

PRINCIPLES OF LOCATION
HOUSING FOR THE ELDERLY

THESIS FOR THE DEGREE M.U.P.

by
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ABSTRACT

PRINCIPLES OF LOCATION - HOUSING FOR THE ELDERLY

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Trends in community development and housing supply profoundly influence housing opportunities available to older persons. Most older persons maintain their own households; however, many of these houses are larger than necessary and the physical and/or economic burdens of maintenance are at times excessive. Many of these homes are located either within the older and often obsolete sections of our cities or in isolated rural areas. Those elderly persons who rent or do not maintain their own households face serious problems of locating accommodations suited to their needs. The general unavailability of suitable housing for these persons has resulted in many older individuals being forced to live with relatives, in institutions, or in sub-standard housing.

Old age includes a period of major readjustment for most persons when social, health and/or financial constraints upon activity necessitate changes in life styles and housing needs. The most obvious housing problems of the aged involve those individuals with insufficient income to meet their needs and those individuals who require assistance because of some physical or mental disability.

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Although economic and health problems are themselves serious, the psychological problems which confront older persons are often even more serious. For example, the loss of an occupation, through retirement, or the loss of a spouse may lead to a feeling of a loss of purpose in life and the alteration of lifelong living habits.

Attitudes toward aging, residential patterns of development, economic conditions, health, and the increasing number of older persons in the United States represent basic contributing factors to the present and future problems of the elderly. These problems are attracting increasing national concern.

Housing development and redevelopment programs represent essential components of community efforts to minimize the problems of older persons. Desirable housing, however, includes far more than a physical structure which provides shelter and safety at costs that can be afforded. For a structure to become a home it must encompass friendship patterns, all aspects of community life and promote emotions of independence in spirit and action. It is the need for a satisfactory dwelling unit in an environment in which one can take pride and find the resources needed to mold a meaningful way of life that underlies the concept of housing needs for any age group.

Housing for the elderly must, therefore, be considered as an element of the total community within which it is located. Housing for the elderly should promote feelings of dignity and self-respect which may only be encouraged by providing opportunities for privacy and

freedom of action. Such opportunities are, in turn, dependent upon security, convenience, and necessary services and facilities, qualities of the environment which vary greatly throughout regions. Those locations where opportunities for privacy and freedom of action are limited represent at least potential problem areas to aged persons.

This Thesis provides a series of general principles to serve planning agencies as guidelines in the process of evaluating and promoting potential sites for the location of housing for the elderly. The principles provide general statements that define a desirable character of development. They are intended to provide a basic set of developmental considerations upon which more detailed development decisions may be structured. They may serve both as general public policies and as working guidelines for planning staff professional activities.

The principles of location outlined in this Thesis represent a summary of information obtained from printed materials and discussions with persons professionally involved with the housing problems of older persons. Although many of these principles represent sound principles of design applicable to housing for all age groups, their importance increases as those problems associated with the aging process begin to place constraints upon the life styles of individuals. The term housing, as used in this Thesis, is applicable to all types of residential development excepting institutions, nursing homes and other facilities designed to care for individuals with mental or physical illness, including the elderly.

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Chapter 1

INTRODUCTION

Many planners and other individuals have experienced the need for supplementary information when considering policies or regulations governing the location of housing facilities for aged persons. This need may be reasonably expected to become more universal. Public and private efforts to ease the problems of the elderly are increasing with their growth in numbers and political influence.

In addition to the rising national interest in the problems of the aged, several other factors are serving to promote the involvement of local and regional planning agencies in programs influencing the housing needs of older persons. These include the "new federalism" policy of shifting problem solving responsibilities to local officials; the general recognition by the public, and the courts, that the environment of low and moderate income housing is as critical as its production, and area wide planning certification requirements and comprehensive planning assistance guidelines which insure that a housing element is included within planning agency programs.

The effectiveness of a local, or regional, planning agency's housing programs is primarily dependent upon its persuasive capabilities.

Unfortunately, the results of such planning agency activities as zoning and subdivision administration, housing allocation techniques and the Project Notification and Review Process, are dependent upon the actions of other public and/or private entities. The reaction of these entities to planning agency recommendations is normally dependent upon the philosophical soundness of the rationale supporting those recommendations.

The encouragement of housing producers to obtain proper sites for housing developments for aged persons represents an element of a housing program which warrants direct attention. Expressed as Principles of Location, the objectives of this element should be as follows:

- 1) to provide a sound rationale for persuasive needs,
- 2) to prevent detrimental environmental effects,
- 3) to assure suitable services and facilities, and
- 4) to assure the suitability of the site for residential use.

Housing programs must involve far more than just a physical structure which provides shelter and safety at costs that can be afforded. For a structure to become a home it must encompass friendship patterns, all the dimensions of community life, and, promote the emotions of independence of spirit and action. It is the need for a satisfactory dwelling unit in an environment in which one can take pride and find the resources needed to mold a meaningful way of life that underlies the concept of housing needs for any age group.

The housing problems of aged persons are basically the same as those encountered by other elements of our population. The reasons

most commonly expressed for poor housing, i. e., a lack of money and a lack of a sufficient supply of suitable housing, are generally universal in applicability. Several factors, however, do make it desirable to treat the aged as a special group in local planning agency housing programs.¹ These factors include the increasing number and scope of public sponsored assistance programs for aged persons, their large and increasing numbers, the small size and isolated nature of their households, their generally low economic status, their physical characteristics which include decreasing mobility and sensory perception, and the special social and emotional problems such as feelings of frustrations, loneliness and insecurity, which are often associated with this aged group.

The vast majority of this nation's aged have adjusted themselves to the various changes in their personal and social lives which accompany retirement and old age. They have accomplished this largely through their ability to assert their independence as individuals. The key to continuing opportunities for independence among the aged, therefore, is largely to be found in the provision of housing environments which permit them to manage their own daily activities. It lies also in the availability of supplementary services such as transportation, recreation and even laundering or meal preparation as these

¹ Philadelphia Housing Association, Health and Welfare Council, Division on the Aging, Toward Independent Living For Older People, (Philadelphia, 1958), p. 7.

become necessary. A person who is depressed or who "doesn't care" is liable to be careless, to have accidents, and to become mentally and/or physically "incapable". Conversely, a relatively well-adjusted person is much more likely to use his or her capabilities to the fullest.

We are witnessing the development of a new era in the production of housing for the aged. Increasing numbers of older people are in good health, and enjoy a better education and greater financial resources than ever before. Initial efforts in this field were to provide facilities for the indigent and the ill which resulted in crash programs to build nursing homes and other congregate facilities. We are reaching the point where more attention is being devoted to the prevention of the problems of the aged. A major portion of this attention must be directed to the provision of a variety of living arrangements which will encourage creative and satisfying living.

Many approaches are being undertaken to provide a variety of living arrangements for the aged. These include integrated or segregated age group housing arrangements, high rise or single story structures, urban or rural settings, free standing developments or developments which include a campus or complex of facilities and services for the aged. It is a contention of this thesis that the location of proper housing for the aged, within an environment conducive to satisfying their needs, is an aspect of housing production which is vital to its success. The principles of location associated with housing being developed for the elderly which are followed by local and/or regional

planning agencies may contribute to insuring this success.

For the purpose of this study, housing is considered to include single, detached, dispersed dwellings; apartments; condominiums, cooperatives, retirement hotels, boarding and personal service homes, and other similar congregate types of structures; multi-service homes for the aged; and especially planned retirement communities. It does not include institutions, nursing homes, and other facilities designed to care for individuals with mental or physical illness, including the elderly.

This study is based upon a survey of printed materials relevant to the location of housing and discussions with persons professionally concerned with the housing problems of the aged. The orientation and program used in research are reflected in the organization of this study. The first area examined is concerned with the factors and problems of the aging process and their influences upon housing needs. This area involves not only psychological and physiological matters, but also the social implications of aging.

A second topic of consideration, Chapter 3, centers upon those trends in housing practices which, from the stand point of the planning agency, are oriented to the housing needs of the elderly. This Chapter examines the role of the local planning agency in the housing industry, as well as approaches being followed by the housing industry in the production of housing for aged persons.

Chapter 4 reviews those considerations relevant to the proper location of housing developments for the aged. These considerations are reviewed in terms of both neighborhood and the site. Chapter 5 presents a summary of those locational considerations covered in the preceeding chapter. These considerations are expressed as principles of location appropriate for inclusion in the housing programs of local planning agencies.

Chapter 2

FACTORS AND PROBLEMS OF AGING

Changes in attitudes, residential settlement patterns, economic conditions, health, and the increasing number of elderly persons in the United States comprise the basic contributing factors to the present day problems of the aged. Although each factor influences the lives of the individual in a unique manner, they have combined to shape the need and demand for housing for older persons. The influence of each factor varies geographically and the local planning agency must be cognizant of the importance of each within its area of jurisdiction when formulating or evaluating development proposals.

ATTITUDES

The aged have always received special attention in every society throughout the history of man. The nature of this attention, and its influence on the activities of individuals, has varied among cultures and evolved through phases of time and technical achievement.

Many authorities contend that as our civilization has advanced, the role of the aged in community life has become less satisfactory than

during more primitive times.¹ In practically all preindustrial societies, the elderly enjoyed a fairly high social status. "As conveyors of the family's and the society's sacred values upon which the young are supposed to, and in the traditional milieu do, base their actions, old people are the fount of authority."² This position is understandable in pre-industrial societies since life is relatively short for most people primarily filled with work and other family responsibilities. Cultures changed so slowly that a premium was placed on stability and conformance to tradition. Older persons were the natural custodians of both knowledge and tradition.

Social and technological changes which have taken place within this country during the past two decades have brought about significant changes in individual behavior and relationships within groups. Tradition and knowledge are now being subject to constant change and question.

The sum of years used to separate the "middle aged" from the "elderly" is an arbitrary figure which defies definition. Presently the age of 65 is most often associated with the graduation to "elderly" status because of its association with retirement plans; however, the age

¹ Leo W. Simmons, "Attitudes Toward Aging and The Aged: Primitive Societies, "Journal of Gerontology, I, No. 1, Part 2 (January, 1946), p. 41-47.

² Gideon Sjoberg, The Preindustrial City, (New York: The Free Press, 1960), p. 177.

at retirement varies greatly among individuals. With younger persons demanding more responsibilities, the age associated with retirement will most likely decrease in the future. Thus, the concept, as well as, the position of older persons is an evolving matter as societies become more complex.

Two seemingly opposite attitudes regarding old age seem to prevail in the concepts of our society.³ One concept assumes that the elderly can be identified as being a fairly homogeneous group. All too often this concept is reflected by the assumption that mental and physical degeneration is a universal characteristic of older persons. This attitude encourages their isolation or semi-isolation from the social and economic life of the community. Some sociologists and psychologists have developed and tested a theory, called the Theory of Disengagement, which seems to lend some semblance of credibility to this attitude. "The theory states, in effect, that ... aging includes an intrinsic process of withdrawal or disengagement from social interaction and that the individual tends to become disengaged from social interaction and that the individual tends to become disengaged with little or no loss of satisfaction."⁴ When applied to housing matters, the Theory of Disengagement would tend to support the development of

³Housing Research Center, A Study of Design Criteria (Ithaca: Cornell University Press, 1958), p. 71.

⁴Glenn H. Beyer, Housing and Society (New York: Macmillan Co., 1965), p. 435.

enclaves of dwelling units intended for occupancy by aged persons rather than the dispersal of dwelling units throughout the community, neighborhood or large housing development. The theory suggests that older individuals tend to withdraw from classes of people different from themselves and prefer to remain close to others of a similar age and social background.

A second attitude concerning the aging process recognizes that people do change with age; however, the rate and nature of this change varies greatly among individuals. Individuals classified as being "elderly" and "aged" vary as widely in their mental and physical capacities as do persons in other age groups. The aged period of life may last for three decades or more and an individual's needs and desires are undoubtedly subject to great changes over any significant length of time. Persons who enjoy good health and an active life do not think of themselves as being old. The completely self-sufficient guard their independence proudly while others have always been dependent both emotionally and physically upon their families, friends, or doctors. Those with adequate financial resources experience completely different problems in obtaining health care, housing, etc., than do those less privileged. To these differences must be added variations among personalities, education, and life styles. Therefore, any notation of problems, needs, or solutions thereof, must be subject to conditions which are exceptions to generalized characteristics.

Both of the above noted attitudes toward aging warrant consideration during the formulation and administration of a planning agency's housing program. It is reasonable to assume that older people do not want to be completely isolated from community life. However, it also seems reasonable to assume that they do need the opportunity to obtain privacy if desired, and they will often prefer social contact with their age peers rather than with persons who have dissimilar ages and social characteristics.⁵ The degree to which the older person will withdraw from community life will vary with their psychological, physical, and economic well-being.

INCREASING NUMBERS OF ELDERLY PERSONS

The 1970 Census enumerated approximately 20.1 million persons 65 years of age and over, and 24.7 million persons 62 years of age and over. In the ten years between 1960 and 1970, the total population of the USA increased by 13 percent while the population 65 years of age and over increased by 21 percent. In the year 2000 there is expected to be about 29 million U. S. citizens 65 years of age and over. The number is increasing by 3 to 4 million every decade, or roughly 300,000 to 400,000 per year.⁶ Recent trends in the composition of this nation's

⁵Beyer, p. 435.

⁶U. S. Bureau of the Census, Current Population Reports, series p-23, No. 43, "Some Demographic Aspects of Aging in the United States." U. S. Government Printing Office, Washington, D. C. 1973. p. 1.

population by age group are summarized in Table 1.

Table 1

Decennial Percent Increase of Population by
Broad Age Groups: 1950 to 1970^a

Age Group	1950-1960	1960-1970
under 15 years	36.8	3.2
15 to 24 years	10.0	48.3
25 to 44 years	3.2	2.7
45 to 64 years	17.4	15.8
65 to 84 years	33.1	18.0
85 years and over	59.3	51.5

^aU. S. Bureau of the Census, Current Population Reports, series p-23, No. 43, "Some Demographic Aspects of Aging in the United States." U. S. Government Printing Office, Washington, D. C. 1973. p. 2.

Those influences primarily responsible for the increasing proportion of aged persons include a) declining birth rates, b) a longer life expectancy, and c) a marked decrease in the number of persons immigrating into this country. It is projected that by the year 2000 approximately 34.6 million persons 62 years of age and over will be residing within the United States. These individuals will comprise 11 to 13 percent of the nation's population at that time.

Projections of the future aged population have a greater probability of being correct than is the case for other age groups in our population because those persons who will be 65 years of age and over in the next few decades are now alive and there is little reason to

believe that immigration will significantly alter their numbers. The consistency of projected numbers of aged persons among the four series of projections included in Table 2 reflects the relative confidence of the Census Bureau in these numbers. Variations in the aged as a percentage of persons of all ages reflect differences in assumed fertility rates which were highest in the Series B projection and lowest in Series E.

Table 2

Projections of the Population of the United States
Aged 62 Years and Over to the Year 2000^a
(in millions)

	1970	1980	1990	2000
Series B				
Number	24.7	29.2	33.7	34.6
% of Total Population	12.0	12.3	12.1	10.8
Series C				
Number	24.7	29.2	33.7	34.6
% of Total Population	12.0	12.6	12.6	11.5
Series D				
Number	24.7	29.2	33.7	34.6
% of Total Population	12.0	12.8	13.2	12.3
Series E				
Number	24.7	29.2	33.7	34.6
% of Total Population	12.0	12.9	13.6	13.0

^aU. S. Bureau of the Census, Current Population Reports.
Population Estimates and Projections, Series P-25, No. 448. August
6, 1970.

There is little doubt that the future growth in the number of aged will be substantial, especially if real gains are made in the reduction

of mortality rates associated with those diseases characteristic of middle and later life. Decreasing rates of fertility would contribute to the proportional increase in the aged population.

The prospect of an increasing elderly population not only emphasizes the need for action on present day problems but also points out the inevitableness of greater needs in the future. Political involvement in attempts to satisfy these needs will undoubtedly also increase and the planning agency should be prepared to participate in this phase of community development.

SETTLEMENT PATTERNS

A tremendous change can be noted in the urban-rural composition of the population of this country during the past eighty years. Reports from the United States Census Bureau indicate that nearly two-thirds of the population of this country lived in rural areas in 1890. In 1970 only 26.5 percent of the population resided in rural areas. Table 3 reflects the urban-rural distribution of the population of this country and persons 65 years of age and over in 1970.

A summarization of Table 3 indicates that approximately 6.8 million Americans aged 65 years and over live in the central cities of this nation and 7.2 million persons 65 years old and over reside within rural areas or places of less than 10,000 population. These same areas include approximately 70 percent of all persons 65 years of age or over in the USA. As long as the central cities, rural areas, and many

semi-rural places of less than 10,000 population maintain their stagnant or decreasing rates of growth and lower levels of economic achievement reflected by the 1970 census, the proportional representation and problems of the aged in these areas may be expected to increase.

Table 3

United States Population and Population 65 Years of Age
and Over by Size of Place of Residence, 1970^a

Size of Place	Population-all ages		Persons 65 and over	
	Number ^b	Percent	Number ^b	Percent
United States	203212	100.0	20066	100.0
Urban	149325	73.5	14631	72.9
Urbanized Areas	118447	58.3	11106	55.3
Central Cities	63922	31.5	6842	34.1
Urban Fringe	54525	26.8	4264	21.2
Other Urban Places of	30878	15.2	3525	17.6
10,000 or more	16619	8.2	1788	8.9
2,500 to 10,000	14260	7.0	1737	8.7
Rural total	53887	26.5	5434	27.1
Places of 1,000 to 2,500	6656	3.3	903	4.5
Other Rural	47231	23.2	4532	22.6

^a1970 Census of Population, Report PC (1)-B. 1.

^bNumber in thousands.

Migration rates normally reflect the movement of the younger and better educated elements of our society. The most obvious result of the out-migration from the central city has been the economic problems these entities are experiencing with associated constraints upon public services and increases in property taxes. Unfortunately, both the

availability of public services and property taxes are of special significance to the elderly on fixed incomes.

A substantial reduction in the availability of professional services heretofore found in rural areas, smaller cities and towns, represents a most important result of the out-migration from these areas. The loss of pharmacists, doctors, dentists, and lawyers represent real problems not only to the aged in these areas but to other age groups as well. The provision of public professional services in rural areas may become a more accepted practice in these areas where public services have traditionally been minimal. The economic soundness of providing a great variety of public services in rural areas is, however, questionable.

Increases in urbanization are closely associated with both the industrial and agricultural revolutions. Prior to these technical advances, most families were institutional units in the sense that the income was earned in the home, and the agricultural orientation of most family units reduced to varying degrees the essential nature of a high family income from outside sources.

The family provided protection, health services, educational and religious services. Aged persons were an asset to the family; there was room for them within the place of residence, and they played an integral role in the function of the family. At the present time the inclusion of the elderly in family activities appears to be decreasing, especially in urbanized areas where the availability of public services

is greatest. Beyond the decreasing family sizes reflected by past census reports, an examination of the types of new housing being built in this nation and the nature of household appliances available to homemakers, reflects the increasing dominance of two generation households over formally more traditional three-generation households.

The change from rural to urban living and from an agricultural to an industrial economy, with the diminishing number of small farms, has had both positive and negative effects upon the lives of aged persons. One common change has been the transition in economic status from the self-employed owner and manager occupational category to that of a salaried employee in a factory or other large concern. Another change has been the decreasing opportunity to enjoy the luxury of a gradual and voluntary retirement process to one of a compulsory retirement at a fixed age. The shift from economic independence to dependence on governments and employers for economic security has resulted in both the decreased need for the three generation family to function as an income producing entity, and the increasing needs for government and other employers to insure the economic well-being of their retired employees. The head-of-household status, and the respect and responsibility usually associated with that status has been changed with the economy from the older individual to the chief bread winner, i. e. the employed person.

The increased mobility of the population of this country has often resulted in the dispersal of married children to where they no longer

tend to remain in the same neighborhood as do their parents. In the rural era the adult children were expected to take care of their parents in later years. Today, the number of adult children per family is smaller than in the past, and those children are often less willing, and/or able, to support their parents. The trend has been toward the public provision of support for the aged. This trend will most likely continue to increase in scope and magnitude in the future.

Power and machinery have been substituted for hand operated tools in the industrialization of the farm and factory. There have been great increases in the productivity of workers in practically all fields of endeavor. One result of these increases and innovations has been the development of a larger labor force than is sometimes desired. The older worker has at times suffered in these circumstances. The loss of status and prestige which may result from the involuntary exclusion from active life represents a difficult psychological adjustment in life.

PHYSIOLOGICAL ASPECTS

One of the many problems of aging is the gradual impairment of physical capabilities. The U. S. Public Health Service's National Health Survey (1961) revealed clearly some of the differences in health status between the population aged 65 and over, and the under 65 population.

1. The proportion of aged persons with chronic illness (such as heart disease, cancer, diabetes, arthritis, etc.) is about twice the proportion of persons under the age of 65 with chronic illness, 75% versus 38%.
2. While the aged constitute about 9% of the total population, they make up more than 55% of all persons with limitations due to chronic illness.
3. The lower income aged in particular have a high proportion of limitation of activity due to chronic illness.
4. The proportions of the aged with one or more chronic conditions range from a low of 74.7% in the Middle Atlantic States to a high of 82% in the South Atlantic States.⁷

The process of physical aging has an influence on all aspects of life, employment, economic welfare, psychological makeup, etc. Most important, however, is the influence which poor health and diminished abilities have upon daily living patterns, and consequently upon the environmental needs of the aged. It is a generally accepted rule of design that man's physical environment should conform as nearly as is possible to man's needs. This rule of design is most relevant to the considerations directed to the location of housing and other environmental needs of older persons. Neglect of environmental "requirements" will not merely result in the increased possibility of physical inconvenience for aged persons, but also in the increased possibility of danger to their physical well-being.

⁷Clyde Vedder (ed.), "Health Problems of the Aged - Basic Facts on the Health and Economic Status of Older Americans - National Health Survey," Gerontology. A Book of Readings (Springfield, Illinois: Charles C. Thomas Publishers, 1963), p. 257.

One element of the physical aging process seems to include the gradual impairment of vision. Far-sightedness and cataract formations are normally caused by a calcification and thickening of the blood vessels of the eye. This results in a reduced ability of the eye to accommodate stress resulting from glare and high brightness ratios. Many accidents involving older persons also result from their inability to see well in darkness or dim light. Because of the atrophy of the eye muscles, their ability to adapt from light to dark and dark to light situations is also greatly reduced. Proper lighting is, thus, an important consideration in site development planning.

A loss in hearing capabilities has been recognized and considered by many to be a normal accompaniment of aging. Older persons seem to be less able to adjust to external stresses and noises than younger people. Homes including older persons should, therefore, be located and constructed so that the noise level from external sources is reduced to 40 to 50 decibels, and to 30 decibels in the sleeping rooms. Floors and ceilings should be capable of reducing impact noises by at least fifteen decibels. Party walls should have a reduction of at least 50 decibels of air-transmitted sound.⁸

A gradual decline in the senses of smell and taste is probably

⁸Ralph J. Johnson and M. Allen Pond, "Health Standards of Housing for the Aging Population," Journal of Gerontology, 7, No. 1-4 (1952) p. 256.

caused by an atrophy of the olfactory and gustatory nerves.⁹ This disability becomes a hazard when natural gas is used within the household.

The most noticeable physical changes associated with aging are those associated with the human skin. The most obvious changes include baldness and graying hair, wrinkling of the skin, and an increased susceptibility to discomfort from excessive heat or cold. Other familiar changes take place in the skeletal system. Bones become brittle and fractures do not heal as quickly as in earlier years.

Older persons also often experience some impairment of their heat regulating mechanisms and are sensitive to the surrounding temperature. Other reasons for this include certain skin changes and poor circulation. An operative temperature is required to be about 5° F higher than is normal for a young adult. Heat should be evenly distributed to prevent the chilling of extremities or over-heating.¹⁰

The respiratory system undergoes change with age. There is usually a reduction in "vital capacity." This means that as a person grows older he has a diminishing ability to expand and contract his thorax.¹¹ Pulmonary disorders are very common among the aged and often occur in combination with or as a complication of other health problems.

⁹Jeanne G. Gilbert, Understanding Old Age (New York: the Ronald Press Company, 1952), p. 18.

¹⁰Johnson and Pond, p. 256.

¹¹Gilbert, p. 32.

Aging is also accompanied by a general decline in physical strength which places constraints upon daily activities. Dressing, walking, climbing stairs, and other normal activities become increasingly difficult. In regard to site selection criteria this problem of aging is most significant in that the accessibility to shops, transportation, places of entertainment, etc., must be considered in terms of the physical abilities of aged persons. Locations are also necessary where the older person can move about at his own pace without fear of traffic or active children. Facilities within these locations should provide an opportunity for the older person to sit and rest if necessary.

One of the more important side effects of the physical aging process is a decline in the sense of balance making the older person prone to falls. Younger persons seem to enjoy a sharper psycho-motor function which enables them to regain their balance quickly when a fall is imminent. Older persons, however, are rarely able to prevent falling completely once their sense of balance is lost. The incidence of vertigo also appears to increase with age and is another important cause of falls. The majority of falls can be avoided through the proper selection of sites and their developmental design. The avoidance of overly wide widths and excessive lengths of stairs and/or ramps with excessive grades, and the provision of proper lighting and short and direct paths for movement between centers of activity, are examples of environmental factors which should be given careful consideration during the site selection and design processes.

INCOME

A most basic problem facing this nation's elderly population is their generally poor economic condition. Opportunities for the gainful employment of older persons have not kept pace with the remarkably rapid growth of the aged population. Therefore, the cash income of older persons is often limited to social security payments, pensions, old age assistance, insurance annuities, etc. The total income derived from these sources are generally moderate and are not prone to adjustment to accommodate increases in the cost of living resulting from inflation. The relative economic well-being of elderly persons, as compared to other age groups in the United States, is shown in Table 4.

Table 4

Mean and Median Total Money Income of All Families
by Age of Head -- 1970^a

<u>Total Money Income</u>	<u>All Families</u>	<u>14-24</u>	<u>25-54</u>	<u>55-64</u>	<u>65 plus</u>
Median Income	\$ 9867	\$7037	\$11,049	\$10,381	\$5053
Mean Income	\$11,106	\$7534	\$12,174	\$12,016	\$7140

^aU. S. Census Bureau, "Income in 1970 of Families and Persons in the United States," Current Population Reports, Series P-60, No. 80 (Washington Government Printing Office, 1971), p. 18.

While the median income of all families in the United States in 1970 was approximately \$9,867, the median income of families with a

head 65 years of age or over was \$5,053. "About 16 percent of all families with an elderly male head and 24 percent of comparable families with a female head were poor (incomes below the poverty level) in 1969. Families headed by a man 65 years old and over accounted for one-third of all poor families with a male head while families with an aged woman as head accounted for about one in seven of all poor families with a female head."¹² "Aged unrelated individuals now account for about 55 percent of all poor unrelated individuals."¹³ "Aged family heads and unrelated individuals comprised about 19 percent of all poor white persons but only 7 percent of the Negro poor."¹⁴ However, "50.2 percent of all Negroes 65 and over have below poverty level incomes"¹⁵ and 73.2 percent of Negro unrelated individuals 65 years and over have incomes below the poverty level."¹⁶

The weighted average thresholds utilized by the Census Bureau to define poverty level incomes in 1970 were \$1,852 for all unrelated individuals 65 years of age and over and \$2,589 for all 2 person families with a head 65 years of age and over. Minor deviations from the

¹²U. S. Census Bureau, Consumer Income, Series P-60, No. 76, "24 Million Americans Poverty in the United States: 1969" 1970, p. 5-6.

¹³U. S. Census Bureau, Series P-60, No. 76, p. 4.

¹⁴U. S. Census Bureau, Series P-60, No. 77. May 7, 1971, p. 1.

¹⁵U. S. Census Bureau, Series P-60, No. 76, p. 40.

¹⁶U. S. Census Bureau, Series P-60, No. 77, p. 4.

above thresholds are provided to differentiate farm from nonfarm residences and the sex of the family head.

The number of elderly persons living in poverty status, as defined by the Federal Government, does not provide a clear portrait of the economic problems facing the majority of elderly Americans. Housing, health, recreation and other personal services required to keep a person active in life are normally limited by the ability to pay for those services. The poverty level is based more upon subsistence needs than the needs for satisfying living. Table 5 provides a more complete profile of the economic well-being of the aged.

Table 5

Total Money Income 1970, by Family Status. Persons
65 Years of Age and Over^a

	Families		Unrelated Individuals	
	Head 65 years and over		Male	Female
	Male Head	Female Head		
Number in thousands	6160	1015	1411	4397
Percent	100	100	100	100
	(percent distribution) ^b			
under \$2000	9.8	14.9	43.6	54.7
\$2000 to 3,999	13.7	11.5	21.5	20.0
\$4000 to 5,999	35.5	28.3	23.0	16.7
\$6000 to 7,999	12.2	11.5	6.0	4.0
\$8000 and over	28.7	33.8	6.0	4.5
Median	\$5011	\$5370	\$2250	\$1888
Mean	\$7176	\$6921	\$3238	\$2774

^aU. S. Census Bureau, Series P-60, No. 80. p. 35.

^bMay not total 100.00 due to rounding.

The total sum of money required for the elderly person to live on comfortably is impossible to define since such factors as family size, age, health, purchasing habits and living style all have a significant effect on income needs. Various studies have attempted to determine income levels required for a moderate standard of living for various family situations. One of the more recent of these studies and most relevant to the needs of the aged, was completed by the Bureau of Labor Statistics and outlines a retired couple's budget needed for a moderate living standard in 1966. The specific family situation applicable to this "Retired Couple's Budget" calls for an urban family which is self-supporting and living independently. The budget specifies that both husband and wife are in reasonable good health, able to take care of themselves, and both covered by hospital and medical insurance under the federal Medicare program. Two-thirds of these families are homeowners, living in houses that are mortgage-free. The couple has an average inventory of clothing, household furnishings and other equipment. Life insurance is not included on the assumption that payments on a basic policy were completed before retirement.

"The annual cost of living at a moderate standard for a retired couple averaged \$3,869 in autumn of 1966 in urban areas of the United States. The cost averaged \$4,006 in metropolitan areas and \$3,460 in smaller cities."¹⁷ The differences in total budget needs by type of

¹⁷U. S. Department of Labor, Bureau of Labor Statistics. Retired Couple's Budget for a Moderate Living Standard, Autumn, 1966, Bulletin No. 1570-4 (Washington: Government Printing Office, 1969), p. 1.

urban area and housing tenure, as well as the distribution of costs by the major components of the budget are shown in Table 6.

Table 6

A Retired Couple's Budget for a Moderate Living Standard by Type of Urban Area and Housing Tensure, and by Distribution by Major Budget Components -- 1966^a

	Urban United States	Metropolitan Areas	Nonmetropolitan Areas
Total Budget	\$3,869	\$4,006	\$3,460
Renters	3,985	4,127	3,563
Home owners	3,806	3,941	3,404
Percent Distribution	100.0	100.0	100.0
Food	27.7	27.2	29.7
Housing	33.6	34.7	29.0
Transportation	8.9	8.6	10.0
Clothing and Personal Care	8.9	8.6	9.9
Medical Care	7.3	7.2	7.9
Other Family Consumption	7.6	7.7	7.5
Gifts and Contributions	6.0	6.0	6.0

^aU. S. Department of Labor, Bureau of Labor Statistics. Bulletin No. 1570-4, p. 1-2.

After approximately four years from the date applicable to Table 6, the Bureau of Labor Statistics retired couple's budget, and the cost of living increasing by 5 or 6 percent per year, the Census Bureau now estimates that the 1970 median family income necessary for husband-wife elderly families was \$4,966.¹⁸

¹⁸U. S. Census Bureau. Current Population Reports. Series P-60, No. 80. p. 35.

The decreasing economic power, authority and deference within the family is one of the most important changes in the situation of the aged during the past century. A limited purchasing power is a primary factor influencing the lives of the aged. Priorities must be made to govern its distribution and housing is normally a primary recipient of the limited funds available. With many older persons paying over 40 percent of their incomes for housing expenses, other needs such as health and recreation are bound to suffer. "In a study of the aged conducted at the Cornell Medical Center in New York City it was found that illness does not increase substantially with age, but with lower socio-economic status."¹⁹ This finding is not surprising since preventative health services are more easily available to the more affluent.

MARITAL STATUS AND LIVING ARRANGEMENTS

The marital status and living arrangements of elderly men differ greatly from those of elderly women. In 1971 approximately 7 out of 10 elderly men were married and living with their wives, but only 1 out of 3 elderly women were married and living with her husband. "Only one out of six men is widowed, but well over half of the women are in this category. Only one out of seven men is living alone, but one out of three

¹⁹New York State Division of Housing, Housing Requirements and Preferences of Aging Persons on the Site of Borgia Burtler, 1958, p. 31.

women is living this way."²⁰

"The distribution of elderly persons by marital status has changed little in the past decade, but their distribution by family status has shown marked shifts."²¹ The proportion of elderly men and women living in families has decreased during the 1960's. This decrease is primarily due to decreases in the proportion of older persons residing in families who were neither the heads nor wives of the heads of the families with whom they reside.

The proportion of aged men and women who maintain their own households, in non-family situations has been increasing in recent years. Approximately one in six males 65 years old and over in 1971 is a "primary" individual and over one in three elderly women live in non-family households.²² "Nearly all (about 96 percent) primary individuals 65 years old and over occupied their own house or apartment entirely alone as "one-person household" in 1971."²³ Table 7 provides an overview of the changing family status of elderly persons.

In 1970 approximately 75 percent of the families in this nation with a head 65 years of age and over, lived in their own households.

²⁰U. S. Bureau of the Census, "Some Demographic Aspects of Aging in the United States," Current Population Reports, Series P-23, No. 43, (Washington: U. S. Government Printing Office, 1973), p. 25.

²¹U. S. Bureau of the Census, p. 27.

²²U. S. Bureau of the Census, p. 27.

²³U. S. Bureau of the Census, p. 27.

Approximately 90 percent of these families resided within dwelling units with four or more rooms,²⁴ thus indicating that a significant proportion of these families lived in residences which were too large for their needs. This represents an underconsumption of housing and shows that many families do not move into small housing units as the size of the family decreases.

Table 7

Percent Distribution of Persons 65 Years of Age and Over, by Family Status, 1961 and 1971^a

Family Status	1971		1961	
	Male	Female	Male	Female
Percent	100.0	100.0	100.0	100.0
In Families	79.7	57.5	83.5	67.6
Head	72.7	8.7	72.5	11.6
Wife	---	33.8	---	34.4
Other Relative	7.0	15.0	11.0	21.6
Primary Individual	14.7	36.2	12.1	27.6
Secondary Individual	1.9	1.6	2.1	2.5
Inmate of Institution	3.6	4.6	2.4	2.4

^aCurrent Population Reports, Series P-23, No. 43, p. 27.

Contrary to the norm for younger families, most aged families who live in their own households own the home in which they live. In 1970, 78.4 percent of all aged families who lived in households resided

²⁴U. S. Bureau of the Census, "Characteristics of Occupied Housing Units by Household Composition and Tenure, for the United States, 1970, Supplementary Report, Series HC(S1)-3 (Washington: Government Printing Office, 1972), p. 5.

within owner occupied housing units while 21.6 percent rented.²⁵ Comparable tenure percentages for the nation's total population residing in households was 62.9 percent owner and 37.1 percent renter occupied housing units.

Although many of the aged own mortgage free homes, these homes are often too large for their needs and of an older vintage.²⁶ As a result, many are both difficult and expensive to maintain. A 1969 Department of Housing and Urban Development publication noted that "60 percent of HUD rehabilitation grants have gone to applicants over 62 years of age."²⁷ While pride in homeownership is an important contributing factor to the high participation rates of aged persons in rehabilitation programs; it also points out their concentration in decrepit urban areas, and poor economic status.

In the case of those aged persons who rent or do not maintain their own households, housing problems are largely limited to locating accommodations which are suited to their economic and physical needs. The general unavailability of suitable housing for these persons has resulted in forcing many older persons to live with relatives, in institutions, or in substandard housing.

²⁵U. S. Bureau of the Census, p. 5.

²⁶Philadelphia Housing Association, Toward Independent Living, p. 24.

²⁷HUD Challenge, (Washington: Government Printing Office, 1969), p. 10.

SUMMARY

In many respects sociological and psychological problems of aging are directly related to their economic and physical problems in what may be considered a cause-effect relationship. As previously indicated, many of the nation's aged are in a relatively poor financial condition. Their incomes are small, often fixed, and many have little or no opportunity to improve their circumstances because, for various reasons, they can no longer work.

While economic and physical problems are in themselves serious, the psychological problems which they may promote are often even more serious. The loss of occupation, for example, may lead to a feeling of a loss of purpose in life. A related loss of income may also result in the gradual curtailment of lifelong living habits. Often former pleasures must be given up to provide for the necessities of life and even the definition of the necessities of life may have to undergo transformation.

The problems of aging, in a number of instances, may necessitate a move to less expensive housing. Because of the relative shortage of small apartments and houses suitable to the needs of the aged, this move may result in the eventual occupancy of a furnished room or run-down apartment. Such a move may promote a loss of psychological security derived from residing within a familiar neighborhood. Such dwellings may also prove to be so difficult and hazardous for the elderly to maintain and enjoy access to neighboring environs that they increase their physical handicaps. This may lead to a loss of mobility and the

loss of feeling of independence.

Failing health and declining physical strength also influence a person's mental condition. Many old people become so aware of their infirmities that they live in almost constant fear of accidents. It is not difficult to imagine, therefore, how a sense of frustration, loneliness, and insecurity can arise from a reduced income, health problems, and the gradual loss of friends, particularly the loss of the spouse.

Changes in the social structure of this country in the last few decades have also resulted in a number of sociological and psychological problems with which the aged must cope. The most significant of these changes is the rapid disappearance of the three-generation household unit. There are many reasons for this; the urbanization of society, increased social and spatial mobility, changing concepts of parent-child relationships, and the gradual decrease in the size of new dwelling units. Formally, older members of the family played an important role in family life in both a social and economic sense. There were many opportunities for the older person to remain occupied and to be useful to the family at the same time. They had a secure place in life's activities and were well taken care of. Today, children tend to disperse and leave the basic family resulting in the necessity for parents to take care of themselves. That such a large number of the aged can live independently is in large measure due to their increased financial independence, modest though it may be, made possible by the various retirement and pension plans and the social security programs.

Even where children are willing to take in aged parents, there is generally little room for them, physically or psychologically. Most of the new housing today simply does not have the room to accommodate anyone outside of the immediate family unit, often not even that. The once familiar guest room has all but disappeared from the American scene. Many parents are taken in by their children although in most cases, this is hardly a satisfactory solution, particularly since, the head-of-the household role now belongs to the breadwinner in the family. This change in economic and social roles generally results in the aged and retired parent finding him or herself feeling superfluous, noncontributing and a burden on the young family. This situation can not be expected to inspire feelings of self-respect and independence in an elderly person.

The urbanization of our society is a trend which many authorities consider a casual factor in the apparently increasing rates of separation of the different generations within families. Migration trends of rural to urban, and inner-city to the suburb, generally reflect the movement of younger persons. The vast majority of the aged are hesitant, and often unwilling to follow their children to new places of residence. Consequently the number of three generation households is decreasing in this country with the elderly remaining in rural or inner-city areas when their children move to newer areas of development.

The consequences of the separation of the elderly from their children is of increasing importance as a factor influencing the housing

problems of the aged. Typically, the housing needs of individuals vary with their age and family status. The variations in need are often explained in terms of a three-phase "housing cycle", which may be summarized as follows; young, husband-wife, families beginning married life reflect a characteristic set of criteria concerning a need for housing. Then, as the husband and wife become parents, their needs grow with the size of the family, and in the last phase of the cycle, when the children grow up and leave the parents, their housing need is again reduced. Actually this three phase cycle should be expanded to five phases, to account for the young single person, and the elderly single person whose spouse has passed away.

Earl C. Doyle presents an important set of observations concerning the "housing cycle" as follows:

First, the conditions that motivate the changing need are social rather than economic. The cycle operates whether the people involved are poor or rich or in moderate circumstances. Second, the main determining factor is simply the size of the family. Third, the minimum of housing facilities can suffice, if necessary, in both the first and last phases. Fourth, granted the need, the degree to which the need can be satisfied in our society is determined by the degree to which it can be paid for. And fifth, it is in the last phase of the cycle, that of old age, where the financial problems are generally most acute. Once again the whole crux of the matter is reduced to the economic.²⁸

The most obvious housing problems of the aged are primarily centered around those individuals with insufficient income to meet their

²⁸Earl C. Doyle, "The Building Industry and Housing the Aging," Ch. V, Housing the Aged, ed. Wilma Donahue (Ann Arbor: University of Michigan Press, 1954), p. 51.

needs, and those who require assistance because of physical disabilities. Presently there exists no comprehensive approach towards the solution of these problems. The increasing number of elderly persons in our society is resulting in longer periods of retirement with associated economic difficulties, more chronic diseases, and more individual households and small families headed by older people. All these changes pose continuing social, medical, financial and housing problems. Old age is a period of major readjustment for most persons.

When consideration is directed toward the broad spectrum of social and psychological aspects of aging, the housing problems of the aged can be traced to practically all aspects of our society. It is not difficult to understand why the aged generally resist leaving old neighborhoods which are rich in associations and memories, and why they might crave some quiet and privacy. It is also not difficult to understand why most studies indicate that the elderly seem to prefer independent living and appear to be physically and emotionally healthier in their own homes.

Chapter 3

TRENDS IN HOUSING PRACTICES

The National Housing Act of 1949, called for "the realization as soon as feasible of the goal of a decent home and a suitable living environment for every American family." This admirable goal has been reiterated in nearly every publication or legislative act concerning housing since its adoption by Congress. In passing the Older Americans Act of 1965, Congress stated that "in keeping with the inherent dignity of the individual, older people of our nation are entitled to suitable housing; individually selected, designed and located in reference to special needs and available at cost which older people can afford."

Despite this nation's goal of giving special consideration to the housing needs of its older citizens "it is apparent that the decade of the 70's finds the housing circumstances of older people as critical as ever."¹ The proper partnership between the Federal Government, the States, communities and private enterprise for producing housing has not been obtained. "It has taken ten years to build enough units to house

¹Conference Technical Committee, Work Book on Housing for Participants in Community White House Conference on Aging (Washington: Government Printing Office, 1970), p. 12.

just one year's annual increase in the older segment of the population."² Federal interests are critical of local zoning laws, restrictive building codes, inflexible trade union practices, etc., while local interests point to mountains of red tape and a lack of commitment on the part of government agencies during discussions of how a more ideal partnership for low- and moderate-income housing production may be realized.

Essentially, the home building industry does operate as a co-operative effort between private enterprise and public support. The basic factor influencing the rates and nature of residential construction is the profit motive, which in turn varies in attractiveness with the availability of credit. The degree to which credit is available serves to influence the investment programs of financial institutions, the nature of the building industry, the volume of construction, the standards of quality and design, and even the basic patterns of land tenure.

The federal involvement in the credit aspects of housing production, has served as a most important catalyst to the production of housing units for the past forty years. So vital is the financial risk bearing role of the federal government, by means of insurance and guarantee functions and its secondary market purchases, that the distinction between "public" and "private" housing is much less significant than is generally believed.

²Conference Technical Committee, p. 13.

The initial involvement of the federal government in housing was with public housing, then war-time and veteran's housing, and then slum clearance and redevelopment. More recently, it has been recognized that neighborhood conservation, rehabilitation, and developmental programs are also necessary to improve residential living conditions.

A multitude of federal domestic assistance programs, and dollars are being devoted to attempts to improve community living standards. More programs and dollars will undoubtedly become available in the future. Each program involves its own constraints in that perhaps unique local situations must exist, administrative procedures must be followed, and local plans must be prepared.

To bolster the achievement of common goals and objectives, the local planning agency should be in a position to work with federal and, increasingly, state agencies. However, it is generally not feasible for the local planning agency to attempt to monitor all the changes taking place among domestic assistance programs due to their sheer numbers and administrative complexities. Only when local areas have defined their goals, and outlined methods of achieving those goals, are they in a position to actively pursue and enlist the assistance of state and federal programs. In the topical area of housing for the elderly, these goals must involve the quantity and types of housing desired, as well as, the quality of social and physical supportive services needed.

Unfortunately, the type, quantity, and location of housing being produced by the housing industry represents developmental decisions

which are primarily dependent upon the asperations of the private sector and local government. This state of affairs has resulted in the distribution of housing for the elderly in this nation in a manner which bears little or no relationship to the numbers of older people. Some areas are overbuilt while in others there may be no housing for the elderly at all even though the need is there.³

Inorder for the local planning agency to influence local trends in housing practices influencing aged persons it must be aware of its role in the housing industry as well as the various types of housing which may be produced for occupancy by older persons. Various aspects of each of these considerations are most relevant to the principles of location assigned to elderly housing problems in various situations, as well as the priorities of importance assigned to the policies and standards associated with each principle.

THE LOCAL PLANNING AGENCY AND THE HOUSING INDUSTRY

The local planning agency is limited in its capability to influence housing development processes due to its traditional advisory role in public affairs. What the planning agency can do, however, is to serve as an analyst, educator and promoter of specific types and forms of housing needed within the community. A comprehensive planning program oriented to housing needs would include the following elements:

³Conference Technical Committee, Work Book on Housing, p. 7.

- a) Long-range community planning to insure that housing (especially housing for elderly persons) is a component of a community structure which includes those facilities, services and opportunities which contribute to satisfactory living conditions.
- b) Marketing information systems to document housing needs and demands.
- c) Research and analysis of economic and social constraints upon housing production efforts in order to help minimize the detrimental influences of existing constraints.
- d) Public education and technical assistance activities which promote the production of housing consistent with sound principles of planning.
- e) Housing allocation programs to stimulate the immediate- or short term-production of housing consistent with agency goals and objectives.

The accomplishment of each of the above listed program elements will vary considerably with time and the availability of resources. All elements, however, are interdependent and are necessary components of a housing program. They are also necessary components of a successful comprehensive planning and development program.

Long-range planning activities vary in definition, content, and the emphasis placed upon topical concerns of interest. Its primary objective, however, is the achievement of a higher quality of life. This objective involves not only the quality of residential structures, but also the design, location, and quality of such services as transportation, shopping, parks, schools, public safety, health, welfare, etc. The objective of this thesis is to develop principles of location

applicable to housing developments for the aged which would be appropriate for inclusion in the housing element of a comprehensive long-range plan document.

Because long-range planning activities involve assumptions regarding future developmental activities which are mostly impossible to anticipate, such plans must be oriented to objectives, principles and standards which may be applied to a variety of specific developmental proposals. To be useful as a guide for development applicable to existing housing programs, such plans must define desirable situations against which those specific proposals may be evaluated. Obviously, as development occurs and community values change, long range plans must be amended. Such plans, thus, serve as tools for elected officials to evaluate change, and they serve as a means for private interests to anticipate public reaction to specific developmental proposals.

Housing Market Information Systems

Housing market information systems represent a vital element of planning programs through the provision of information required to identify housing needs and to generate activities critical to meeting that need. A number of types of data are necessary involving the housing stock, its condition, location, costs, and the changes in these over time, and the population by household, its size, composition by income, race and age, location and its change over time.

Information systems serve as valuable tools for documenting needs and promoting activities to eliminate those needs. Such systems should:

- a) provide a data base of housing information which is as comprehensive as it is feasible.
- b) allow the most needed types of data to be the most accessible.
- c) form an integral element of a larger more comprehensive information system.
- d) provide timely reports of the state of the housing situation.
- e) be capable of reporting information for a wide variety of geographical areas.

Removal of Constraints

The removal of constraints upon the producers of housing is another means of promoting housing development available to the local planning agency. Primary constraints upon production include problems with obtaining finances, the cost of labor, materials, land, and taxes, and, unreasonable and/or inconsistent local developmental controls.

Financial resources require, in addition to cash, administrative and legal systems which promote housing production efforts. Thus, the local planning agency may investigate and recommend alternative methods of arranging for financing needed housing developments. Such methods may involve the promotion of housing and/or redevelopment authorities, working with non-profit development corporations, etc.

The planning agency should also take all measures required to ensure that the community is eligible for the receipt of Federal housing funds and other forms of community development assistance. Associated with its continuing program would be the continued encouragement of Federal and State programs designed to stimulate and expand housing mortgage financing on a continuous basis.

The costs of construction and housing associated with labor, materials, land and taxes are major problems which have required public participation in the home building industry. Solutions to these problems will require innovation in production techniques and the financing of local government. Operation breakthrough and Federal Revenue Sharing programs represent more recent public programs which should assist in reducing the impact of these problems upon the production of housing for low- and moderate-income households. The local planning agency should promote innovation within the building industry through the promotion of Breakthrough concepts and the promotion of development controls which accommodate innovation. The local planning agency should also promote local programs, such as urban renewal, which would assist in land acquisition and development programs which further public objectives. Property assessment equalization programs and assessment systems based upon the public interpretation of the highest and best use of land as expressed through zoning ordinances rather than estimated market values, represent other activities the planning agency may pursue to alleviate land and tax cost problems.

Local Developmental Controls

Local developmental controls represent a most direct avenue for addressing locational problems of housing production. Zoning ordinances, subdivision regulations, housing and other codes represent obvious influences upon the production of housing. These same developmental controls should reflect local policies regarding growth and be utilized as tools for guiding growth and development in desired directions. Consideration upon which the specific provisions of these controls are based should be those which promote the health, safety, or general welfare of the community.

A 1965 New York trial decision held that: "Age, in and of itself, is just as irrelevant a consideration in so far as zoning is concerned as is race, color, creed, or physical condition."⁴ Increasing numbers of communities, however, are directing specific considerations to aged persons in the development and administration of developmental controls. Planners give essentially two reasons for making adjustments for housing for the elderly, 1) the elderly have different housing needs than people in other age groups, and 2) developers find that without modifications, building housing for the elderly, especially publicly assisted housing, is not economically feasible.⁵

⁴ASPO Planning Advisory Service, Zoning for the Elderly, Report No. 259 (Chicago: ASPO, 1970), p. 4.

⁵ASPO Planning Advisory Service, p. 6.

Concessions in reducing developmental standards for housing for aged persons are usually accomplished through variations in definitions, reduced parking requirements, provisions for higher densities of dwelling units, allowing for smaller floor areas within dwelling units, and by decreasing lot area per dwelling unit requirements. Although recognizing that concessions that lower minimum standards tend to have considerable permanence and be extended to unrelated situations, advocates of these concessions rationalize that it is better to have lower standards than to have a housing shortage for the elderly.

Undoubtedly, situations will arise where a community's standards regarding development conflict with its desires to insure that older persons are provided an opportunity to reside within decent, safe, and sanitary housing. When these standards are based largely upon local preferences which exceed health, safety and welfare needs, variations in these standards are warranted to accommodate the housing needs of the aged. However, the physical aspects of community development usually exert a more permanent effect upon the community than do the humanistic aspects of that development. Structures and lot lines, like streets, are very difficult to alter or abolish once they are created. A structure presently intended for occupancy by the aged may soon include individuals of lower ages or even cease to be put to residential use.

Modifications permitting less than minimum standards for the

area in dwelling units and in usable open space have contributed to the failure of some public housing projects for low-income families.⁶

Short term solutions to immediate problems may contribute to future problems. Modifications of standards should, therefore, be based upon documented needs and the awareness of the long term influence upon the neighborhood and community.

Public Education and Technical Assistance

Public education and technical assistance activities represent components of on-going organizational programs common to all planning agencies. Newsletters, public presentations, and the making available of documentary resources represent educational and assistance activities. To support an effective housing program special emphasis should be made to bring housing issues before the public through publications and the participation in programs with other public and private interests in the housing field.

Housing Allocation Techniques

Housing allocation techniques represent planning agency programs which concentrate efforts upon the production of short term action-oriented plans. In essence, allocation programs outline priorities and responsibilities for the development of housing for low- and

⁶ ASPO Planning Advisory Service, Zoning for the Elderly, p. 8.

moderate-income households. Housing needs are documented with available information, short range production goals are defined and allocated to low-income housing producers by geographic areas within a community or region. Specific techniques of allocation vary; however, they are usually based upon needs reflected by demographic and housing studies. Priorities associated with the number and type of housing desired vary geographically throughout the planning area.

Housing allocation techniques provide a most valuable tool for coordinating and promoting housing developments which are responsive to existing needs on a regional basis. The actual involvement of elected officials, public and non-profit housing producers in the process to determine allocations, associated priorities, and responsibilities serves to promote housing production. When housing allocation programs are coordinated with long-range goals and objectives, they should serve as a most effective means of community improvement.

HOUSING TYPE

The various types of housing now being made available for the elderly may generally be placed in one of the following categories:

1. Homes for owner-occupancy
 - a. integrated with the community
 - b. a part of a colony of homes designed for occupancy by persons of similar social and/or economic status
2. Apartments for independent living
 - a. of private profit or non-profit sponsorship
 - b. developed through a public housing program
3. Group housing
 - a. of an institutional nature
 - b. of a non-institutional nature

The primary criteria which differentiates the above categories involves variations in consideration of those factors and problems of aging discussed in Chapter 2. Housing tenure, variations in the degree of supportive services available to the aged, and differences in the degree to which the aged are isolated from the total community comprise the basic variables in the types of housing amenities available to older persons.

Each category is also subject to variations in the type of structure within which the individual dwelling unit is located. In essence, there is no single type of structure best suited to the needs and desires of older persons as these needs and desires vary with their dependence upon others and their preferences molded by past life styles. "Some prefer the street level, others feel safer above the ground floor; some are frightened by self-service elevators, others like them. Some people like direct access to the ground and the opportunity of gardening, while others would prefer a balcony."⁷

Initial housing programs oriented toward housing needs of aged persons centered upon the provision of facilities for the indigent and the ill. They resulted in the appearance of numerous nursing homes and other congregate facilities such as rest homes. Religious, fraternal and philanthropic societies sponsored most of the housing produced for the more able-bodied older population. Public hospitals,

⁷Philadelphia Housing Association, Toward Independent Living, p. 12.

infirmaries and mental institutions sheltered the poor and indigent.

Studies indicate that approximately 6 or 7 percent of the total aged population are either bedridden or housebound, and that approximately 26 percent are ambulant but limited in their activities and movements. "Peter Townsend of the London School of Economics and Political Science, who has undertaken several important studies of older people, feels that only 2 percent of older people actually need to be in nursing homes and hospitals if adequate home care services could be provided."⁸ These figures are significant in that they indicate the approximate percentages of the aged who need specialized housing facilities and/or special social services which are normally associated with institutional living environments.

Unfortunately, the great majority of the aged who do not require specialized housing accommodations are often experiencing problems in locating and/or maintaining adequate housing. Practically all professionals in the field of geriatrics agree that the elderly prefer independent living and appear to be physically and emotionally healthier in their own homes than in institutional environments. In light of this attitude, adequate housing may be defined as housing that enables older persons to live independently, that is, within their financial capabilities and is located and serviced so as to promote their social, physical,

⁸Glenn H. Beyer and F. H. J. Nierstrasz, Housing the Aged in Western Countries (New York: Elsevier Publishing Co., 1967), p. 9.

and psychological well-being.

Reflecting acceptance of the importance of independent living for older persons, most new housing now oriented to the "senior citizen" market emphasizes this attribute. Increased attention being directed to the housing needs of the aged is also resulting in changes in semantics descriptive of housing types. In addition to the traditional terms of houses, apartments, homes for the aged and nursing homes, new terms including "dispersed residence" (meaning homes scattered among other homes in the neighborhood or community); "proximate residences" (meaning housing accommodations for the elderly in groups, i. e. not scattered); "congregate living" (meaning a group of elderly persons living under the same roof); and "protected living" (meaning that the aged are in such physical or mental condition that they need to be provided with institutional care).

Dispersed Housing

Dispersed housing represents that type of housing which provides the greatest potential for independent living. Unfortunately, those factors and problems of aging covered in Chapter 2 tend to intensify the differences between generations, to limit the reciprocity of their relationships and weaken the basis of their association. The result is that a common social frame of reference often develops among the elderly of similar social class.

Normal neighborhoods may develop into excellent instruments for insuring the isolation and demoralization of old people. The loss

of family, friends, and the dispersal of their aged peers, reduces associations. The number of eligible new friends is small and scattered, and the effects of this are complicated by any decline in health or mobility.

The social isolation of the aged within their older neighborhoods is a basic reason for the success of segregated housing developments which concentrate rather than diffuse the aged, and, thereby, maximize the opportunities for social interactions. "There has been considerable controversy, both in the United States and in several foreign countries, concerning whether or not housing accommodations for the elderly should be dispersed among housing accommodations built for younger families."⁹ The attractiveness of segregated housing is reflected in the development of isolated buildings, housing projects, or even entire communities intended exclusively for occupancy by older persons.

Based largely upon the Theory of Disengagement, the separationist position partly evolved through a misinterpretation of the needs and desires often expressed by older people. The desire of elderly persons to escape noise and confusion was interpreted as a desire to escape from society entirely, and the expressed preference of older persons for the company of aged persons exclusively.

The "intergrationist" school of thought maintains, with some reservations that the aged should be encouraged and permitted to remain

⁹Beyer, Housing and Society, p. 435.

integrated within a normal community or neighborhood social structure. This position is at present receiving the most support from housing experts because of their feeling that this situation will support independent living and self-respect. The philosophy of integration has been reinforced by the often sad experiences of elderly persons within large institutions of various kinds designed largely for the occupancy of older persons.

"On the crucial issue of segregations versus integration there is not agreement and no finality."¹⁰ This is not surprising since the housing needs of aged persons are basically dependent upon their mental, physical and economic well-being. The degree of segregation or integration achieved is a balance between the needs of the aged person and the availability of supportive environments required from other sources to satisfy those needs. Larger concentrations of aged persons make it easier to provide those community services needed. Variations in community service levels available to the aged accompany variations in housing types. Levels of services generally increase from dispersed residences, to proximate residences, to congregate facilities, and finally to "protected" living arrangements.

When housing preferences are superimposed upon housing needs the need for both integrated, and various degrees of segregated housing accommodations becomes evident. A large percentage of the aged

¹⁰J. L. Newman, "An Aging Population in an Urban Community." EXISTICS: Vol. 21, no. 124 (March 1966), p. 194.

prefer, and are capable of, occupying dispersed residences fully integrated in community life. However, a large percentage of the aged need and/or prefer some degree of segregation from community life which proximate, congregate, or "protected" living provides.

A degree of segregation would seem to be a preferable life style to the extent that relatively small numbers of persons with similar interests can easily socialize. A degree of integration also seems preferable in that the older person is not completely isolated and has the opportunity to mix with the general population when he desires. Many older people prefer domestic isolation as long as they can maintain frequent contact with nearby friends and relatives. Practical experience indicates that completely integrated (dispersed residences) housing programs for the elderly are not satisfactory solutions to the housing needs of even the independent aged. "The major large-scale experiment has been in Sweden where, a few years ago, it was decided that all new government-supported housing for older persons should be mixed with housing for younger families. That policy is now under review, with the possible result that proximate housing will again be made available to older persons."¹¹ This review originated out of the expressed desires of many of the aged to socialize with their peers.

While dispersed housing practices have their weaknesses, it is also generally accepted that healthy older people should not be removed

¹¹G. H. Beyer, Housing and Society, p. 435.

from the general life of the community nor should they be housed in large projects that have an institutional character.¹² Older persons often dislike being segregated in large numbers. Individual identities seem to suffer and mental and emotional problems arise from isolation, or at least the feeling of isolation from normal community life. A major goal associated with the provision of housing for the aged, therefore, is to provide for a social unit which is large enough to justify those specialized services which enable a older person to live independently, while remaining small enough for the elderly to retain a feeling of importance and independence.

Major social gains may be realized from the residential concentration of older people. Beyond maximizing the opportunity for new friendships, the integration of older persons into groups may facilitate their acceptance of a "aged" life style. Age peers provide role models on which a person may pattern his activities and the group may also generate new activities which crystallize new role dimensions.

By legitimizing life styles, age peers aid in the acceptance and development of new roles which may contribute to a more satisfactory self adjustment to the factors and problems of aging. The older person may no longer need to cling to youthful standards which they cannot meet

¹²Philadelphia Housing Association, Toward Independent Living, p. 8.

and for which the necessary life conditions have withered away.¹³

Two conditions will enhance the accomplishment of the above described social gains which may be realized from the concentration of older people. It is most important that the individuals concerned be basically homogeneous in their social composition. The sharing of similar values, interests, and problems preserves a basic continuity in life and stimulates social intercourse. The second condition is that the context of the segregating effect, that concentrations of residents for specific groups exhibit, should be insulating rather than invidious or stigmatizing. Segregation must impinge on residents in socially acceptable terms rather than in terms of de-valuation, marginality and loss of status.¹⁴

Significant economic gains, for both the older person and society are feasible in the volume of housing and special services provided through the concentration of residential units for the elderly. It is less expensive to build a number of dwelling units in one place than in an equal number of scattered sites. It is also economically advantageous to the community to provide efficient public services to a concentrated rather than dispersed market. To the older person, concentrations of dwelling units also represent additional opportunities for housing choice, especially where agreements can guarantee the continuity of an

¹³Irving Rosow "Retirement Housing and Social Integration" Gerontology. A Book of Readings, ed. Vedder (Springfield: Charles C. Thomas, 1963), p. 392.

¹⁴Rostow, p. 392.

economical rent or where special services or conveniences are provided beyond those that may be expected in the traditional single family private home.

Proximate Housing

Proximate housing developments represent an increasingly popular approach to the provision of shelter for the aged. It represents a means through which limited degrees of concentration may permit a more efficient utilization of services within, if properly designed and located, a physical setting conducive to social interaction between occupants and the community within which the development is located. Proximate housing also appears to provide a most satisfactory approach to the development of elderly housing in existing communities in that the financial and physical aspects of development are familiar to both builders and bankers.

Criteria defining the ideal number of dwelling units to be included within a proximate residential complex vary from source to source. "The Swedish Government advises concentrations up to 100; but their leading expert, Dr. Berggren gives limits of 18-60 and prefers 30-40. The English Ministry will approve 60-75 but advises 20-40. The Dutch favor bigger concentrations, up to 300, with a minimum of 50, but they provide more services than most and 50 is the smallest number they think makes for economy in staffing. Generally speaking, 30-40 is

regarded as a reasonable figure."¹⁵

In general, concentrations of over 100 dwelling units for the elderly are considered too large and institutional in character. Smaller concentrations of dwellings must be more dependent upon the out-side community for support than are larger more "institutional" developments. Therefore, many authorities promote the location of proximate housing developments in those areas of communities which have in existence the most complete spectrum of public services, thereby encouraging larger concentrations of older persons in the older sections of urban areas.¹⁶

Congregate Housing

Congregate housing developments are very similar to proximate housing developments and differ only in the emphasis placed upon the availability of common services. Proximate residences may be included within either single or multiple family structures. Congregate housing projects are normally multi-family projects where common facilities such as dining areas, rest rooms, laundries, etc., are shared and staff services are often provided those common areas. Thus, the dependence of the aged occupany upon the neighboring community and himself is less than in proximate situations. The institutional atmosphere is however, greater.

¹⁵Newman, p. 194.

¹⁶White House Conference on Aging, Background Paper on Housing, (Washington: U. S. Government Printing Office, 1961), p. 38.

Residential Hotels, or clubs, represent an attempt to lessen the institutional atmosphere of congregate living situations by providing older persons greater flexibility in the management of their daily life activities. Significant increases in the quantity of accommodations offered by hotels, motels and tourist courts have occurred in practically all urban areas. With this new construction many older facilities are finding it to be difficult, or impossible, to operate on a profitable basis. To stay in business many of these older facilities are adopting a semi-apartment atmosphere by renting rooms for continued occupancy and/or converting rooms into efficiency apartments. Older residents of these facilities have approximately the same status as other guests and are free to come and go as they please, utilize common areas, and enjoy at least some housekeeping services.

The difference between a residential club and a retirement community is at times slight and partly dependent upon promotional literature. Retirement communities have become popular in this country and are based largely upon the concept that older persons prefer to reside in concentrations where common interests may be enjoyed. The retirement community may be relatively small, including nothing but dwellings and existing as an island of settlement within a community, or they may reach the size of smaller sized cities which exist as completely self contained centers of development.

The demand for housing within retirement villages includes many persons under the age of 65. The best sales bets for most of these

developments, which are reasonably close to populated areas, are people who have not yet retired, whose main expenses, like a college education for children, have ended, who are able to afford housing more suited to their needs than are the homes they have lived in while their families were growing.¹⁷

Retirement communities are becoming more popular and may be expected to increase in popularity as the younger generations of today reach old age. Developments of this type are most attractive to persons who are financially secure and not emotionally tied to those neighborhoods, or communities, within which they have spent their younger years.

The "Geriatric Complex" is a term which is utilized to describe a unique type of housing project found in a few European countries and the United States. "In these projects, the concern has not been focused on the number of elderly people housed together nor on mixing them with the younger population. Rather it has been focused on providing projects where the "total" needs of the elderly, during different stages of health and capability, could be met in one project location."¹⁸ Often referred to as "three-step projects," these developments are intended to meet the needs of the elderly during three stages of physical ability, from 1) the completely well who need little or no care, to 2) the infirm

¹⁷"Is Retirement Housing Today's Best Bet for Boosting sales and Profits." House and Home, Vol. XX, No. 4, (1964), p. 112.

¹⁸Beyer, Nierstrasz, p. 40.

who need general care, to 3) the chronically or long-term ill who need skilled care.

The basic characteristic of the "three-step project" is that three types of residential areas are developed on one site. Apartments, rowhouses or cottages for independent living, a congregate facility for the infirm, and a "protected living" institution for the chronically ill. This arrangement is advantageous in that residents know that if they should become ill they can receive care in familiar surroundings where their friends within the complex can visit and where they know ahead of time the people who shall be providing the needed care. Closer supervision with available services also enables individuals to remain within independent living arrangements for a longer period of time than what may be the case in other situations.

The institutional nature of the "geriatric complex" is its primary disadvantage, although some older persons would not necessarily consider this atmosphere to be detrimental to their mental well-being. Other persons sarcastically add that if only a cemetery were on the site, these complexes would solve all the problems of old age.

SUMMARY

The influence of the local planning agency upon the type, quantity and location of housing being produced for older persons is primarily limited to its persuasive powers. Federal agencies normally request planning agency comments concerning projects involving

subsidies. Local elected officials determine development controls which are usually reviewed by planning agencies, and, private developers normally must operate in conformance with local codes and ordinances which often necessitate the establishment of communications with planning agencies. Thus, while the planning agency may not serve as a vital determining factor in the production of housing, it usually is provided an opportunity to comment upon development proposals. Its effectiveness upon guiding development will primarily depend upon the soundness of rational utilized during this review and comment process.

To be effective, the local planning agency must be prepared to offer constructive comments which are clearly based upon community supported goals and objectives, as well as, well documented comments regarding housing needs and physical development practices. The local planning agency must be aware of the need for housing for the elderly in the community. This need should be documented in terms of type and quantity. Unfortunately, many aspects of the housing industry are subject to political manipulation and intrigue in no way related to the housing needs of the community. The planning agency, thus, should not adopt a passive role in housing production activities. Needs should be defined and the planning agency should adopt a positive action program to eliminate those needs.

Chapter 4

REGIONAL AND SITE LOCATION CONSIDERATIONS

The site and neighborhood within which a dwelling unit is located is a most important contributing factor to the social, psychological and physiological well-being of its occupants. To the aged, the environment of the neighborhood and site is of special significance because of the following factors.

1. Most aged persons live alone or in two person households. The amount of regular social contact experienced within the confines of the dwelling unit is less than when children were present or the spouse alive.
2. Most aged persons are retired from job activities. Therefore, the universe within which social contact can occur is more restricted than that of younger persons. Work, daily commuting, shopping, etc. are examples of activities which provide younger persons with access to a great variety of environments and social contacts which are often unavailable to retired individuals.
3. The mobility of aged persons is much less than that of their younger counterparts. Because they are less mobile, companionship and other activities which satisfy their interests must be located within a distance that can be easily traversed.
4. The size of the dwelling units within which many elderly persons reside is often limited due to economic constraints. This results in a greater need, and demand, for activity outside the confines of the dwelling unit.

No single set of criteria may be utilized to define a "desirable" environment for housing because of the differing psychological values of individuals. Some older individuals prefer to be isolated from active community life and this preference is reflected in the development of isolated buildings, housing projects, or entire communities intended for the exclusive occupancy of older persons. Other individuals prefer to reside within an atmosphere of an active heterogeneous environment. The aged period of life may last for decades during which the housing needs and desires of older persons may vary greatly.

To be successful, a planning agency's housing program which reflects the needs of older persons must consider the various preferences of individuals and accommodate a wide variety of environments for residential living. Because individual living preferences are molded by past experiences and a "natural" resistance to change, these environments may be expected to include rural, suburban and urban settings.

The expressed preferences of older individuals for housing types and locations should not, however, serve as the only determinant in development practices, as these preferences may be either incomplete or unrealistic. For instance, the desire to associate with persons of similar age often means similar age and social background. A distaste for public housing is most likely based upon impressions derived from existing public housing developments which are poorly designed and/or

located. The desire to stay in the "old" neighborhood may reflect a perhaps wishful desire that the "old" neighborhood shall not change. This latter preference may also reflect an acknowledgement by the older person that he, or she, lacks the financial means to leave that neighborhood. Consequently, housing arrangements contrary to expressed desires may be completely satisfactory if they satisfy basic social needs.¹

Economic constraints upon the production of housing must also be considered as a tempering factor in housing production efforts. Those aged persons with the financial resources adequate to obtain housing which meets all their preferences are most fortunate. However, the vast majority of all households in this nation cannot afford this luxury and must adjust their preferences to balance their budgets.

THE NEIGHBORHOOD WITHIN THE REGION

The quality of residential life is related to the availability of community services and these services vary tremendously when considered on a regional basis. Basic services expected by all persons include road construction and/or maintenance, drainage systems, policy protection, education and public health programs. The need for such additional community services as water, sewerage, fire protection, and solid waste collection and disposal systems rise with higher

¹Wilfred S. Lake, "Housing Preferences and Social Patterns", Social and Psychological Aspects of Aging, ed. Clark Tibbitts and Wilma Donahue (New York: Columbia University Press, 1962), p. 347.

densities of development. Other community services such as welfare, legal assistance, mass transit and recreation are of special significance to persons with low- and moderate-incomes, especially the elderly.

The provision of community services is largely dependent upon their demand and the financial constraints associated with service delivery systems. This constraint will always exist, regardless of funding levels; and the total demand or need for services will never be fully satisfied. The absence of various community services usually has the effect of limiting housing choice and conflicting with housing preferences. This is especially applicable to the elderly who are more dependent upon these services than are most other elements of the population.

Primary objectives of community development programs are to minimize those differences which arise between demands for community services and those constraints which inhibit that demand from being met. Residential development, conservation, rehabilitation or redevelopment programs must be coordinated with the development and staging of commercial and employment centers, utilities, transportation, open space and other public services.

In regard to low- and moderate-income housing developments, the Department of Housing and Urban Development has taken action which should support the objective of coordinating community development. Project Selection Criteria for the evaluation of rent supplement and

low-rent housing assistance applications deal with this objective. Specific objectives included within the published criteria as a rational for their adoption are the following:

- "1) To assure that the proposed development is consistent with the principles of orderly growth and development.
- 2) To prevent urban sprawl and the premature development or overdevelopment of land before supporting facilities are available.
- 3) To develop housing consistent with officially approved state or multijurisdictional plans.
- 4) To encourage the formulation of area-wide plans which include a housing element relative to needs and goals for low- and moderate-housing as well as balanced production throughout a metropolitan area. "²

Many diversified activity centers with a full complement of urban goods and services either exist or are in the initial stages of development throughout this nation. Additional smaller centers with more limited facilities and services are also scattered throughout the nation in the form of suburban types of commercial areas and moderate and smaller urban places in rural areas.

These concentrations of activity are, in turn, natural focal points for public service systems. They also represent the only areas where the opportunity exists to provide a wide range of social services without the cost of those services reaching astronomical proportions.

The planning agency, when attempting to measure the adequacy

²Department of Housing and Urban Development, Project Selection Criteria (Columbia, S. C.: HUD, 1972).

of housing in a given community, must relate that community to the region in which it is located. The planning agency should also recognize that rural, semi-rural, and suburban locations are not well suited to the needs of older households because of the limits upon social services available. Thus, we must be prepared to accept higher levels of concentration of older people in those areas best prepared to provide supportive services.

There are many advantages to the encouragement of older persons to remain within the well established neighborhoods of our central cities and to gravitate from rural settings to the smaller urban places scattered throughout this nation. In general, these areas offer a variety of existing public and private facilities for the aged to make use of; there is a greater number of specialized services and facilities geared to meeting the needs of the aged, and there is usually a public transit system available. All these factors encourage a greater independence of activity among the aged which in turn promotes their self-assurance.³

Unfortunately, the older areas of our central cities and smaller urban places are often functionally obsolete and in various stages of social and physical disintegration. The opportunity for independent living is enhanced by an atmosphere of comfort and security. When living in or near unsafe neighborhoods many of the elderly are

³ Philadelphia Housing Association, Toward Independent Living, p. 7.

reluctant to leave their residences for fear of being assaulted or robbed. The elderly in these neighborhoods do not generally exhibit a desire to remain in or near their old neighborhoods if suitable housing can be found elsewhere. Memories are marred by discomfort and fear and past neighbors missed. To large numbers of the aged, urban decay is an especially significant factor influencing their lives.

Restrictions upon the choice of housing available to older persons to well established stable neighborhoods often increases the demand for housing within those areas, which may result in inflated land and housing prices. In order for most elderly persons to be able to financially manage to reside comfortably within the more stable neighborhoods of our urban areas, federally subsidized housing with associated income limitations are a necessity. To improve the environments within which many of the elderly reside and to provide the economic incentives required for the sponsorship of low- and moderate-income housing, urban renewal and redevelopment activities are also a necessity.

SITE EVALUATION CRITERIA

In addition to those relatively broad considerations applicable to neighborhoods, there are a number of more specific site selection criteria which deserve attention regardless of the type of housing for the aged under consideration. Generally, a site contemplated as a locale for a housing development for older persons should be subject to the following considerations:

- 1) Feelings of dignity and self-respect should be promoted by providing opportunities for privacy and freedom of movement.
- 2) Safety and convenience should be promoted both within dwelling units and in public areas.
- 3) Access to necessary services and recreational facilities should be convenient.

A site which is too large is subject to as many disadvantages as is a site which is too small and congested. The poor arrangement of a building or buildings within a large site may serve to isolate or segregate the people within them from outside community activities. If a person must walk a great distance to reach the community, even a perfect neighborhood setting is of limited value. Transportation becomes a critical factor within the site if it is too large.

Large developments for the aged, do not pose as large a problem in site selection as a small project. This is because the large establishment creates a "neighborhood" of its own and requires large tracts of land. Large developments usually find it to be economically impossible to obtain central locations in the city and space must be found in suburban fringe areas.

The proper size of the lot upon which a housing project for the aged is located depends upon the number of people to be housed, type of structure, and the facilities in the area. The grounds should be spacious enough to avoid congestion and promote out-door activity.

Physical Features

Topographical limitations on site development should be respected and the aesthetic potentials of the natural site maximized within the site and structural design process. The grade should be minimal while allowing for proper drainage and located away from natural hazards, such as hills with unprotected precipices, open water, or deep woods. Relatively level sites encourage walking which is a highly desirable form of exercise. Sites which require steep walks, ramps, stairs and highground floors should be avoided as these features represent potential hazards to the aged.

The site should be sheltered from prevailing winds and polluted air because many older persons suffer from rheumatic problems and upper respiratory infections. The site should also be free from the threat of inundation and have adequate subsoils and drainage to prevent slides and subsidence. Shade trees, gentle slopes and curving walkways contribute to the pleasant livability of a site. It seems unnecessary to comment upon the need for sunshine and fresh air. Highrise structures either on the site or adjacent to the site may have the effect of causing excessive shade.

The proper location and arrangement of sitting or recreation areas deserve special consideration.⁴ In general, passive recreation

⁴Beyer, p. 437.

areas should be secluded while planned to offer interesting views. Many of the aged enjoy watching the occurrences which take place in their environment. Variations from normal activities become matters of concern or speculation and interest. A location in the countryside is unable to provide this type of interesting view or activity.

The desirability of promoting social contact among the aged suggests that sitting areas and pedestrian paths of movement should be interwoven. Such areas prove to be interesting places to rest in while also providing an opportunity for pedestrians to rest or carry on a conversation with friends.

The degree of integration which should be achieved between various age groups represents another aspect influencing the setting of housing for the aged. "The most desirable arrangement would appear to be one which permitted a gradual transition from highly private to highly active public areas."⁵ For example, it is often felt that children tend to cause the aged the greatest annoyance and therefore should be isolated from direct contact. A more satisfactory provision would be to arrange for the aged and children to have access to exclusive areas which would insure their respective privacy. Contacts between generations should normally occur in areas designed to facilitate that objective.

Outdoor service facilities such as parking lots, drying yards,

⁵Housing Research Center, Design Criteria, p. 69.

incinerators, etc., should be frequently and conveniently located and properly shielded. Off-street parking space should be provided on the site to prevent overcrowding neighborhood streets and to encourage visitors. The proportion of older persons who are financially and/or physically capable of operating an automobile is less than that for younger age groups.

Every dwelling unit should also have convenient access to a drive or street intended for vehicular use. Walkways to and from vehicles utilizing these drives should be short, direct and without steps. Service drives are not only useful for deliveries, etc., but also as a means of access and egress from vehicular modes of transportation. Thus, dwelling units for the aged should either be on the ground floor or within elevator buildings.

Accessibility

The site should not be bounded on all sides by major traffic right-of-ways. Older persons should be able to leave the site to go walking, shopping, etc., without having to cross major streets. "The decreased ease of movement and impaired sight and hearing of older persons lends special importance to the protection of the neighborhood against the hazards of automobile traffic."⁶

Most older persons place great importance upon the availability of services and facilities, whether they be of a convenience nature or

⁶Johnson and Pond, Journal of Gerontology, p. 258.

of a more essential type of service, such as health care, in their preferences regarding the environment within which they reside. Therefore, commercial facilities such as drug stores, groceries, laundries, etc., should be easily accessible from the site. Basic community facilities such as churches, health services, etc., should also be readily accessible from the site.

Commercial areas serve not only a functional purpose of supplying the older persons with daily necessities but they also serve as interesting areas to visit and observe. Older persons often enjoy shopping trips and such areas serve as an existing, or potential, source of part time employment which is most helpful when the economic status of older persons is considered.

The availability of medical services is a most important consideration in site selection and is largely dependent upon public services. Efficient emergency medical services should be available within a five minute response time limit, and physician services with complete health service support elements should be available within a twenty minute response time.

Church of the preferred denomination, libraries, and other recreational facilities such as parks and motion picture theaters should also be within walking distance of the site. Older persons usually have a significant amount of leisure time to devote to contemplation and recreation and the above services all contribute to the opportunity of the older person to spend their time in a meaningful and enjoyable manner.

An accurate estimate of what the normal "walking distance" for an elderly person would be depends upon the individual concerned. Some individuals enjoy walking and are able to cover great distances without strain or difficulty, while others may be able to walk only a few steps because of some physical frailty. The type of housing best suited to the needs of the individual older person is largely dependent upon his or her mobility capabilities. Obviously, dispersed and proximate housing is more suitable for the mobile; congregate housing would be more suitable for the less mobile, and protected living arrangements designed with on-site services would be best suited for those individuals with severe mobility problems.

The maximum reasonable distance an older person must walk to get to a facility if not excessive is closely related to its frequency of use. "A reasonable and comfortable walk for the elderly has been determined to be 2 to 3 blocks for most services frequently used and no more than 1/4 to 1/2 mile for most other needs."⁷ The chart on the following page includes recommended standards for the relationship of service facilities to the residence of an aged person as developed by the Philadelphia City Planning Commission. The standards shown were derived from interviews with elderly persons and the managers of projects in which they live.

⁷Philadelphia City Planning Commission. Locational Criteria for Housing for the Elderly (December 1968), p. 4.

Few localities are endowed with the entire gamut of services and facilities desired by older persons being located within a 1/2 mile walking distance. Therefore, inexpensive public transportation services are especially vital to the aged. Transportation is vital as a possible means of obtaining part-time work, to obtain preventative medical services, or to obtain other needs or specialized services which may not be within walking distance of the site. Authorities also encourage

Table 8
Facility Location Standards^a

<u>Facility</u>	<u>Importance</u>	<u>Critical Distance^b</u>	<u>Optimum Distance^c</u>
Supermarket or Grocery	Vital	2 blocks	1 block
Public Transit Stop	"	1 block	on site
House of Worship	"	1/2 mile	2 blocks
Medical Facilities	"	1/2 mile	on site
Drug Store	"	3 blocks	1 block
Laundry	"	1/2 mile	2 blocks
Beauty Parlor or Barber Shop	Not Essential	1/2 mile	2 blocks
Social Center	"	1/2 mile	on site
Bank	"	1/2 mile	2 blocks
Restaurant	"	1/2 mile	2 blocks
Department Store	"	1/2 mile	3 blocks

^aPhiladelphia City Planning Commission, p. 4.

^bCritical distance refers to the limit of comfortable walking ability by the elderly.

^cOptimum distance refers to the most desirable for fulfilling the needs of the elderly.

older persons to visit friends and relatives who may reside miles from the site, and, since close friends and some relatives are likely to be in the same age group, transportation is a vital factor for them also.

SUMMARY

Locational considerations involving housing projects for the aged must account for preferences, safety and convenience within a realistic framework of production constraints. Housing for the elderly should also be considered as an element of the total community within which it is located for its environment is as important as the dwelling unit itself. Thus, the evaluation of potential sites involves judgements of the potential of individual parcels of land and the neighborhood within which that parcel is located.

Housing for the elderly should promote feelings of dignity and self-respect which may only be encouraged by providing opportunities for privacy and freedom of action. Opportunities for privacy and freedom of action are, in turn, dependent upon security, convenience, and necessary services and recreational facilities. Such factors vary considerably through-out regions and neighborhoods, and those areas which lack services and facilities represent potential problem areas to residential use by aged persons. Areas with a full complement of facilities and services available to older persons, thus, should be accorded higher priorities in the allocation of public support to development possibilities.

Individual parcel evaluations within desirable neighborhoods involve physical characteristics and accesses. Primary considerations are again concerned with factors of safety, privacy and convenience of services and facilities which promote feelings of self-satisfaction.

Chapter 5

PRINCIPLES OF LOCATION

Principles of location, for housing for the elderly, provide planning agencies with general policy statements which serve to provide direction and character to this aspect of community life. They provide a reference against which the relative desirability of development proposals may be measured. They also provide a basic set of considerations upon which more detailed development decisions may be structured. When expressed as policy within community planning publications, principles provide developers with an indication of the most likely response of the community to specific development proposals. To be effective, therefore, planning principles must reflect community values concerning physical and social relationships.

The detailed application planning principles to obtain desired goals are implementation phases of planning programs. The implementation phase provides for the design and application of specific development programs. Planning principles provide form and direction to this design and application process.

Specific development proposals must also be considered in light of the social and cultural character of those persons the particular

development intends to attract as occupants. If the development is basically a speculative effort this added factor may be absent, however, many developments for older persons are specialized in their choice of occupants. Age limits, physical condition, income levels, social and cultural backgrounds, as well as the types of facilities to be included within the development represent various types of selective considerations. In many cases these selective considerations are so selective that the general "character" of future tenants may be estimated. Additional considerations would then be available for the evaluation of alternative locations.

When those factors and problems of aging discussed in Chapter 2 become a disability to older persons the housing site and locational considerations discussed in the previous chapter become especially meaningful. The local planning agency should be aware of the housing problems within its area of concern. This same agency should be willing to exert its limited influence upon the community to ease the negative effects of these constraints.

PRINCIPLES OF LOCATION

Principle 1. The factors and problems of aging justify that the elderly be recognized as an element of our population which deserves special consideration in the formalization of goals, policies and standards related to housing needs.

--Although considerations relevant to the location of housing for older persons reflect conveniences, or matters of safety, desired by persons of all ages, certain considerations are not equally applicable to persons of younger ages. For example,

most young families prefer locations close to schools and playgrounds. Younger persons are also more likely to welcome the opportunity to move to isolated locations, new neighborhoods, different communities, and to make new friends.

--The local planning agency must be cognizant of those variations in the individual problems of aging within the community, as well as, its capabilities to either resolve or lessen the impact of those problems. Housing needs of older persons will vary greatly according to their physical and mental health as well as their economic prosperity.

Principle 2. Older persons should be encouraged to remain integrated within a normal community or neighborhood social structure and in their own homes.

--Such situations promote the independence of older persons both physically and psychologically.

--Older persons seem to prefer independent living and appear to be physically and emotionally healthier in their own home.

--Older persons are often hesitant to leave familiar neighborhoods and social environments. If these environments are suitable to their needs they should be encouraged to remain.

--Older neighborhoods including concentrations of older persons which are experiencing social problems should, thus, receive high priorities in the implementation of public safety, welfare, and other neighborhood improvement programs.

Principle 3. Housing being made available to the aged should include a variety of housing types for all income groups and social strata.

--The preferences of the elderly for various types and locations of housing vary with individual life experiences, education and personality traits.

--Opportunities for older persons to move into housing suitable to their physical and economic capabilities should exist. In a large number of instances this opportunity can only be provided through subsidized housing developments.

--A range of choices can be applied to housing production programs including the size of the development, building types, and the degree to which the aged are in proximity to persons of other age groups.

--The needs of older persons for various types of housing would vary with their capability to live independently. This capability will vary over time as will individual housing preferences. Essentially, housing programs should be closely tied to health programs which involve nursing home care. The older person should be able to adjust his housing condition without having to leave the neighborhood of his choice.

Principle 4. Opportunities for older persons to socialize with persons of other age and social groups should be encouraged by insuring that areas suitable for this purpose are available either on the site or nearby.

--A broad population age and type composition within a neighborhood can increase its interest and spirit, and inhibit trends of isolation and alienation which are more likely to arise in neighborhoods composed of only a single family type, age group or income level.

Principle 5. Opportunities for older persons to socialize with persons of the same age and social background should be encouraged by insuring that areas suitable for this purpose are easily accessible from the individual dwelling units.

--Friends and peers assist in legitimizing life styles which normally change during the aging process.

--Leisure time is an excessive resource of many older people and friendships assist in the enjoyment of this resource. Every housing development for the aged should include areas for recreation and socializing. Areas should be designed to provide views of active neighborhood scenes.

--It should be acknowledged that the great majority of older persons are females and many social and other programs will normally be oriented to a largely female population.

Principle 6. Housing for the elderly should be related to those commercial, educational, recreational and other related service systems which should originate from the neighborhood within which that housing is located.

--Housing alone can not provide for more than a small part of the total range of environmental factors which make residential life socially and psychologically pleasing.

--Beyond providing for the daily necessities of life, such systems reinforce the older persons feeling of independent living and serve as entertaining forms of leisure time activities.

--Service systems should be located within a short walk of housing units occupied by older persons, and, such systems should not normally be so crowded or active as to raise fears for physical safety or mentally confuse older persons. This principle refers to neighborhood scales of activity rather than major commercial-governmental centers of community or regional impact.

--Examples of those neighborhood services most desirable would include the following:

1. Supermarket or Food Retailer. A preference has been shown for supermarkets rather than smaller grocery stores because of lower prices, better quality products and a broader selection of items.
2. Place of Worship. Several studies cite this facility as filling the purpose of a social center although its fundamental function is to serve both as a religious center and as a source of psychological support.
3. Primary Health Care Facilities. These facilities would include a physician's office, a clinic or a hospital with out-patient services which would provide primary and preventative health care services.
4. Drug Store. A source of supplies is necessary to maintain medical care.
5. Laundry. If such a facility is not installed on the dwelling site, there should be one conveniently located.
6. Beauty Parlor or Barber Shop. These are often frequently used facilities which provide support for individual self-esteem.
7. Social Center. This facility promotes communication among the elderly and frequently provides the elderly with a means for involvement in society.
8. Department Stores. Such entities serve primarily as places of entertainment in which shopping for pleasure may take place.
9. A library, post office, news-tobacco store, movie house, bar and a variety store represent additional types of facilities which vary in importance to the living patterns of the elderly.¹

¹Philadelphia City Planning Commission, Locational Criteria, p. 3 and 4.

Principle 7. Inexpensive mass transit should be available to the occupants of housing developments for older persons.

--Preferably, mass transit routes would provide for access to the system from stops adjacent to the housing site. In any case, the older occupants of housing developments should not be located farther than a short walk (1/4 mile) from mass transit services.

--Few neighborhoods include the full range of services persons may desire access to. Mass transit provides access to the assets of the total community as well as enabling the residents to visit friends and relatives.

Principle 8. Those geographic areas where community services are most varied and convenient are more suitable locations for housing for older persons than are more remote locations.

--Therefore, higher densities of development and older persons in these areas are often socially and economically advantageous.

--Concentrations of dwelling units provide greater individual opportunities for choice of size and style.

--Limited degrees of concentration of housing for older persons enhance the formation of friendships and enable the community to provide those facilities and services which support independent living on more of an economical basis. Economically it is impractical for the public to provide those public services which encourage and prolong independent living to a target population thinly scattered across service areas. Ideally, individual concentrations of older persons would include no more than forty (40) dwelling units. Developments exceeding one hundred (100) dwelling units seem to acquire an institutional atmosphere and, in independent living situations, this should be avoided. Agreement upon the ideal number of dwelling units within individual housing concentrations for elderly persons is a subject of disagreement. The family status of older persons, their physical and economic status, and, the environmental setting of housing developments represent variables which influence their ideal size.

Principle 9. Health and physical safety are primary concerns of elderly persons and attention should be directed to these concerns in site location and design decisions.

--Sites should be avoided which are subject to traffic hazards such as major highways or arterials and railroads.

--Natural hazards such as hills with unprotected precipices, open water, or deep woods should also be avoided.

--Areas subject to unusually high concentrations of air pollution should be avoided.

--Grades should be minimal and sites which require steep walks, ramps, stairs, and high ground floors represent potential hazards to the aged.

--All areas should be well lighted and sheltered outdoor areas provided.

--Centers of activity should be connected by short and direct paths for movement, without steps.

--Every dwelling unit should have convenient access to a drive or street.

Principle 10. Probable trends and plans for changes in land use patterns of the neighborhood within which the housing for the elderly is being considered should be prime concerns to both the local planning agency and the interest sponsoring such developments.

--Any variance from provisions of existing development controls should be based upon a full realization of the possible long-term effects of these variances upon other aspects of community life. The justification for a variation should be very well documented. This is particularly true in the case of the elderly.

--Social and physical change are inevitable within neighborhoods. The effects of probable change should be considered in respect to its impact upon housing developments.

In summary, the problems of the aged are largely the problems of our society, their problems are receiving a great deal of attention within all levels of government. Social Security, Medicare and Medicaid, Urban Renewal and Rehabilitation, Model Cities, Mass Transit, etc., have all been of great benefit to the elderly.

Unfortunately, very few, if any, of these programs have been adequately financed and have had little opportunity to prove their merit. "Now the problem of housing the aged is only one part of the larger problem of restoring old people to a position of dignity and use."²

Local levels of government should encourage the development of a variety of housing types for the aged, as well as, recreational and other activity oriented programs to occupy their leisure time. Housing for the aged, thus, should be considered as an integral element of residential neighborhood conservation or development programs by local communities. This approach encourages a wide distribution of housing facilities for the aged in well defined neighborhoods of sufficient size to enable the provision of economic community services while encouraging feelings of independence and community acceptance among the aged.

²Lewis Mumford, "For Older People--Not Segregation but Integration," Architectural Record (May, 1956), p. 191.

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