

MEAP AS A METHOD OF ASSESSING INSTITUTIONS FOR ELDERLY PEOPLE¹

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Abstract: The aim of the article is to describe the MEAP (Multiphasic Environmental Assessment Procedure) method which had and may have in the future many practical applications in management of care settings for elderly people. The author starts with presenting a methodological foundations of the method, then shows the construction of the tools and diagnostic techniques within the method. As the method turned out to be helpful and may still be helpful in management of settings for senior citizens, the author presents its practical applications in different areas (scopes) of social policy institutions' functioning (including care settings) in several countries. Finally the author sums up the advantages of the MEAP method which emerged due to previous applications.

Keywords: elderly people, the quality of a stay in a nursing homes or a day care centers, assessment of institutions for elderly people.

1. Introduction

Institutions for the elderly, both round the clock and day stay, are as much institutions from the point of view of the social policy of the state or local governments, as well as organizations aiming to achieve the objectives set out in legal and economic measures. Their primary goal is to provide care and meet other important needs of senior citizens who are inmates. The implementation of this goal involves the activation of various material and human resources through various formalized activities and processes (including procedures). These actions, processes and decisions necessary to achieve the set goals is management.

¹ This article is based on the characteristics of the MEAP method presented in Scheidt R.J.: The Social Ecological Approach of Rudolf Moos, [in:] Scheidt R.J., Windley P.G. (eds.): Environment and Aging Theory: A Focus on Housing. Greenwood Press, Westport, Connecticut, London 1998, pp. 111-139. The text on similar issue has been published in my recent book. See: Niezabitoski, M. (2018). Środowisko zamieszkania w doświadczeniu osób starszych. Wybrane aspekty psychospołeczne w ujęciu socjologicznym [residential environment in the light older people's experience. Chosen psychosocial aspects]. Gliwice: Wydawnictwo Politechniki Śląskiej [Silesian University of Technology Publishing House].

At the interface between these activities of staff and executive managers of the facilities and the human resources of residents, mechanisms are activated and impacts arise affecting the quality of life of seniors using the centers 24 hours a day or a daily stay. The institutions in question are very complex organizations, and their management covers many aspects of their functioning in everyday practice of their heads and staff. The institutional analyzes of such institutions used so far in social sciences were rather focused on analyzing their compliance with the standards in force at the time, sometimes presenting the assessment of these institutions by seniors and staff (Szarota, 2010). On the other hand, Rudolf Moos, whose multifaceted approach to this issue will be characterized in this article, proposed and tested very extensive evaluation tools of various institutions in order to obtain guidelines for carrying out changes improving their quality of functioning. He researched the detailed, carefully selected aspects of these institutions and the adaptation of seniors to their internal environment. His method and analytical procedure were to enable not only diagnostic or intervention tests, but also purely cognitive ones. The concept of the facility's environment and its impact on humans, on which Moos and his team relied, is multi-faceted, and the author himself presents the elements and aspects of this environment as a system (compare Niezabitowski, 2018, p. 58). One of the elements of this system is the "social climate".

2. Social-ecological approach of Rudolf Moos as a theoretical foundation of MEAP

The integrated model facilitating the understanding of many well-being determinants of older people is the result of the work of the team of Rudolf Moos from the Social Ecology Laboratory at Stanford University (USA). Moos used the socio-ecological approach for 20 years in assessing the impact of individual and environmental factors on the adaptation of seniors to life in institutions (Scheidt, 1998). Social ecology in this sense is a multidisciplinary study of the impact of physical and social aspects of the environment on people (Moos, 1976, p. 31; after: Scheidt, 1998, p. 111), whose main goal is to improve the quality of the environment for the sake of the quality of life of the inhabitants. The roots of the socio-ecological approach should be sought in behavioral ecology studies, which emerged from empirically grounded beliefs of early behavioral science theorists that the living environment of people can significantly influence their behavior (Barker, 1968; Brunswik, 1955; Lewin, 1935; Murray, 1938; after: Scheidt, 1998, p. 112). The achievements of these theoreticians, as well as the state of earlier gerontological research, contributed to the flourishing of studies in the field of the ecology of aging over 35 years, from the 1960s to the 90s. As Lawton (1985) noted, the fascination with the environment by behavior theorists provoked the enormous

potential use of gerontological knowledge in the design of housing, institutions and even settlements for the elderly (Scheidt, 1998).

The development of Moos's ecological and social perspective was basically outside the mainstream gerontology, and inspiration came from clinical experience rather than from environmental or social psychology. In particular, research in the perspective of Person-Environment studies conducted in the 70s convinced him that the socio-ecological approach to the problems of the living environment of older people is necessary for an adequate understanding of their social functioning (Scheidt, 1998).

Before discussing the MEAP method and its application in greater detail, five characteristic features of the socio-ecological approach on which this method is based will be shown (Scheidt, 1998, p. 112-113).

Table 1.

Elements of the socio-ecological approach to the institutionalized housing environment for seniors, on which MEAP is based

A socio-ecological approach to the institutional residential environment of senior citizens	
1.	Understanding the environment from the perspective of the individual.
2.	Care for physical and social aspects of the environment.
3.	Taking into account the impact of the environment on humans in the concept of social climate.
4.	Orientation on practical solutions - seeking convergence between people's preferences and environmental resources.
5.	Raising the level of individual control over the environment - promoting the maximum efficient functioning of seniors in everyday life

Data sources: own description adapted from: Scheidt (1998, p.112-113).

Firstly, this approach is characterized by understanding the impact of the environment from the perspective of the human individual, and therefore with the "humanistic coefficient". In this respect, it differs from human ecology, which focuses on the opinions and attitudes of members of larger communities, including local communities. This approach combines elements of structural and interactionist perspectives (Altman, and Rogoff, 1987; after: Scheidt, 1998, p. 113).

Secondly, care for both the physical and social aspects of the environment is characteristic here. Moos assumed that they are inextricably linked and exert a mutual influence. This is clearly seen in MEAP studies.

Thirdly, although this approach focuses on adaptation and environments, it puts more emphasis on environments, in particular on those features that stress, restrict, select, liberate or create challenges. Such impacts were included in the concept of social climate, measured under the MEAP method.

Fourthly, the socio-ecological approach is oriented on the practical application of research results. This means supporting users of buildings and rooms with complete information about these objects. The specific goal is to maximize the convergence between preferences and environmental resources. This practical value meant that the focus was on older people, whose physical limitations and diseases force them to choose housing environments (locations),

which may limit their functioning in everyday life and personal development, and yet they should not have such impact; such interactions should be eliminated.

Fifthly, the orientation on practical values within this approach is to promote the maximum smooth functioning of seniors in everyday life (Insel, and Moos, 1974, p. 180; after: Scheidt, 1998, p. 114). This is not only a scientific but also a humanistic approach. Raising the level of people's control over the environment in which they live is a priority.

3. Basic measuring (diagnostic) tools within MEAP: PAF, POLIF, RESIF, SCES and some elements of their construction

The multi-component and multi-phase MEAP procedure developed by Rudolf Moos and Sonne Lemke consists of four tools such as: PAF, POLIF, RESIF and SCES corresponding to four basic issues related to senior homes, which are the physical and architectural dimensions of the institution's functioning, the institution's policy and program, assessment of the institution's social reality and assessment of the social climate (see: Niezabitowski, 2018).

The first two of the four MEAP diagnostic tools, i.e. PAF (Physical and Architectural Features checklist) and POLIF, are used to assess physical and institutional factors that determine the reality imposed on residents in facilities. Using relatively simple techniques they allow to capture and measure the objective features of the environment of these institutions for seniors.

The other two measuring tools, RESIF and SCES, are used to capture/assess the social environment of the facility. All these tools were combined under one method, which is a complex testing procedure called MEAP (Multiphasic Environmental Assessment Procedure) – a multi-phase/multi-stage procedure for assessing the environment of the facility.

This procedure is a consequence of the Moos theoretical model based on social ecology assumptions. Each of these four MEAP measuring tools is scaled². They contain questionnaire items if the technique is interrogative (conversational acquisition of information from the respondent) or other sets of data that should be filled in according to the actual state of the environment of the examined facilities. Each of these positions represents chances (opportunities) and resources in a given area of the institution's functioning.

MEAP allows you to evaluate facilities in four basic dimensions (aspects), and each of them is assigned a separate set of measuring tools.

² A detailed description of the measurement tools used in this method, as well as its conceptualization are presented in: Moos R.H., Lemke S.: *Multiphasic Environmental Assessment Procedure (MEAP)*. University Medical Center, Stanford, CA 1984. See Moos R.H., Lemke S.: *Evaluating residential facilities: The Multiphasic Environmental Assessment Procedure*. Sage Publications, Thousand Oaks, CA 1996.

The physical and architectural dimensions of the institution's functioning are evaluated using the PAF (Physical and Architectural Features checklist)³ checklist. The design of this measuring tool is based on the assumption (belief) that the quality of everyday life of residents of 24-hour outlets for seniors is strongly determined by the physical and architectural features of this environment. In total, all forms located in PAF include 153 items, allowing to assess physical environment resources.

The freedom of their access to services in the commune undoubtedly influences the quality of life of seniors. A special dimension of Community Accessibility is used to assess this aspect of the institution's functioning, which measures the distance of the institution from these services or institutions. This distance, expressed in physical units (meters), is treated as an indicator of availability. It should be remembered that this accessibility is also affected by the way a person travels this distance (on foot, by bus, car, bicycle or other means of transport).

Further dimensions of the functioning of the institutions included in the PAF are Physical Amenities and Social-Recreational Aids. They focus on capturing the presence of physical and architectural features of the buildings of these institutions, providing convenience and comfort.

The PAF checklist also includes three dimensions to assess the facilities' equipment with devices, architectural solutions, as well as other physical features that facilitate everyday life for seniors. These dimensions are: Prosthetic Aids, Safety Features (devices that guarantee safety, e.g. fall protection, help maintain balance, call for help), Orientational Aids (elements of the environment that facilitate orientation in the space of the building and its surroundings). The availability of space for residents and staff activities are devoted to two further dimensions: Staff Facilities and Space Availability. Most of the items in the PAF assessment forms for various aspects are completed based on direct observation of specific features of the facility's environment. Mostly two-stage nominal scales are applied, with variants yes – no, occurs – does not occur, is – lack, positive – negative. It is about capturing and writing down on the form the presence or absence of any feature or item of equipment. In this way one can also note the fact that the facility meets or fails to meet standards in some aspect. In any case, this gives you the opportunity to compare the actual situation with the applicable standards.

Another tool under MEAP allows to apply the quantitative indicators of the policy of institutions for the elderly and its impact on residents. It was called POLIF (the Policy and Program Information Form)⁴, which means the policy and program evaluation form of such institutions. As for the technical aspects of this tool, it is interrogative. Data, in accordance with the form diagram, are obtained in conversation from the administrators of the facilities and from other staff members competent in selected areas of the institution's operation. The measurement tool contains a total of 130 questionnaire items.

³ A brief description of PAF in: Scheidt R.J.: *The Social Ecological Approach ... op.cit.*, p. 118.

⁴ A brief description of POLIF in: Scheidt R.J.: *The Social Ecological Approach ... op.cit.*, pp. 118-119.

The degree to which behaviors, actions and activities are enforced on the residents is measured in two dimensions: 1) expectations concerning functions of everyday life (Expectation for Functioning), 2) Tolerance to deviations from social norms included in the regulations (Tolerance for Deviance).

In turn, the balance between individual freedom and the institutional regime is assessed in four dimensions (Scheidt, 1998, p. 119):

- 1) The degree to which regulations allow residents to choose their own lifestyle (Policy Choice).
- 2) The degree to which formal structures allow residents to influence what is going on in the facility (Resident Control).
- 3) Transparency of policy communication, policies and procedures (Policy Clarity).
- 4) Resident Privacy level.

The third bundle of dimensions of the facility assessment includes the scope of the possibilities of using the Available Health Services, Daily Living Assistance services and Social-Recreational Activity facilities in this facility (Moos, and Lemke, 1994; Timko, and Moos, 1991). It is about regulating the freedom, rules and frequency of making these facilities available to residents by management and other employees.

RESIF (the Resident and Staff Information Form)⁵ is one of the tools under MEAP that serves to assess the social reality of an institution. It was designed to capture 6 aspects of the environment of the facilities, which are a function of the characteristics of their residents and staff. The design of this tool is based on the assumption that the combination of the characteristics of the inhabitants to some extent defines a specific subculture, and this secondarily may affect the behavior of individual residents. The inspiration for this formula of institution analysis was research showing that these institutions become homogeneous in social composition through the processes of selection and social allocation of persons. In addition, this homogeneity in each institution is different, its proper, and directly or indirectly affects the quality of life of seniors in this environment (Lemke, and Moos, 1981).

The RESIF tool (questionnaire) contains 69 items, and data and information are taken from the residents' medical history and from personnel files.

Staff Resources captures personnel resources, and data obtained from them, taking into account experience, education and diversity, allow you to create a profile of cultural capital of employees of the facilities. In turn, Resident Social Resources estimates the current status of residents, taking into account demographic variables (such as marital status, education), which strengthen social competences, while Resident Heterogeneity measures the level of social diversity of residents.

⁵ A brief description of RESIF in: Scheidt R.J.: The Social Ecological Approach ... op.cit., p. 119.

The current state of functioning of residents is assessed under RESIF in three dimensions (areas):

1. Resident Functional Abilities – the ability to perform everyday activities and the degree of impairment in this area.
2. Resident Activity Level – indicates the degree of involvement in self-organized activities.
3. Activity in the Community – measures the extent of participation in activities outside the institution, in the local community, in the municipality, parish.

The most important tool in the discussed MEAP (Multiphasic Environmental Assessment Procedure) method is SCES (Sheltered Care Environment Scale)⁶, which is used to assess the social climate prevailing in facilities. The construction of this scale is based on the assumption that each institution as a human life environment has its own unique set of features, properties that give it unity and internal coherence (Lemke, and Moos, 1987, p. 20; after: Scheidt, 1998, p. 119). Another methodological assumption constituting the foundation of this tool is the belief that the features containing this social climate can be easily estimated by capturing their perception among the inhabitants of the examined institutions. The final construction of this scale was preceded by several years of research by Moos and colleagues, in which three dimensions of the social climate were distinguished: 1) relationships, 2) personal development and/or goal orientation, and 3) organization of the institution's social system and its vulnerability to change. The upgraded version of SCES contains 63 items for assessing the various dimensions that fall under the three categories (aspects) mentioned above.

The two dimensions of the relational aspect are consistency and conflict. An indicator of social cohesion is the degree to which the staff of the facility are helpful and supportive to residents and how much they support each other. The dimension of the conflict was reduced to the extent to which residents of the facility express dissatisfaction with it and criticism of other residents.

On the SCES scale, personal development is expressed in two measures: 1) independence and 2) self-exploration. Independence is understood here as the degree to which efficient residents are encouraged to take care of their everyday life, as well as the degree to which they are trained to be responsible for themselves and to set goals, and thus to manage their lives according to the possibilities still available⁷. Self-knowledge is understood here as the extent to which residents of the institution are encouraged to openly express their feelings, anxieties and concerns.

⁶ A brief description of SCES in: Scheidt R.J.: The Social Ecological Approach op.cit., pp. 119-120.

⁷ Building and maintaining the independence of seniors and their self-sufficiency is considered an important goal in education aimed at people in this phase of life. See: Halicki J.: Niezależność jako zasadniczy cel edukacji seniorów, [in:] Halicki J.: Edukacja seniorów w aspekcie teorii kompetencyjnej: studium historyczno-porównawcze. Wydawnictwo Uniwersyteckie „Trans Humana”, Białystok 2000, p. 16-18.

The concept of assessing the institution's social climate in terms of its social system contains three dimensions: 1) organization, 2) the impact of residents on the course and quality of their life inside this organization, and 3) physical comfort that they experience every day. The organizational dimension refers to the importance of order and the level of formal organization of life in the facility. It is also expressed to the extent to which residents know the lifestyle set out in the regulations, in the clarity of the prevailing rules of coexistence and procedures. The dimension of the residents' authority is supposed to reflect their impact on the institution's policy and its rules, as well as the level of their freedom from formal behavior that restricts their behavior and actions. Physical comfort is understood here as convenience, privacy, nice and aesthetic interior design, as well as pleasure (joy) of sensual contact with the physical environment created by the facility.

The SCES scale is based on methodological assumptions that guarantee the objectivity of the characteristics and assessment of the social climate of facilities. The results are independent of individual differences between the residents of the analyzed facilities. Research conducted at the turn of the 1980s and 1990s showed a moderate agreement between staff and residents. Since these assessments varied according to the type of institution, the researchers concluded that a reliable comparative analysis should compare the perspective of both groups functioning in the institution, because only then it gives the opportunity to highlight the characteristics of the institution or organization itself, and not people. The overarching goals of the SCES method are to characterize and analyze the differences in perception of social climate by type of institution (its supra-individual features), and not by psychological characteristics of residents. There is seemingly a contradiction here – because how should the social climate be independent of the characteristics of individual residents, since its assessment is based on their perception?

First, the assessment method was based on the assumption of the homogeneity of the social composition of the residents of the institutions, and then you can achieve a unification of assessments and perceptions. Secondly, the objective features of the institutions that testify to their belonging to a given type can be correlated with indicators of the level of satisfaction with selected aspects of the social and institutional environment of the facility. Based on such correlations, it was possible to distinguish types of social climate that favored the quality of life of residents in specific areas and spheres.

4. Areas of practical MEAP applications - past experience

The research of facilities conducted as part of the socio-ecological approach using MEAP and its elements brought several important practical benefits. These include the use of SCES (The Sheltered Care Environmental Scale) to formulate (make) environmental diagnoses/

assessments, as well as the use of MEAP as a method to determine the structure and process of care for senior residents.

The MEAP procedure can be used as a typical evaluation procedure, according to the action research formula known in social sciences, in which research is an integral part of the action⁸. This is a participatory method because seniors themselves are included in the process of transforming facilities for seniors. The MEAP procedure can be carried out in four phases (steps) to initiate and monitor program changes in housing environments specially organized for the elderly. These are the following steps (Scheidt, 1998, p. 129): 1) general assessment of the environment, taking into account both the perspectives of staff and residents/residents, 2) reflection on the results of the assessment among the staff and those conducting the assessment procedure, 3) planning and implementing changes, 4) again assessment of the facility to determine the effectiveness of the changes carried out.

According to Timko and Moos (1991 after: Scheidt, 1998, p. 129), this method has been successfully used in at least two facilities offering long-term care for seniors, improving the relationship between staff and residents as well as a sense of self-confidence and competence among residents. The MEAP procedure creates the possibility of developing functional profiles of care institutions for the elderly, and also allows comparison of results with the assessments of residents, staff and the quality standards of some institutions. Another very valuable advantage of this method is the ability to compare the perception of the social climate of the institution's environment by seniors and staff. In the light of the observations (reflections) of Thompson and Swisher (1983), who analyzed the perception of the rural care center among its residents and employees, the large convergence (compatibility) of assessments of both these groups is a consequence of the processes of selecting seniors for institutions, emphasizing the similarity of socioeconomic status and the health status of potential residents/clients (Scheidt, 1998, p. 130). If the concept of the facility is designed for users who meet strict criteria, it is easier to achieve a comparable level of satisfaction with this environment in seniors and staff than in outlets that focus on a more heterogeneous social composition of their clients. Based on the experience of Polish researchers dealing with similar issues, it can be concluded that in conditions of uniformity of residents' status, to which the functional profile of the facility has been somehow adapted, similarity of the hierarchy of needs, as well as sources of contentment and dissatisfaction can be observed (Chechelska, 2011).

Another study, carried out in the USA by Stein, Linn and Stein (1987) among 301 residents and 231 employees of 24-hour care homes for the elderly, showed that regardless of the quality of these homes, they were rated much more positively by the staff than by residents in terms of social cohesion, independence, the impact of residents on the functioning of institutions and the

⁸ More on the genesis and development of action research in: Kemmis S., McTaggart R.: Uczestniczące badanie interwencyjne. Działanie komunikacyjne i sfera publiczna, tłum. Łukasz Marciniak, [in:] Denzin N.K., Lincoln S.Y. (ed.): Metody badań jakościowych. Tom 1. Wydawnictwo Naukowe PWN, Warszawa 2009, p. 775-831.

freedom to express their opinions, perceptions and feelings⁹. Perhaps, this discrepancy is the result of a kind of positional mentality¹⁰ (Sztompka, 1989; cf. Sztompka, 2005, p. 176), which requires residents to perceive themselves in the structure of the institution, though to a small extent, as objects of care and procedures. On the other hand, the staff look after or implement procedures being the subjects of these activities, and, in addition, feeling responsible for the functioning of the institution and its quality, they see it as part of their image, striving to make it more effective and, as a result, satisfaction with their work. A great advantage of the authors' use of the method of assessing the "social climate" of institutions as part of the MEAP evaluation procedure was the triangulation summary of the assessments of seniors and professional experts. Even their convergence was observed. The results of this comparison showed that, adequately to objective and expert criteria, institutions with such standardized lower quality were also worse perceived by senior users than those with objectively higher values.

Transferring the MEAP evaluation procedure to British institutions¹¹ in the 1990s brought as much success (benefits) as the awareness that this method must be enriched with additional elements to adequately diagnose users' needs, preferences and perception. In British research, it turned out, among others, that, contrary to government recommendations to set priorities in the field of demand for municipal infrastructure, respondents, despite the lack of barriers to access to it, and therefore also despite the possibility of using it, assigned relatively little importance to such access. Therefore, research has refuted false assumptions about local social policy towards older people associated with specific institutions that constitute their living environment. What was treated as a priority by those creating the directions of this policy did not turn out to be a priority for its recipients.

In turn, another fact found in these studies turned out to be as much a success of the MEAP method as it was to show its deficiencies, requiring correction. This weakness was revealed when, contrary to the findings of an American sample study (Moos, and Lemke, 1984), British seniors, being clients/residents of similar institutions, declared significantly lower demand for social, technical and prosthetic devices facilitating everyday life, as well as strengthening solutions orientation in the space of facilities and increasing the safety of residents. This result did not seem credible to the authors of the study. The use of interrogative research techniques, based on the verbal declaration of respondents, according to researchers

⁹ The problem of convergence and divergence in the assessment of facilities made by residents / users and staff is discussed in: Scheidt, *The social ecological ... op. cit.*, p. 130.

¹⁰ The term "positional mentality" was used by Piotr Sztompka, who synthesized and generalized the concept of social structure. This author drew the most important meanings of this concept in the sociological tradition. According to him, positional mentality is a set of beliefs, stereotypes, views, ideas and perceptions about their place in society, which are characterized by certain groups and categories, mainly professional. See: Sztompka P.: *Pojęcie struktury społecznej: próba uogólnienia*, [w:] Sztompka P., Kucia M. (red.): *Socjologia: lektury*. Wydawnictwo „Znak”, Kraków 2005, p. 176.

¹¹ The study was conducted in a short stay psychogeriatric ward and in a long stay ward in a psychiatric hospital in Great Britain and in two houses within the housing estate for the elderly.

could decide that they did not comment on the importance of something that they did not perceive in their immediate environment. They didn't use such facilities, they didn't even realize their existence anywhere in the world, let alone their significance. According to researchers, British respondents could realize the importance of the above elements of building equipment, if those in which they lived every day were better marked, had a little more visual information facilitating orientation in space and finding the road, contained maps of municipal infrastructure and institutions, and hung on the walls pictures of staff and residents.

In the light of the above experiences of researchers transferring the MEAP evaluation procedure to other countries, the use of one technique, here interrogative, i.e. based on the declaration of states of consciousness, without interfering with the environment, which also creates needs, is insufficient. Hence the belief that triangulation methods must be used. Researchers using MEAP also recognized the need to use various sources of knowledge about the studied environment and its subjective quality in the perception of senior users¹². Adequate knowledge of these feelings, and thus the approved, desired quality of this environment, has been made possible by a combination of perspectives of different groups of seniors. It turned out that these perspectives, assessments, preferences and priorities differ depending on the user group. You cannot estimate the needs of one group based on knowledge of the needs of another. You need to examine the preferences of the group that is to be or is currently a user of the building, living environment. This approach underlies the development of participative variations of the MEAP method, which is used to create and modify the concept of the facilities so that they can satisfy the elderly customers to the greatest extent. Preference measures used in this method allow you to more effectively select the highest quality facilities from the point of view of a specific type of users. In addition, they direct the initial design of facilities, their monitoring, if necessary, also modifying the service package and internal policy. In this way, it is also possible to study the convergence between the imagined (desired by seniors) and the real features of the environment of the institutions created for them (Brennan, Moos, and Lemke, 1989, p. 55; after: Scheidt, 1998, p. 131). The use of such methods, as should be expected, could facilitate the adaptation of older people to the environment of the facilities when they are in them.

¹² In qualitative research methodology, the use of different sources of knowledge is called data triangulation. Norman Denzin proposed this procedure. See. Denzin N.: *The Research Act: Theoretical Introduction to Sociological Methods*. Aldine Publishing Co, Chicago 1970. I quote: Konecki K.: *Studies in qualitative research methodology: grounded theory*. PWN Scientific Publisher, Warsaw 2000, p. 86.

5. Factors determining/shaping the social climate and its impact on the quality of life of residents - controversy and tips for facility managers

Preliminary testing of the theoretical model of the "social climate" (see: SCES) has shown that establishments that have a higher level of democratization of internal policies as well as health and functional fitness of residents have greater opportunities to shape this climate than establishments with only one of these characteristics. This in itself seems to indicate that the social climate is a multifactorial interaction between the residents of senior homes and their (physical and social) environment.

As further analysis as part of testing the model has indicated, combinations of certain features of the environment of the facilities are associated with specific dimensions of the social climate. For example, a social climate characterized by cohesion and a large impact of residents on the policy of the facility and physical comfort, with high probability will prevail in centers that have more facilities, facilities and recreation rooms, meeting places and social integration, more freedom of movement and choice of space of life (Scheidt, 1998). In addition, it was found that in establishments with more staff (in proportion to the number of seniors), there is less emphasis on independence, and thus less influence of residents on the policies and practices of these institutions (Scheidt, 1998).

It also turned out that the similarity of the features of the residents and their homogeneity in status do not allow to predict the social climate of the facility intended for seniors. It convinced Moos that on the basis of superficial, but easily perceptible, too obvious (though objective) information about the institutions, it is impossible to obtain reliable knowledge about the experiences of seniors related to living and about the quality of their life inside this institution (Moos, and Igra, 1980, p. 96; after: Scheidt, 1998, p. 123). This is due to the obvious fact that quality of life is multidimensional and depends on a multitude of factors¹³. In addition, Moos and Igra (1980) suggested that increased freedom of choice of the environment and a sense of control over it, as well as enriching the offer of social and recreational activities available to residents should help increase coherence, independence as well as potentially the level of organization, impact and physical comfort. The House of Retired Priests in Katowice meets these criteria (Niezabitowski, 2018, p. 191-195). Its residents consciously chose this place to stay in retirement, they wanted to be there, they are among their own, because it is a homogeneous group, consisting only of priests. If this was the most important and accepted reference group for them, then most often they also accept/approve formal regulations regarding their way of life, similar to those which have been binding for their entire past life in the

¹³ Analogous to the quality of life, life satisfaction is a complex subject of research. Only a multidimensional approach can bring you closer to how you feel this satisfaction, and then it's best to use several research methods. See: Halicka M.: *Satysfakcja życiowa ludzi starych*. Akademia Medyczna w Białymstoku, Białystok 2004.

priesthood. Consistency is relatively easy to achieve, since many of them are familiar with the parish or seminary. Groups of friends quickly spend time together and support each other. Independence and comfort are great, because every priest has his own room with a kitchenette and a bathroom. The will to belong to the community of residents, acceptance of the reference group and prior knowledge of this environment are crucial for good adaptation to life in an institution with a specific social climate. This sense of belonging in analyzes and practical activities should be treated as an important element of this social climate. Homogeneity is not enough if it is not accepted. It must be a homogeneous group, whose members consider each other as a reference group, which significantly defines their identity. Even among the mentioned priests of pensioners gathered in one institution, not everyone likes to be among them, because they have other more important reference groups or/and do not accept the normative pressures of a small homogeneous group, demanding conformity in the pursuit of coherence¹⁴. Those who knowingly chose a special round-the-clock institution for retired priests, knowing and accepting its environment, rate its social climate very highly (Niezabitowski, 2018, p. 178-182).

Although the features of seniors using institutions do not automatically imply their social climate, Timko and Moos (1991b), when conducting research on the typology of that climate, expected that better knowledge of these types would help in the future to adapt individuals to appropriate institutions. In their studies on this issue, they assumed that centers for the elderly can be divided according to the social climate, among others for: supporting those under care, well-organized, in open conflict with those under their care, in suppressed conflict with them, insensitive to the needs of those under their care, gradually opening up to the needs of those under their care. In the light of the findings of these studies, the adaptation of seniors to stay was more successful in well-managed centers with a supportive climate or opening to the needs of residents. Those staying in institutions with a more supportive climate were characterized by better well-being, greater activity in the local community and the center, and moreover they used medical services to a lesser extent (Scheidt, 1998).

The already mentioned issue of homogeneity is one of the reasons to seriously consider what determines the social climate of institutions for seniors. Timko and Moos had such doubts, and therefore they criticized the theoretical model of climate accenting factors influencing the features and types of this climate. Timko and Moos (1990) interested in whether and to what extent, on the basis of easily perceptible features of the institution's environment, some aspects

¹⁴ Here is an excerpt from a priest who did not want to be permanently in the House of Retirees, because he was afraid of informal interactions, attempts by the community to write unwritten norms or expectations: House of Retirees - I was there for rehabilitation last year. And, sometimes I visit my friends there, [...] and let's say such a detail one, I couldn't sleep one night, at six o'clock I had an alarm clock set. At three to six, I look and at that moment I fell asleep and woke up at half past seven, already a mass. was. And I went to breakfast, and a friend immediately: Have you already left the Church? - some kind of malice (76 years, residing in the parish, Archdiocese of Katowice). In the way in which the respondent described the colleague's reaction to his behavior, he best expressed how much he did not accept such interactions. This statement, however, should not be read as evidence of the rejection of "brothers in the priesthood" as a reference group, but only as a choice of a different lifestyle. Not everyone likes to experience this community with all its consequences on a daily basis!

of their social climate can be predicted. Their attention focused on two of them (Scheidt, 1998, p. 124): 1) social support between seniors, in the SCES analysis, represented by the dimension of cohesion and conflict, 2) self-determination, expressed in the independence and influence of residents on their life in the facility. This intuition and the study designed on its basis were based on research showing that supporting relationships and self-determination are associated with high quality care and self-service of those under their care. Designing their research, Timko and Moos (1990) formulated two questions (Scheidt, 1998, p. 124). The first concerned the extent to which the social climate of the institution supporting and enabling self-determination is determined by the physical characteristics of the institution's environment, its policy and services as well as the social and demographic and health characteristics of residents and staff. The second was: in what circumstances actions to create a supportive environment may unintentionally weaken the sense of control of residents over their own lives and increase their dependence on staff?

The sample in this study involved 244 institutions (127 nursing homes, 55 residential care, 62 APT - independent living)¹⁵ from 20 states. They were examined using the MEAP procedure. The social climate perception of these facilities was measured by staff and residents in order to determine the potential differences in determinants of that climate, perceived by both groups. In each of the establishments, there were on average 2 times more residents than staff.

In the opinions of both groups (residents and employees), some beliefs about the relationship between physical and architectural features of the facilities and their social climate were confirmed.

When it comes to social support among older residents, respondents from both groups agreed that the environment of the facility, characterized by greater physical comfort, is also characterized by greater coherence, and where the residents have more effective support networks, there is a lower chance of conflicts (Scheidt, 1998). In the light of the opinions of the surveyed seniors, conflict reduction is also possible with a higher level of autonomy and a smaller number of residents of the facility. It is characteristic that, based on the discussed studies, with a high ratio of the number of staff employees to the number of residents, a small degree of independence of the latter is usually observed, and in these conditions they have social impact only in their own group, but minimal opportunities to influence employees (Scheidt, 1998).

It is also important in these findings that in the minds of staff and residents, facilities that provide a high level of care have more conflicts and offer less independence. These findings confirm the conclusions of previous studies showing that dissatisfaction of residents is likely to increase in institutions that lack privacy, pressure on conformism increases, there are clashes among residents and their dependence on staff is high in objective and subjective indicators

¹⁵ These are de facto 127 institutions analogous to Polish dps, 55 homes for seniors who are not bedridden but can no longer handle themselves in their current home environment, and 62 special housing estates with infrastructure and services for relatively fit seniors.

(according to respondents). In an institutional environment, which is not the natural habitat of a senior citizen, providing him with care largely means that he is dependent on those who provide this care, and because they are strangers, frequent being in close proximity to the inmate is felt by him as a violation of privacy. It is the object of care that needs to adapt more to its giver, who is a stranger and has no emotional connection with the mentee. And since the staff of the institution, unlike the family, is not the most important and closest reference group for a resident of a retirement home, they are exposed to the "social breakdown syndrome", which manifests itself in a low sense of self-attractiveness in exchange relations, as well as in taking on the role of a dependent and adaptive person¹⁶. This phenomenon in particular generates, and even strengthens, conformism to standards imposed by all who provide care and form the immediate surroundings of the inmate. In your own home environment or in other non-institutional environments, a combination of privacy and support is more likely to benefit seniors (Lawton, 1981; after: Scheidt, 1998, p. 125).

The processes already taking place in institutions for seniors, as well as those that can be run in them should be viewed as "connected vessels". The relationships between them reveal various studies. Those focused on autonomy and control in institutional housing environments show that residents are likely to remain very active and socially involved if they feel they can control that environment. However, facility managers are warned against creating a climate of freedom of choice and a sense of power that could put pressure on too much activity on less-efficient residents, and they might feel the risk of exclusion and alienation when they fail to cope with these requirements or simply do not accept them. The social climate of the facility can therefore be co-created by employees providing care services to seniors, and then their knowledge affects its character and quality.

As the features and socio-demographic structure of staff and residents in a given institution/center cannot be fundamentally changed, in the interests of optimal coexistence of both groups and their quality of life, according to Timko and Moos, both groups should be educated (Scheidt, 1998). For example, if we know that too many staff in relation to the number of residents are associated with the risk of reducing the feeling of independence of the latter, then the staff should be made aware that overprotection forces seniors to take the role of dependent and submissive, and this negatively affects their self-esteem, self-determination and quality of life. Similarly, if it is known that the social resources of residents significantly affect the social climate of the facility, then the staff could be sensitized to the need to take into account the diversity of competences of residents when building activity programs, as well as

¹⁶ "Social breakdown syndrome" is a theoretical category introduced by Jacek Zusman, which Joseph Kuypers and Vern Bengtson used as the foundation of their "model of social reconstruction" (see Cox, 1984 in: Synak, 1999, p. 146). According to these researchers, the loss of roles and subjectively significant reference groups deprive the elderly of feedback in interactions. In this way, a psychosocial vacuum is created around man, which promotes dependence on external sources of negative stigmatizing. The senior then accepts such stigma and, adapting his behavior to the expectations of the nearest social environment, can also assume the role of a dependent person. Kuypers and Bengtson decided that this negative phenomenon should be countered and therefore proposed a "social reconstruction model".

to the need to initiate contacts and stimulate communication between seniors when they experience barriers in in this regard (Scheidt, 1998).

6. Advantages and shortcomings of MEAP – summary

The method, although imperfect and not fully comprehensive, but multi-faceted in terms of approach, is suitable for studying large groups of residents of various categories of facilities for the elderly. This is a quantitative method. Suitable for comparing institution's ratings by employees and users (residents). It can probably facilitate large-scale verification of the validity of social policy assumptions regarding the quality of life in institutions, as demonstrated by the transfer of this evaluation method (MEAP) to the British reality. An extremely important achievement of the application of this method was to show that social processes in institutions, determining the quality of life of residents, are de facto connected vessels. This means that by starting one process with potentially (theoretically) positive consequences, another is automatically triggered, whose impact does not have to be beneficial. As a result of research, within this procedure, certain types of social climate were distinguished and empirically captured, showing their characteristic features and how combinations of certain climate features can affect the quality of life of residents. The advantage of experimenting with this method was supplementing it with triangulation procedures and the researchers' awareness of the need to enrich its applications with other methods; as should be expected, these should also be qualitative methods. One of the most important advantages of this procedure is its evaluation nature, but also participatory, because according to the action research formula, together with the participation of the recipients of activities, it is possible to transform the institution created for them, using their opinions, taking into account their preferences and needs.

Repeated case studies would be needed in the formal and empirical areas¹⁷ defined in the research, to determine, for example, whether socially homogeneous establishments and a decent standard of services provided automatically guarantee satisfaction with living (staying) in them?

It is difficult to accept that research on the social climate, or more broadly the social environment of institutions, would be carried out without a humanistic factor, even if this climate is largely influenced by objective factors. Objective criteria for assessing facilities must be verified through the prism of subjective or intersubjective criteria. This means that institutions should not be compared in isolation from the perception and characteristics of individual residents.

¹⁷ I mentioned the areas of formal and empirical qualitative research earlier in this chapter. See: Konecki K.: *Strategia badań jakościowych. Metodologia teorii ugruntowanej*, [w:] Konecki K.: *Studia z metodologii badań jakościowych*, op. cit., p. 28.

When it comes to linking climate with adaptation – especially for studies that recognize climate as an independent variable and sometimes dependent – it is necessary to crystallize and specify this concept, especially in empirical indicators. According to the author of this article, the typology of social climate and its relationship with other features of institutions can be better explored in qualitative research in specific empirical areas. You can start, for example, by "dealing with" the myth of homogeneity. Homogeneous facilities can be seen as a formal and empirical area. Such areas may also be features of facilities, such as supportive climate or facilities with a certain proportion of staff to residents.

What is subjective in the climate and complex, decides in the opinion of the author of this monograph about the need to include this issue in qualitative research. The following arguments particularly support this need:

1. The social climate of the facility, although objectively the same, is subjectively different, however - the same environment affects each person differently, as demonstrated by the environmental gerontologists, mainly Lemke and Moos (1989, p. 147; after: Scheidt, 1998, p. 129).
2. This climate is connected vessels – it consists of various elements and processes.
3. Checking how these various aspects, features (variables) and processes affect one another – that is, how these connected vessels function – is only possible by exploring empirical areas that represent specific features or sets of features and phenomena related to the environment of the facilities.

In addition to subjective features and complex phenomena, the climate of institutions is also determined by objective, evident, obvious features of the physical, human and institutional environment. The creation of a specific social climate can therefore be fostered by creating specific infrastructure conditions, as well as architectural solutions. Climate – as evidenced by the quoted research by Timko and Moos (1990), i.e. physical comfort resulting from architectural features of the environment, such as privacy or pleasant interior design in the sense of both residents/seniors and staff is an independent variable in relation to their ability to manage their own life (Scheidt, 1998, p. 124).

As for the objective factor of demographic nature, the number of inhabitants is important for the social climate of the institution.

From the cited arguments and research results as well as the results of MEAP applications, it can be concluded that the climate is the resultant of subjective, individual and objective factors shaping the facility's environment. Institutional practice needs solid, empirically and practically grounded knowledge to create a friendly atmosphere for seniors. This practice includes building institutions in the architectural, technical as well as social and organizational aspects. This organization includes the work of the staff and its impact on the elderly/residents. It is important for staff to have access to scientific knowledge, which they can then verify in their daily activities. Enriching these activities with this knowledge creates opportunities to improve the quality of services provided and the well-being of residents.

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