 2a

1. 1) Who are you talking with about X's move?
2. 2) Have you found it difficult to talk about X's move with your family? Your friends? Others? Why?
3. 3) Who are you talking with about what to do with X's possessions?
4. 4) Have you found it difficult to talk about what to do with your possessions with your family? Your friends? Others? Why?
5. 5) Have you consulted professionals about the process of moving? Who?
6. 6) Have you consulted professionals about what to do with your possessions? Who?

For Research Question 2b

1. 7) Have you noticed anything about you or your relatives speaking in certain ways when talking about the move?
2. 8) Have you noticed that X speaks in certain ways when talking about the move?

F. Health Status:

1. 1) What health conditions precipitated the move of X to (name of independent living community)?
2. 2) Who decided that it was time for X to move to an independent living community? Was it X's choice? If so, what were your reasons? If it was not X's choice,

what were the reasons? Do you agree with the reasons?

3. 3) What made living in X's home/apartment challenging?

Was X being helped at home by family members? Home care or other professionals?

How often were you helping X? In what ways were you helping X?

G. Anticipated Impact of Moving

SOC Model for Research Questions 1a and 1b

1. 1) In what ways, do you think X anticipates that moving at this time in his/her lives will optimize his/her current functioning in day-to-day activities?
2. 2) In what ways, do you think X anticipates that moving at this time in his/her lives will optimize his/her future functioning in day-to-day activities?
3. 3) In what ways, do you think X anticipates that moving will compensate for any other losses that he/she is currently facing?
4. 4) In what ways, do you think X anticipates that moving will compensate for any other losses that he/she may face in the future?

Move In-Process

H. Moving Day Logistics:

1. 1) Who will be involved in moving day? Will you be involved? If so, how?
2. 2) Are there plans about X's move that have had to change recently?
3. 3) Are there plans about X's possessions that you had made that have had to change recently?
4. 4) What are some challenges you anticipate/or anticipated in moving for X? for yourself

5. 5) Emotionally, how are you feeling about the move?
6. 6) Do you think everything you are bringing will fit into your new unit?

Post-Move Adjustment

I. New Residence:

1. 1) How do you feel about X's new residence?
2. 2) How do you feel about the features X requested for his/her unit?
3. 3) Do you wish X had asked for other customized features for your unit? Why or why not?
4. 4) How do you think X will adjust to his/her home?

J. Possessions:

1. 1) How will X arrange his/her possessions? What will fit? What do you think will not fit?
2. 2) How involved will you be in unpacking and/or organizing possessions? Hanging possessions?
3. 3) What do you think X will wish he/she would have brought or not brought?
4. 4) Do you think X will have any trouble with theft?
5. 5) Do you think X will give any of possessions as gifts to other residents? Staff members?
6. 6) Are X's possessions going to be stored elsewhere e.g. storage units?

K. Impact of Moving on Well-Being:

1. 1) What will X's moving mean to him/her?
2. 2) What will X's move mean to you? How has this been for you?

3. 3) How will your situation changed or remained the same?

SOC Model Questions for Research Questions 1a and 1b

1. 4) How has choosing to move at this time in X's life will optimize his/her current functioning in day-to-day activities?
2. 5) How do you think choosing to move at this time in X's life will optimize future functioning in day-to-day activities?
3. 6) Do you feel X's move will compensate for any other losses that X is currently facing? If yes, how? If not, why not?
4. 7) Do you feel X's move will compensates for any losses that may happen in the future? If yes, how?

If not, why not?

Appendix Three

Survey Instrument for Semi-Structured Interviews with Professionals who Work at the Independent Living Community

(Family of topics to be discussed during interviews with professionals)

Background Questions

1. 1) What is your name?
2. 2) What is your position at (name of independent living community)?
3. 3) How long have you been at your current position?
4. 4) Have you ever worked at other residential community(ies) for older adults? In what position(s)? For how long?

Pre-Move Planning

A. Moving Process:

1. 1) In your experiences, who is typically involved in the move?
2. 2) In your experiences, how are responsibilities typically divided among individuals?
3. 3) In your experiences, how do people typically select where to move?
4. 4) In your experiences, how do people typically select when to move?
5. 5) In your experiences, what are people's key concerns about moving?

B. Possessions:

1. 1) In your experiences, what do people typically take to an independent living

community?

2. 2) In your experiences, what do people typically sell?
3. 3) In your experiences, what do people typically give away? To whom do they give things?
4. 4) In your experiences, how do people decide who will receive certain possessions?
5. 5) In your experiences, what possessions are people unwilling to give up?
6. 6) In your experiences, what are people's most prized possessions?

C. Economic Context: Assets/Finances/Uncertainty:

1. 1) In your experiences, did/does people need to sell assets (home, car) in order to move? To pay for X's move?
2. 2) In your experiences, how do people typically finance living in independent living communities?
3. 3) In your experiences, how has the current economic climate affected people's decisions to move? The way they planned to pay for their moved? The way others plan to pay for their loved one's stay in independent living communities?
4. 4) In your experiences, what are your concerns about the future financially?
5. 5) How do your marketing materials present the costs of living at (name of community)?
6. 6) Are you changing your marketing materials to reflect the current economic condition?

D. Support Network:

1. 1) In your experiences, how are family members involved in moves?
2. 2) In your experiences, how are friends involved in moves?

3. 3) In your experiences, how do experiences or stories of moves of residents' relatives affect moves of new residents?
4. 4) In your experiences, how do experiences or stories of moves of residents' friends or peers affect moves of new residents?

E. Talk/Conversations

For Research Question 2a

1. 1) How do people talk about their moves?
2. 2) With whom do they talk about this?
3. 3) How do people talk about their possessions?
4. 4) With whom do they talk about this?
5. 5) Can you give me some examples of the topics that you talk about with future residents?
6. 6) Can you give me some examples of the topics that you talk about with the relatives of future residents?

For research question 2b

7. 7) Have you noticed anything about how residents' speak when talking about their moves?
8. 8) Have you noticed that older people speak in certain ways when talking about the moves?

F. Health Status:

1. 1) In your experiences, what health conditions precipitate the moves to independent living communities?

G. Anticipated Impact of Moving

SOC Model for Research Questions 1a and 1b

1. 5) In what ways, do you think residents anticipate that moving at this time in their lives will optimize their current functioning in day-to-day activities?
2. 6) In what ways, do you think residents anticipate that moving at this time in their lives will optimize their future functioning in day-to-day activities?
3. 7) In what ways, do you think residents anticipate that moving will compensate for any other losses that they are currently facing?
4. 8) In what ways, do you think residents anticipate that moving will compensate for any other losses that may happen in the future to residents?

Move In-Process

H. Moving Day Logistics:

1. 1) In your experiences, who is typically involved in moving day?
2. 2) In your experiences, are there plans that change very close to the move? If so, what are they?
3. 3) In your experiences, are there plans about residents' possessions that change very close to the move?
4. 4) In your experiences, what are some challenges new residents experience during moving day?
5. 5) In your experiences, what are some challenges residents' kin experience during moving day?
6. 6) In your experiences, emotionally, how do residents feel on moving day?
7. 7) In your experiences, emotionally, how do residents' kin feel on moving day?

8. 8) In your experiences, are people able to judge what will fit into their units? Can you please describe a situation where you've seen this judgment work? Can you please describe a situation where you've seen this judgment not work?

Post-Move Adjustment

I. New Residence:

1. 1) In your experiences, how do residents feel about their new residences?
2. 2) In your experiences, how do you feel about the features you requested for your unit?
3. 3) In your experiences, what are some features that residents wished they had requested?

J. Possessions:

1. 1) In your experiences, do residents' possessions fit in their new residences?
2. 2) In your experiences, what do residents wish they had brought? What did residents bring that they wish you had not?
3. 3) In your experiences, have residents had any trouble with theft?
4. 4) In your experiences, have residents given any of their possessions as gifts to other residents? To Staff members?
5. 5) In your experiences, are residents' possessions stored elsewhere e.g. storage units?

K. Anticipated Impact of Moving on Well-Being:

1. 1) In your experiences, what has moving meant to residents?
2. 2) In your experiences, how have some of their situations changed

3. 3) In your experiences, how have some of their situations remained the same? How have residents been able to stay connected to their former communities?

SOC Model for Research Questions 1a and 1b

1. 4) How do you think choosing to move at this time in your life will optimize the current functioning of residents in their day-to-day activities?
2. 5) How do you think choosing to move at this time will optimize the future functioning of residents in their day-to-day activities?
3. 6) How do you feel moving compensates for any other losses that residents are currently facing?
4. 7) How do you feel moving will compensate for any losses that may happen in the future?

Appendix Four

Contextual Background: Long-Term Care System in the United States

Experiences of aging vary. Some older adults need assistance with completing basic everyday tasks involving personal hygiene, eating and/or meal preparation. These activities, often named activities of daily living (ADLs) or instrumental activities of daily living (IADLs) can be supported by family members, neighbors or paid caregivers. Those who require such assistance are defined as requiring long-term care.

For those who choose to receive long-term care assistance other than in their homes, the long-term care residential scene in the United States has evolved into options with differing medical and social supports.⁹ Residential options can range from independent living units such as small apartments in assisted living environments to single or shared rooms with medical intervention available. There are also wings of facilities specializing in dementia care. The transition to living in long-term care involves decisions about where to live as well as how to transition to living there.

The historical roots of long-term care in the United States offer an understanding of today's long term care milieu. In early American history, older persons resided with family members when they needed assistance. Andrew Achenbaum (1983) argues that old age was not even a segmented life stage in the Republican era. Life involved hardship for everyone and families worked together to meet their challenges. He suggests that a Romantic era followed, where older persons were viewed as having lived a full life on earth and waiting for a forthcoming afterlife (1983). In this era, old age was seen as a separate life stage and other family members valued the wisdom and values imparted by older persons. Older persons living

⁹ Importantly, this project follows older people and their families as they make strategic decisions about their needs and wants at the well end of this continuum of care.

with family was still the norm. Some communities provided assistance like wood or food, or even boarding in another community member's home to those elderly in need (Kaffenberger, 2000).

In the late 1800s, Americans realized some persons in society needed residential assistance. In certain communities, almshouses¹⁰ emerged for the poor, those with mental illness and older persons without family sustenance. This earliest form of long-term care assistance did not address any specialized needs of older persons. The number of older persons increased over time. For example, in 1923, the percentage of older persons living in almshouses increased from 33% in 1880 to 67% (Haber and Gratton, 1994 in Kaffenberger, 2000). As older persons became a majority population in almshouses, the reputation of almshouses as filthy paved the way for Progressive Era reforms for long-term care for older persons. Private homes for the aged often funded by charities, emerged (Kaffenberger, 2000).¹¹

Entrusting in private care for older persons, rather than in state and local government run almshouses, meant that systematic supports were lacking. In response, many state governments began to provide old age assistance. With this financial assistance, older persons needing residential care would purchase room, board and nursing services in boarding homes (Kaffenberger, 2000). With the passage of Social Security in 1935, persons over 65 were guaranteed monthly financial support. Kaffenberger (2000) explains, "The Social Security Acts were important to nursing homes because they would soon put more money in to the hands of older people, and they would not pay benefits to people in public facilities such as almshouses" (41). In fact, payments to public institutions were not allowed.

¹⁰ Almshouses are termed "poorhouses" by some researchers like Katz (1996).

¹¹ By 1920, needy persons were served by private homes and almshouses in approximately equal numbers (Kaffenberger, 2000).

The milieu of the nursing home industry continued to expand and differentiate. Ziemba et al. (2006) write, Although a well-intentioned strategy to starve poorhouses, this structure [title I of the Social Security Act] resulted in an exponential increase in the number of for-profit facilities catering to the increased numbers of older Americans with financial resources from the assistance programs. These facilities were built for the most part without regard to standards and without a guiding paradigm for long term care settings as differentiated from either poorhouses or hospital care (8).

The lack of guiding benchmarks and standards of care continues to affect the industry today. While the landscape of provision of residential care to older persons had changed from almshouses to privatized nursing homes, Achenbaum (1986) asserts, “the demise of one old-age institution, however, has not eliminated the sense of dread and fear elderly people feel as they enter the alternative fostered by social welfare programs” (151).

The Hill-Burton Act of 1946 was enacted to fund expansion of non-profit hospitals. In 1949, there was a proposal to extend the Act to include non-profit nursing homes. However, for-profit nursing home providers opposed this legislation, which was “the first active involvement of the nursing home industry in federal legislation” (Kaffenberger, 2000, 42). Later, in 1954, legislation extended Hill- Burton to fund nursing homes. However, this legislation did not strongly influence long-term care settings as many facilities, if they didn’t fit the legislative requirements of being associated with hospitals and built according to hospital-like standards, were built anyway (Ziemba, et al., 2006). Different types of facilities proliferated.

Regardless of the funding of the facilities, the public perception of long-term care focused on its relation to acute care. Ziemba et al. (2006) explain, “Constraining funds to

facilities meeting hospital-like building standards did little to distinguish either the setting or philosophy of long term care as being much different from hospital care. With a focus on building standards and duration of care, skilled nursing (or extended care) facilities were cast as extensions of the hospital environment with its medical model and culture” (8). Long-term care facilities should appear as clinical environments, with the emphasis on nursing services.

In the 1970s, individual choice and independent living became values that influenced the options older persons had when seeking residential long-term care. These movements coincided with other groups like people with disabilities, who were seeking individualized, less restrictive alternatives. One practice that came to be questioned was institutionalization of persons who required care. Emphasis on community-based services emerged. These services enabling older persons to age in place were also seen as more cost-effective. Also, alternatives were sought for those requiring institutional care (Ziembra et al., 2006). Alternatives to nursing home care such as assisted living facilities developed. These facilities emphasized a more socially-based long-term care model. The Assisted Living Quality Coalition has defined assisted living facilities as “a congregate residential setting that provides or coordinates personal services, 24-hour supervision and assistance...designed to maximize residents’ dignity, autonomy, privacy independence and safety...” (Hawes et al., 2003, 875). These more socially-based models also aesthetically distinguished themselves from nursing homes as more attention was paid to living space, promotion of privacy¹² and environmental autonomy,¹³ with apartments or rooms with private or semi-private bathrooms available (Phillips et al., 2000). The Assisted Living Industry also promotes its commitment to “aging in place” with services added as needed. However, in

¹² In their study, one criterion for privacy is whether a person shares a bath with an unrelated person.

¹³ In their study, some criteria for environmental autonomy and control are the ability to lock one’s door, regulate room temperature, and choose some food items by having a refrigerator or microwave.

an important review of the Assisted Living Industry, the possibilities for older persons in place “seems more likely to be a product of facility choices about the resident mix they wish to serve and the market ‘niche’ they wish to occupy” (Hawes et al., 2003, 882). The residential long-term care choices in this country have also expanded within the nursing home industry also proposing more home-like options such as the Eden alternatives.¹⁴

Along with the attention to social needs of older people, individualization also became important. Some facilities permitted and even encouraged residents to bring possessions like photographs or furniture into the long-term care facility. Some scholars argued that the presence of one’s possessions might aid in the adjustment to long-term care (Lieberman and Tobin, 1983). Intertwined with taking some possessions to long-term care, depending on the space available to the residents, is the decision-making process that occurs during the relocation. Some objects would be taken; others would be given to family, sold or thrown away.

Personalizing one’s space in long-term care residences has become a growing in interest in long-term care. This includes bringing one’s possessions to long-term care settings, as some facilities encourage older people to bring items to represent their past experiences and loved ones. Sometimes these objects may be used in life reviews or reminiscence therapies in the long-term care setting. However, bringing one’s cherished items has not always been the norm. Additionally, personalizing space signifying one’s interests and expertise in the exterior (e.g. displays outside residences in hallway corridors and garden beds) and interior spaces (e.g. paint colors) is also a tactic utilized by marketing directors to make a place “like home.”

¹⁴ It is increasingly difficult to group or conceptualize what is envisioned as residential long-term care these days, due to varying standards by state and ranges of social and medical models as well as for-profit and government funding mechanisms.

Residential options for older adults continue to expand in the United States. Recently, Continuing Care Retirement Community (CCRC) models have developed, offering a continuum of care including independent living, assisted living, skilled nursing facilities and at times, specialized dementia services. In 2002, there were over 2200 CCRCs in the United States (US Census Bureau, 2004). CCRCs offer both support for active living as well as assurances of services if healthcare and instrumental support is needed (Sherwood et al., 1997). Research on CCRCs has established that residents choose such settings to be in charge of their moves, rather than face moving in acute health crisis or death of a spouse (Krout et al., 2002). Older adults often choose to move into CCRCs before acute health events or death of a spouse occurs (Sherwood et al., 1997). Many of the movers in this study moved to CCRCs for the reasons outlined above.

The options available in this new millennium continue to diversify. Around the United States, older persons are providing input and demanding a variety of housing. For example, the Eden-Alternative is a recent movement where older adults contribute as well as receive care in a “human habitat where life revolves around close and continuing contact with plants, animals, and children” (Eden Alternative website). Another interesting development is providing long-term care for LGBT populations as several scholars have documented that after years of being “out” in adulthood, transitions to long-term care sometimes require a choice to hide one’s sexual orientation (Gross, 2007). Long-term care providers are experimenting with the financing of facilities and whether for-profit, not-for-profit or other statuses best lead to an ability to provide care to different segments of the population.

Appendix Five

Moving Tasks Schedule

TENTATIVE MOVE SCHEDULE (Household Inventory May 2010)	
Original Real Estate Contract	6 July 2010
R.E. Photos/Exterior	Jul/Aug/Sep 2010
Inspection	14 Oct 2010
Downsizing Seminar	2 Dec 2010
Mtg/Realtor (Rob Ewing) Determine Price, etc.	11 Feb 2011
Sign Contract	17 Feb 2011
Staging Consultation	17 Feb 2011
House on Market	14 Mar 2011
House Sold/counter offer accepted	17 April 2011
Closing	27 March 2011, Fri.
Occupancy	6 June 2011, Mon.
Hallways	
• walls/ceiling dry wall cracks in tip hallway	Done
Kitchen	
• interior of cabinets/backsplash new shelf paper	✓
• Pack up cabinets	✓
• touch up - repair cracks/repair wall	Done
• repaint door/trim to white	Done
• painting - walls, new shelf paper	Done
Stairway	
• Paint lower walls	Done
• repair crack at light switch/top of stairs	Done
• Paint upper walls	✓

Appendix Six

Weekly Repair List for Two Months

MASTER REPAIR LIST - February/March 2011	
<ul style="list-style-type: none"> • South Bath <ul style="list-style-type: none"> • recaulk sink • paint clothes chute door • magnets on cabinet doors • surface repair of shelf in medicine cabinet 	Comp. Comp. Comp. Comp. 2/21/11
<ul style="list-style-type: none"> • North Bath <ul style="list-style-type: none"> • recaulk trim of shower at door • floor tile outside shower door • paint doors/storage cabinet • misc. trim around door - touch up paint 	Comp. 2/21/11 Comp. 2/17/11 Comp. 2/22/11 Comp. 3/2
<ul style="list-style-type: none"> • Master Bedroom <ul style="list-style-type: none"> • touch up paint closet doors • misc. trim around door - touch up paint • touch up in CL closet 	Comp. 2/23 Comp. 2/23 Comp. 2/23
<ul style="list-style-type: none"> • Dining Room <ul style="list-style-type: none"> • misc. corners - touch up paint • entry closet - seal knots/touch up paint • crack near entry door • install blind hold downs 	Comp. Comp. Comp.
<ul style="list-style-type: none"> • Hall Ways <ul style="list-style-type: none"> • caulk/paint dry wall cracks in n/s hallway 	Comp.
<ul style="list-style-type: none"> • Kitchen <ul style="list-style-type: none"> • interior of cabinets/wash, paint, new shelf paper • touch up cabinets • south wall - repair cracks/paint wall • repaint door/trim to garage • pantry - paint, new shelf paper 	✓ ✓ Comp. Comp.
<ul style="list-style-type: none"> • Stairway <ul style="list-style-type: none"> • paint lower walls • repair crack at light switch/top of stairs • paint upper walls 	Comp. Comp.

Appendix Seven

Family Room Furniture Inventory

FURNITURE INVENTORY Family Room		
1. Teak Wall Unit - Teak	✓	10'-7"W x 14 1/4"D x 70 1/2"H
2. Futon - Oak		6'-10"W x 3'-6"D x 33"H
3. End Table - Oak	✓	20"W x 23"D x 21"H
4. Round Coffee Table - Oak		30" DIA x 14"H
5. Work Table - Grey Laminate	✓	7'L x 24"W x 30"H
6. Floor Cabinets - Oak (4)	✓	19 3/4"W x 15 1/2"D x 24"H (Simple Door)
		31 1/2"W x " " (2 Door)
		19 3/4"W x " " (Simple Door)
		31 1/2"W x " " (4 DRN)
7. TV Stand - Blk	✓	31 1/2"W x 18"W x 19"H
8. TV		27"W x 20"D x 23"H
9. Carpet		9' x 11'
10. Table Lamps (2) (Matching)		31 1/2" H
11. Directors Chair (1)		
2. SHOWNING		
3. Metal Shelving Unit 9"W x 14 1/2"D x 71"H (6 shelves)		

F.R./S.

TLO #1, 8

OPTIONS

1. CUT 2" OFF LEGS OF GRAY WORK TBL.
2. RANGE G.W.T. 1 1/4"
3. SHORTEN OAK DESK BY 2" ? AND SHORTEN GWT LEGS BY 1 1/4"

FURNITURE INVENTORY
LAUNDRY ROOM

1. Round Laminate Table - White

42" D x 29" H

2. Freezer - Kelvinator

28" W x 25 1/2" D x 59 3/4" H

(To Stay) 3. Washer

(To Stay) 4. Dryer

5. Shelving

41" W x 5 = 17 LF
40" W x 4 = 13 LF
42 1/2" x 3 = 10.5 LF
41" x 5 = 17 LF
32" x 6 = 16 LF
(12") 6' x 2 = 12 LF
85.5 LF

6. oak Shelving

4 - 6' x 12" W

Storage Room

1. Shelving
Floor

127" x 2 = 21 LF
127" = 10.5 LF

2. Shelving
Floor

43" x 2 = 7 LF
58" x 4 = 4.5 LF

3. Metal Shelving Unit 3' W x 11 1/2" D x 71" H (5 SHELVES)

15 LF

Appendix Eight

Older Michiganiaan's Day Brochure

OMD 2010 Legislative Advocacy Platform

We urge Legislators and the Governor to:

Protect vulnerable seniors; Fund senior and long term care programs

No further cuts to Office of Services to the Aging programs like home delivered meals, in-home care, senior volunteers, and caregiver respite.

- Approve Governor's recommended \$14 million increase in the MI Choice home-based nursing home alternative.
- No further cuts to Medicaid health, mental health and nursing home providers.

Protect vulnerable seniors; pass Elder Abuse laws

- The 2006 Governor's Elder Abuse Task Force Report calls for the adoption of several laws that would enhance protection for vulnerable older adults. Not one piece of legislation implementing the recommendations has been passed by the Legislature.
- More than 20 elder abuse bills are before the legislature, and 8 bills have passed the House and are awaiting action in the Senate. These bills must pass.
- Protections needed by older adults include: require reporting by financial institutions of suspected abuse; increase penalties for abuse or exploitation; require court appointed guardians to be bonded; allow videotaped testimony; and allow courts to freeze assets when necessary to protect seniors' savings.

Invest in prevention programs that work

- Support Older Michiganiaans Act programs that prevent, delay, or divert dependence on costly Medicaid and institutional care.
- Expand financing for evidence-based wellness programs, offered by senior centers and other aging network organizations, that lower health care costs.

Make Michigan a retirement destination of choice

- Support legislation that creates communities that embrace an aging and disabled population. Seniors are a \$32 billion economic force in Michigan. Their economic contributions create jobs that will not leave the state. Their income is imported into the state's economy (Social Security, pension, earnings on investments).

Reform Michigan government and taxation to match current conditions and needs

- Restructure Michigan's tax system with fairness to promote economic growth; reform government operations to maximize cost effectiveness; and raise needed revenues for state-supported services by closing tax loopholes.



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Appendix Nine

Announcement of Research Project in Marketing Materials

THE NAME COMMUNITY PARTICIPATES IN “Groundbreaking” STUDY

The Name Community is pleased to participate with Michigan graduate student, Tam Perry, as she works to complete a dissertation project entitled “The Older Adult Moving Study.” Ms. Perry, a doctoral candidate in Social Work and Anthropology at U of M, is examining how seniors explore options about moving and downsizing. In order to gather data, Ms. Perry has conducted interviews and focus groups as well as observation. She has begun interviewing several Community members as well as other seniors in the area. She is committed to maintaining the privacy and confidentiality of the seniors in her study.

“The Name Community is a very forward looking, resident-oriented adult community, and provides an innovative model for what other adult communities will look like in the future,” said Perry. “I am very appreciative of the willingness of Name Community members and staff to participate in this important study.” – TAM PERRY

Appendix Ten

Photo Of Shower Door Hitting Toilet Seat In Retirement Community



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