

HOUSING NEEDS AND SATISFACTION OF ELDERLY
RESIDENTS IN TWO CONGREGATE HOUSING
PROJECTS IN SAN JUAN,
PUERTO RICO

By

SARAH TOLEDO TOLEDO

Bachelor of Science in Home Economics

University of Puerto Rico

Rio Piedras, Puerto Rico

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Thesis Approved:

K. Kay Stewart

Thesis Adviser

George E. Argueth, Jr.

Christine T. Salmon

Norman D. Rankin

Dean of the Graduate College

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CHAPTER I

INTRODUCTION

The need for quality housing is basic for every individual. However, housing becomes increasingly significant in the lives of many aged families and individuals, because it is in the house that the elderly spend much time. The quality of this limited world largely determines the extent to which the elderly will retain their independence, the amount of privacy they will experience, how often they will visit with friends, their sense of place, and their ability to exercise a measure of control over their immediate environment (Montgomery, 1972, p. 37).

The elderly population is increasing in the world. Puerto Rico is no exception. The proportion of persons 65 years or over has increased considerably during recent years. In 1910 the elderly comprised 2.3 percent of the total population, but it had increased to 6.5 percent by 1970. According to data provided by the Puerto Rico Planning Board in 1976, the total population of the island was 3,319,000 inhabitants and 7.46 percent of them were persons of 65 years or over. There is no evidence to suggest that this trend has slowed since that 1976 report.

In Puerto Rico the average family income continues to be very low. In 1970, the last available data, the annual income of 64.3 percent of Puerto Rican families was below the poverty level. This percentage was even higher for the elderly. Of the total elderly population in 1970, 72.1 percent had incomes below the poverty level (Puerto Rico Census of Population /PRCP/, 1970, p. 1182). There is little evidence to suggest that this high level of poverty has declined significantly since the 1970 U.S. Census Bureau Report.

The poverty conditions of many elderly persons in Puerto Rico place them in situations of extreme economic deprivation. Several factors restrict the elderly from active participation in society. These factors include: 1) the lack of economic independence due to a compulsory retirement system or no secure income; 2) the very limited job opportunities because of the low educational level and/or the absence of skills; and 3) the social stereotypes of the elderly. Therefore, the opportunities to acquire goods and services, such as quality housing necessary for a satisfactory life, are extremely limited.

Puerto Rico needs to improve the housing conditions of this population in general. In 1977, there were 902,165 total housing units in Puerto Rico. Of these, 196,064 were in substandard condition (Puerto Rico Planning Board Social Abstracts, 1978, p. 6).

Quality of housing is greatly affected by the economic circumstances of the residents. Because of the economically disadvantaged state of the elderly, it is not surprising to find them living in poor housing conditions. According to the 1970 Puerto Rico Census of Population, in the Standard Metropolitan Statistical Areas, the housing conditions of the elderly were poorer than the housing conditions of families with younger heads of households. The housing conditions were worse for the elderly persons living alone. In 1970 there were 4,500 elderly living in housing located in areas identified as slums (Trinidad, 1970, p. 10).

Many elderly cannot afford the expense of improving their housing conditions. The elderly cannot qualify for long-term loans because of their age, their low, fixed incomes and their lack of sufficient capital or savings.

There are three main living arrangements for the elderly in Puerto Rico. Those arrangements are: 1) living in single unit households (i.e., house, apartment in private rental units, congregate housing projects for the elderly); 2) living with relatives; and 3) living in institutions for the elderly (i.e., nursing homes). In 1970 with a population of 177,077 persons 65 years of age and over, 132,454 were living independently in their own housing unit, 42,017 were living with relatives, and 2,606 were living in institutions (PRCP, 1970, p. 56). While these data are 10 years old they are still reflective of the situation as it exists today in Puerto Rico.

Congregate housing is a relatively new housing alternative for the low-income elderly in Puerto Rico. This housing type is comprised primarily of federally subsidized rental apartments which are designed for the elderly. There are 15 such housing projects in operation in Puerto Rico today and 13 of them are localized in the metropolitan area of San Juan. These housing projects are sponsored by governmental agencies or by private organizations (e.g., churches and retirement associations).

In Puerto Rico the elderly housing projects are composed of high-rise buildings. The size of the buildings ranges from 91 units in the smallest one to 356 units in the largest one. This congregate housing alternative demands that the elderly who move into the projects make certain adaptations in relation to the design of the environment and social contacts with neighbors, tenants, and administrative personnel.

In order to improve the housing conditions of the elderly in Puerto Rico and especially of those living in congregate housing for the elderly, it is necessary to analyze the elderly residents' satisfactions with this type of housing. To achieve this analysis, one must identify the aspects of housing which are important to the low-income elderly who are living in congregate housing.

Purposes and Objectives

The main purpose of this study was to survey the present housing condition of the elderly in Puerto Rico who are living in two congregate housing projects in San Juan, Puerto Rico that differ in terms of length of operation, design factors, sponsor, and location. The objectives of this study were as follows:

1. To examine the differences in characteristics of the respondents in the two projects.
2. To identify the aspects of housing which were of highest importance to older residents, and the aspects of housing with which the older residents were most satisfied.
3. To analyze the differences in importance of various aspects of housing for residents in the projects.
4. To analyze the differences in satisfaction with the housing for residents of the projects.

Hypotheses

The following null hypotheses were formulated to meet the objectives of this study:

Ho₁ There will be no significant differences between the projects Altergarten Las Teresas and Comunidad del Retiro in terms of amount of rent paid, amount of utilities paid and the method of transportation most often used.

Ho₂ There will be no significant differences in the sociodemographic characteristics of the residents in

Altergarten Las Teresas and Comunidad del Retiro.

Ho₃ The degree of importance attached to various aspects of housing will not differ significantly between residents of the two projects.

Ho₄ The degree of satisfaction attached to various aspects of housing will not differ significantly between the residents of the two projects.

Assumptions and Limitations

The assumptions of this study were as follows:

1. The elderly will have the ability to identify perceived importance of housing needs.
2. The interviewers can be trained to administer the questionnaire consistently.

The limitations of this study are as follows:

1. The findings can be generalized only to congregate housing with similar characteristics as the ones in the study.
2. The findings can be generalized only to elderly with similar characteristics.

Definitions

The following definitions were utilized in the study:

1. Apartment - a room or a combination of rooms, among similar sets in one building designated for use as a dwelling (The Random House Dictionary of English Language, 1971, p. 69).

2. Congregate housing for the elderly - Dwelling units occupied only by elderly, grouped together in apartment complexes, cluster housing, or condominiums, age-segregated or proximated housing (Morris, 1978, p. 224).

3. Elderly - Being past middle age (Webster Dictionary, 1976, p. 365). For the purpose of this study are all those persons of 65 years or older.

4. Household - Includes all the persons who occupy a group of rooms or a single room which constitutes a housing unit (U.S. Bureau of Census, 1973, p. 115).

5. Household head - The person designated as head by the members of the household if there are two or more. Also the person who lives alone in a household (Morris, 1978, p. 47).

6. Low-income - Families whose income is less than 80 percent of the median income for a particular area (U.S. Department of Labor, 1976). The median income in Puerto Rico for families with household heads of 65 years or over was \$2,939.00. The income below the poverty level for families with household heads of 65 years or over was \$1,332.00 (PRCP, 1970, p. 53-1258).

CHAPTER II

REVIEW OF THE LITERATURE

During recent years the number of people aged 65 and over in the United States has been increasing. By 1974 there were more than 21 million people in this age group (U.S. Department of Health, Education, and Welfare, 1975). Shelter is one of the important needs of all individuals, but especially of the elderly. Thus, housing needs of the elderly have been of increasing concern at the national level. This review of the literature presents information related to: a) the economic situation of the elderly, b) housing conditions for the elderly, c) congregate housing for the elderly, d) design considerations for housing for the elderly, and e) the satisfaction of elderly with congregate housing.

Economic Situation

As people progress through retirement years, problems of reduced income and physical impairment become numerous and more acute. Over the years, the median money income of older families has been consistently under half the median

for families headed by younger persons, i.e. \$6,426 versus \$12,935 in 1973 (Brotman, 1976).

The median income of the elderly in Puerto Rico has been extremely low. In 1970, the median income of persons over 65 years of age was \$2,939 (PRCP, 1970, p. 1258). This amount was below the median income of all the families in Puerto Rico, that was \$4,411 (PRCP, 1970, p. 1258). The income of the Puerto Rican elderly originated from different sources. Based on 1970 Census data, 40 percent of the elderly households received income from earnings, 72 percent received income from Federal Social Security, 16 percent received income from the Public Assistance Department, and 10 percent received income from relatives and community charities (PRCP, 1970, p. 1258). In most cases, even the combined income sources resulted in an overall low income for persons over 65 years of age.

Withdrawal from the labor force was the major factor affecting the low-economic situation of the elderly (Beyen, 1962; Brotman, 1976). Laether (1967) stated that there were two principle reasons for this: the decreased health conditions made the elderly less efficient and adaptable to jobs; and it was not practical for an employer to hire a person of near-to or already-retirement age.

The compulsory retirement system was another major factor that affected the low income of the elderly (Brotman, 1976). Social Security was the most common of the retirement systems for all the aged, but the income provided by

Social Security was generally low (Riessman, 1977). When retirement benefits replace earnings as the principle source of income, money income is reduced to from one-half to two-thirds of the previous earnings. Because there is no alternative income and the elderly are not able to make economic readjustments, a large proportion of the elderly have developed critical economic problems.

The inflationary situation of recent years made the economic situation of the elderly even worse. It hit people with fixed incomes very hard, especially the elderly who had little potential for improving their personal incomes by themselves. Their purchasing power permitted them a lower standard of living than was enjoyed by the rest of the population (Brotman, 1976).

Housing Conditions

Housing was one of the most important problems faced by low and moderate-income elderly households (Loether, 1967; Sears, 1976). Aside from his/her spouse, housing was probably the single most important element in the life of an older person. Most of his or her satisfactions were house-oriented and other satisfactions were bound up in the sense of home, so more and more of the elderly person's concerns were house-generated (White House Conference on Aging, 1971).

Living accommodations were of great concern to elderly people because they spent more time at home, and they had a tendency to be more socially isolated (Carp, 1972; Basse,

1969). Mathiew concluded that, "These living arrangements had consequences not only in terms of physical welfare, but also in regard to the older person's social and psychological well-being (1976, p. 155)."

Of the more than 20 million persons over age 65 in the United States, 95 percent lived in households, boarding homes, apartments, houses, housing-for-the-elderly projects, mobile homes, and with relatives. The remaining five percent lived in institutions. Two-thirds of the people living in households were homeowners (Newcomer, 1976). One-fourth of the total elderly who lived independently were alone, the larger group being women (Lawton, 1975; Brotman, 1976).

As a result of the low-income situation, many elderly were forced to spend a high percentage of income for housing. According to the Bureau of Labor Statistics (1970), housing costs were 34 percent of the retired couple's budget. Tucker (1975, p. 73) stated that "elderly families were twice as likely as younger families to be living in substandard structures, however, they preferred to live independently."

The elderly have to either make expenditures from their limited funds to hire services for the repair and maintenance of their homes or do it themselves. In five years (1965-70) the cost of buying and maintaining a home increased 80 percent. In those same years, elderly incomes increased only 40 percent (Davis, 1973). In spite of very low incomes, the desires of older persons to live independently, to remain in familiar surroundings, and not be isolated, were very strong.

Hoeskstra (1976) stated that the elderly's housing situation was also affected by some other limitations: 1) less ability to search for improved housing; 2) unsatisfactory location of many of the available housing stock; and 3) the limited opportunity for financial allowance and credit. Physical health declination and reduced ability for maintaining their dwellings were other factors that have contributed to this substandard housing condition (Leeds, 1973).

Low-income levels, poor health, desire for independence, desire to remain in familiar settings and the reduced availability of housing choices were the main factors that determined the living arrangements of the elderly (Newcomer, 1976; Wells, 1977). In general, the elderly preferred to maintain their own households and to live near children and relatives. Overall, they wanted to continue living with independence in their own territory (Loether, 1976).

According to data available, more than 60 percent of the independent elderly lived in metropolitan areas with the greater proportion localized in central city areas than in surrounding suburban areas. Relatively small proportions of older people were living in rural areas (Lawton, 1975).

Bild (1976) and Lawton's (1975) research findings stated that most of the inner city elderly residents owned their own homes. However, the other main alternative was rented apartments.

The renting of apartments by the elderly is growing in popularity because of economic reasons. Rented apartments are less expensive than houses to keep and maintain by low-income elderly. Also government subsidized housing programs for the elderly offer rental apartments rather than homes for purchase.

Other reasons presented by Hanson (1977) for the elderly's preference for renting instead of owning are that many elderly feel they cannot buy a home because they probably would not live as long as the terms of the loan. Continuing to live in a home that is owned can be problematic because the house may not be located at a convenient distance from the places that the elderly residents need to go.

Congregate Housing for the Elderly

As was stated by Parker (1979, p. 21), "congregate housing is a lifestyle trend currently on the upswing." Congregate housing for the elderly are dwelling units occupied only by elderly, grouped together in apartment complexes, cluster housing, or condominiums, age-segregated or proximate housing (Morris, 1978). This housing alternative permits the elderly to continue living independently in the community rather than in institutions or with relatives.

During recent years, a considerable number of the independent older people have moved to housing designated for the elderly. As was stated by Carp (1977) in 1977

about 600,000 elderly were living in special housing projects for the elderly funded by the Housing and Urban Development. These complexes were mostly high-rise buildings and were localized in metropolitan areas. Both public and private organizations can sponsor the construction of these projects.

Congregate housing for low-income elderly is a relatively new alternative in Puerto Rico. The federal government, through the Department of Housing and Urban Development, is providing housing designed for elderly with subsidized rents (see Appendix C, p. 120). This new housing alternative offers a remedy for those elderly in the low-income group that cannot afford the expenses of a house.

In order to qualify for this housing, the persons in Puerto Rico must be 62 years or over and have a median income of no more than \$2,500 (H.U.D. - Circular L.M.P.D., 1978). Many elderly in Puerto Rico qualify because the 72.1 percent of elderly had incomes below poverty level (P.R.C.P., 1970, p. 1182).

Design Considerations for Housing for Elderly

McGuire (1957) stated that design standards for housing for the elderly should be based upon recognition of the ways in which age and accompanying infirmities affect a way of living. There are differences among the elderly such as

differences in age, alertness, individual resources, degrees of dependency, and motivation.

According to Green (1975) high-rise and medium-rise apartment buildings have become the customary solution for housing for the elderly. The major factors for this are: 1) land cost is too high in urban areas, b) site development costs are lower, c) the compact building configuration facilitates the delivery of social, recreational, and safety services, d) the sites that are closer to shopping, transportation, community facilities, etc., were frequently smaller sites, and e) the tremendous housing needs of the elderly.

The projects designated for elderly must be designed in accordance with the appropriate H.U.D. Minimum Property Standards (Morris, 1978). Buildings are designed to meet special safety requirements, wider corridors are included, non-slip flooring is installed, shelves and electric outlets are lower than usual and grab bars are provided (H.U.D. Transmittal No. 5, 1978).

As was stated by H.U.D. Transmittal No. 5 (1978), the apartments in housing projects for the elderly may be efficiency or one-bedroom units and no more than five percent in the whole project may be two-bedroom units. All units must include a kitchenette or a kitchen.

If housing is to be a viable support system for a wide variety of life styles and conditions, it is mandatory that it be planned, designed and built in a manner that will

maximize older people's chances to realize certain basic needs. According to Montgomery (1972), the basic needs that have to be satisfied by the elderly are:

- 1) independence - the supply of an environment with physical features which enables each person to maintain his own household;
- 2) safety and comfort - the supply of an environment free of physical barriers;
- 3) wholesome self-concept - the supply of quality housing which contributes to a feeling of self-respect and dignity;
- 4) sense of place - the supply of an environment that promotes a feeling of identification with familiar surroundings;
- 5) relatedness - the supply of an atmosphere that promotes the interaction with others;
- 6) environmental mastery - the supply of an environment in which the elderly can exercise some measure of control;
- 7) physiological stimulation - the supply of physical surroundings in which a variety of stimuli are present; and
- 8) privacy - the supply of an environment which meets the needs of privacy in both auditory and visual manner (p. 39).

Comfort, circulation space, and safety have been identified by various researchers as important considerations in the creation and maintenance of optimal environments for the elderly. Recommendations related to the provisions for comfort, circulation space and safety are discussed in the following section.

Comfort

According to various studies, privacy and independence were the most important needs of the elderly for the determination of comfort in their housing arrangements (Ewald, 1967; Newcomer, 1977; Newman, 1972). For older people the feeling of privacy is highly dependent upon the physical environment. Lack of privacy was demonstrated to be an important factor in nervous breakdowns and physical collapse

(Carp, 1976).

According to Carp (1976, p. 19) "independence is the most desired personal attribute." "The most dreadful possibility to an old person is that of becoming a burden to others." As long as people can take care of their own needs, they have a sense of independence.

In order that the elderly achieve those mentioned needs, Loether (1967) identified the design features that housing experts considered desirable when constructing housing for the elderly. Those design features were: a) adequate system of temperature and climate control; b) adequate sources of both sunlight and artificial light; c) adequate control of sound and noise; d) an efficient design for the maximum conservation of energy and minimum necessity of reaching, lifting, bending, pulling, and climbing; and 3) safety factors (p. 35).

Recommendations for comfort in house design for the elderly have been made by various researchers. These recommendations include: 1) space in the bathroom should allow for turning radius for a wheelchair (Dee Casto and Day, 1977); 2) cabinets and mirrors in the bath and bedrooms should be lowered to approximately three feet from the floor (May, Waggoner, and Halle, 1974); 3) the kitchen must have continuous counter tops to permit the sliding of utensils and to minimize lifting (May, Waggoner, and Halle, 1974); 4) cabinets for storage should be shallow (about one foot deep), open and have revolving, pull-out shelves, vertical storage,

and pegboards (May, Waggoner and Halle, 1974); 5) walls should be both smooth and easy to clean. Unnecessary projections and odd angles should be avoided (Tucker, 1975); 6) the lower level for the windows should be between two and three feet from the floor (McGuire, 1975); 7) enough windows should be provided for the entrance of natural light and for the visual expansion of the environment (McGuire, 1975); 8) illumination level must be high (Dee Casto and Day, 1977); 9) it is recommended that three-way switches be located at the room entrance (Lawton, 1975); 10) outlets should be three feet up from the floor (Lawton, 1975); and 11) the doors should be at least three feet wide (Dee Casto and Day, 1977).

Circulation Space

Space for free circulation around the house lets the elderly perform their tasks and hobbies with more independence. Enough circulation space should be provided in order to satisfy their needs.

Health has a very important bearing on living arrangements. As Leeds (1973) stated, some of the limitations the elderly may have are limitations of movement, inability to climb stairs at a certain point, loss of visual and acoustical acuity, and forgetfulness.

According to Green (1975), some of the recommendations that affect the house space for circulation were as follows: 1) doorways and traffic areas should be at least three feet

wide and uncluttered; 2) for persons with limited mobility, single-story or ground-floor residences are most desirable; and 3) the pathway from the bed to the bathroom should be well-illuminated.

Safety

To be good, housing must squarely face the question of security. Shelter carries the connotation of safety. Carp (1976, p. 22) stated that "the home area should be one in which the individual, at any age, can carry out normal activities without fear of accident."

Basic safety features to be included are almost taken for granted. Such features help prevent accidents among people with physical limitations associated with aging. The list is nearly endless, and basically includes features that contribute to safety and freedom from accidents in homes for the non-elderly as well.

Lawton (1975, p. 123) suggested a number of safety features that should be considered in the designing of housing for the elderly. They were as follows: 1) non-skid tub and shower surfaces; 2) controlled water temperature in tub or shower; 3) flush door entrances; 4) safety shutoffs for gas burners; 5) stove burner controls in front of burners rather than at the back of the stove, so that reaching over a hot burner is not required to adjust them; 6) protective screens or covers for hot water or steam radiators; 7) a wall light fixture in each room to avoid tempting the tenant

to stand high on a chair while changing a light bulb; 8) non-skid backing on any small rugs used in an apartment; 9) every table used in a public place constructed so that it cannot tip on occasions when a person puts all his weight on one side to help him get up; 10) doors that do not swing shut with sensitive reopening mechanisms; and 11) handrails for steps and for sloped walks, both indoors and outdoors.

The inclusion of such features in homes designed specifically for the elderly is far more important because of the potential for physical limitations. Yet it is relatively easy to justify the inclusion of many of the features in all housing units.

Green (1975) stated that special consideration should be given regarding location and site, architectural and special features, and the inclusion of a wide range of services and programs. According to McGuire (1957) it is also necessary to provide adult educational programs, productive employment, and so on. The consideration of all these factors can help the elderly prevent their premature institutionalization. The following section discusses factors related to site, communal facilities, and special structural features.

Site

The area where the project is located is very important for the elderly. (Green, 1975) identified the following key factors that should be considered regarding sites localized

in urban neighborhoods:

a) security - safety for pedestrians to use the area at all hours of the day; b) pollution - avoid the detrimental effect on the site of noise, air, and visual pollution; c) developability - site large enough for an acceptable residential site plan; d) economic stability - services at a convenient walking distance; e) precedent for residential living - site localized in an area where other younger families want to live; and f) availability of public transportation (p. 34).

Morris (1978) stated that because many elderly do not have automobiles, the dwelling should be within walking distance (one-fourth of a mile) of a grocery store, drug store, bus stop, place of worship, clinic or hospital, and bank. Access to other facilities such as restaurant, movies, and library is recommended by Lawton (1975).

Communal Facilities

Communal services in the housing project should be provided for the elderly in order to make their lives more meaningful and active. McGuire (1957) suggests that buildings for the occupancy for older persons should include:

- 1) recreation, craft, and useful pursuit facilities;
- 2) counseling services for family, legal and re-employment problems;
- 3) library services;
- 4) geriatric clinic for diagnosis, treatment and preventative health instruction; and
- 5) senior's center for recreational programs (p. 33).

When planning of communal activities for the residents in the project, it is necessary to consider the services available in the surrounding community. According to Green (1975)

The program for common facilities must respond to the diverse needs of different age groups within the

elderly population. It must also respond to the varied backgrounds, cultural habits, and traditions of the residents.

Structural Features

There are some structural features that must be considered in the design of the buildings for elderly residents. In addition to the required features for barrier-free and safety, some authors made the following recommendations:

1) Apartments should be oriented to the prevailing natural breeze. Cross ventilation is a necessity because of the particular susceptibility of the aged to changes in temperature (McGuire, 1957).

2) The designing of windows should be in such a way that they can be cleaned from the inside easily and without climbing (Green, 1975).

3) Safe balconies should be provided. If it is not possible to have a balcony for each apartment, a common balcony, accessible to all residents on the floor, should be provided (Green, 1975).

4) Loud noises must be controlled. High-noise areas in the building should be separated from quiet areas such as the apartments. Bedrooms should not be located near high-noise areas such as elevators, mechanical rooms, communal activity rooms, laundries, etc. (Green, 1975).

Housing Satisfaction of the Elderly

Because congregate housing is a relatively new housing alternative for the elderly, limited research had been done in relation to the satisfaction of the elderly with congregate housing. Studies indicate that elderly appreciate and benefit from improved housing situations available in congregate housing projects.

Over a period of eight years, Carp (1966, 1975, 1976, and 1977) studied the satisfactions related with housing of the residents of Victoria Plaza, a high-rise congregate housing for the elderly in San Antonio, Texas. The results of this study showed that the elderly were well satisfied with their housing. The good qualities of the physical environment were the primary determinant in their satisfaction. All the participants in this study were living in poor housing conditions in the community before they moved into the new congregate housing project.

The improved living conditions also benefit the health of the residents, as stated by Carp (1977). From her study, Carp (1977, p. 24) concluded, "Therefore provision of appropriate housing and living arrangements may not only improve psychological and social well-being during the later years, but may also extend those years and benefit health status during them."

Another study done recently with elderly living in congregate housing was by Lawton, Nahemow and Teaff in 1975.

The purpose of this study was to determine the relationship between sponsorship, community size, number of units, and height of the building with six indices of well-being of the elderly tenants. The indices of well-being were: friendship within the housing project, housing satisfaction, morale, motility, family contact, and activity participation.

The results of this study showed that housing satisfaction was greater in projects that were smaller in terms of total units, but was not related to size when size was defined in terms of elderly-designated units. Higher friendship scores, greater housing satisfaction, and greater activity participation was associated with non-profit sponsored housing.

Another study made by Lawton and Cohen (1974) showed that elderly tenants in congregate housing for the elderly reported more satisfaction and improvement on the current problems of the tenants. This study compared applicants who became tenants of the housing project with applicants who did not become tenants. The tenants of the housing project were more satisfied with their housing, with their amenities and services, had higher morale, better perceived health, and were more socially active.

Summary

The review of the literature shows that housing was one of the major problems confronted by the elderly. The principal reason for this is the low income situation of many

elderly. The median income of the elderly was lower than the median income of families with younger household heads. The withdrawal from the labor force, the compulsory retirement system and the inflationary situation of the recent years were the major factors affecting the low-income situation of the elderly. As a result of the low-income situation, many elderly were forced to spend a high percentage of income for housing even though many of them are living in substandard structures.

In general, the elderly preferred to maintain their own households and to live independently in the community. More than 60 percent of the elderly who live independently were located in metropolitan areas. Most of the inner city elderly residents owned their homes. However, renting apartments was the other main alternative. The renting of apartments offers some advantages to the low-income elderly such as: 1) apartments are less expensive to maintain than houses and 2) federal programs offer apartments with subsidized rent for low-income elderly.

The majority of the federally subsidized apartments for elderly were located in congregate housing projects for elderly. Many elderly persons in the United States and Puerto Rico moved to this type of housing during the last ten years. All persons of 62 years or more with a median income of no more than \$2,500 annually can apply to this housing in Puerto Rico.

The Department of Housing and Urban Development specifies the safety and design factors to be included in this type of housing. Some authors suggested essential physical and sociological conditions that must be provided in housing for the elderly. Requirements for elderly housing projects include factors that assure the comfort, circulation space and safety for the elderly resident. Also considerations about the site for the project, the communal facilities for the residents in the project, and some structural features such as orientation of the building for air circulation, window design, balconies, and control of noise should be made when designing housing projects for the elderly.

Because this is a relatively new housing alternative for the low-income elderly limited research has been done in the United States and virtually no research has been done in Puerto Rico with residents of this federally-assisted housing project for elderly. Research results showed that elderly residents are mostly satisfied with this type of housing. Some authors conclude that elderly appreciate and benefit from improved housing situations available in congregate housing projects.

CHAPTER III

METHODOLOGY

This chapter includes a discussion of the research design and the data collection procedure for the study. Included in this chapter are the description of the sampling procedure, development of the interview schedule, data collection procedure, definitions of the major variables and the data analysis procedures.

Selection of the Sample

The population for this study was identified as the elderly persons living in housing projects for the elderly in San Juan, Puerto Rico. These projects included only residents who were 65 years of age or older and who had low incomes, as defined by the social services agency as not in excess of \$2,500.00 for one person or \$2,900.00 for a couple (H.U.D., LMPD. 78-5, February 9, 1978). It was determined that residents of the housing projects would not be stratified by health status nor marital status prior to the selection of the sample.

A two-stage sampling procedure was used. From the total of 13 elderly housing projects in San Juan, two

projects were selected as representing major differences among the projects. The two projects selected were Altergarten Las Teresas and Comunidad del Retiro. These two projects differed in terms of the number of years they had been in operation, the physical design features of the structures, the size of the project, the type of project sponsor and the area in which they were located. A more detailed description of the two projects is included in Chapter IV.

The second stage of sampling was accomplished by drawing a random sample of residents from each project in proportion to the project size. Due to limitations of time and cost of data collection, the sample size was set at 100. Lists of all the apartments in each project were prepared and the household head in each residence was identified. Apartment numbers were randomly drawn for the sample. Since Altergarten Las Teresas has a total of 91 apartments while Comunidad del Retiro had 356 apartments, 20 members of the sample were selected from Altergarten Las Teresas and 80 members from Comunidad del Retiro.

Research Method

The survey research method was employed in this study. This method was appropriate because data had to be supplied by residents reporting their own experiences. The survey method has been used successfully in similar studies with

the elderly (Lawton and Cohen, 1974; Carp, 1976; Teaff, Lawton, Nahemow and Carlson, 1978).

Because of the age and educational level of the respondents, it was decided that personal interviews would be superior to mailed questionnaires for obtaining the data. As stated by Compton and Hall (1972), the interview offers many advantages over other methods. These advantages include 1) more flexibility in obtaining information; 2) personal contacts for encouraging cooperation, 3) greater control regarding the sequence of questions; 4) the possibility of adapting to the level of understanding of the interviewee; and 5) the possibility of obtaining more accurate information when respondents are poorly educated.

Development of the Instrument

In order to minimize interview time, a fixed alternative survey schedule was developed by the author. The schedule contained 80 questions which measured: 1) socioeconomic, demographic and health characteristics of the residents; 2) floor location of apartment, amount of rent and utilities and method of transportation most often used; 3) the degree of importance attached to 31 aspects of housing; and 4) the degree of satisfaction with the 33 aspects of housing as related to present living environment (see Appendix B, p. 104).

The survey schedule was originally written in English and was later translated to Spanish with the assistance of

professionals from the University of Puerto Rico and the Agricultural Extension Service in Puerto Rico. Effort was made to put the questions in simple language that could be easily understood by the elderly respondents who were expected to have minimal education.

The instrument was pre-tested with a group of ten low-income elderly persons living in a San Juan elderly housing project that was not included in the sample. Such pre-testing was recommended by Compton and Hall (1972) to determine clarity of the questions and evaluate whether or not the purpose of the research could be fulfilled by the instrument. The instrument was clarified and revised following the pre-test.

Data Collection

The household head of each apartment that was drawn into the sample was first contacted by letter explaining the purpose of the study and suggesting a time for an interview. The letter was sent five days prior to the suggested interview time (see Appendix A, p. 101).

The data were collected during a period of 12 days from August 6 to August 17, 1979. The respondents were interviewed in their apartments between 10:00 am and 7:00 pm. One respondent was out of the city and could not be reached for the interview so the final sample size was 99. None of the elderly persons contacted refused to be interviewed.

Interviews were conducted by the author and two volunteer interviewers. These interviewers were trained individually and instructed to be positive and friendly with the elderly. They were advised of the purpose of the study and cautioned about the importance of consistency in interviewing technique to avoid bias in the data. They were carefully instructed in how to explain the purpose of the study to the respondents.

The interview took about one hour to complete. Interview time was lengthy because some elderly were slow in responding because of health conditions or educational limitations and because respondents frequently wanted to discuss other, related or unrelated, topics.

Definitions of Major Variables

Housing Project

The independent variable had two categories. One project was Altergarten Las Teresas which was the smaller, but older project. The second was Comunidad del Retiro, the larger and newest project in San Juan (see more complete description in Chapter IV).

Characteristics of Respondents

The major characteristics of the respondents related to their socio-economic status, demographic characteristics and health status were measured by questions 1 through 16 in

the interview schedule (see Appendix A, p. 101). Categories of some of these variables were collapsed for the analysis because of the small sample size from Altergarten Las Teresas. The collapsed categories are shown in the tables related to that analysis in Chapter IV.

Importance of Aspects of Housing

Thirty-three items that could be important needs in housing for the elderly were identified through a search of the literature. Each item on the list was presented one at a time to each respondent. The respondent was asked to rank each item from "1 = not at all important" to "5 = very important" (see questions 17 through 47 in Appendix B, p. 104).

Satisfaction with Aspects of Housing

A list of 33 items were presented to each respondent. The respondent was asked to evaluate each aspect as related to present housing and rate his or her satisfaction with the aspect as "1 = very dissatisfied" to "5 = very satisfied" (see questions 48 through 80 in Appendix B, p. 104).

Analysis of the Data

The design of the instrument permitted all the data to be numerically coded to facilitate analysis through the computer. Simple frequency tables were obtained for all variables as the first step. Next, two-way contingency

tables with chi-square tests were performed to analyze differences between the two projects in terms of socioeconomic characteristics of the respondents, importance of selected aspects of housing and satisfaction with selected aspects of housing.

The chi-square test is a non-parametric test used to test the null hypothesis that no significant differences exist between categories of a variable, i.e. the two housing projects. The chi-square formula used was:

$$X^2 = \sum_{i=1}^k \frac{(O_i - E_i)^2}{E_i}$$

where: O = the observed frequency for a cell and E = the expected frequency for a cell (Freeman, 1965, p. 222). The .05 level of confidence was used as the criterion for significance.

CHAPTER IV

FINDINGS

An analysis of the data collected in Puerto Rico from the sample of residents of Altergarten Las Teresas and Comunidad del Retiro is presented in this chapter. The first section discusses the characteristics of the projects and the socio-demographic characteristics of the respondents. The second section presents the analysis of differences between projects related to project characteristics and to socioeconomic characteristics of the respondents. The third section examines differences related to the degree of importance attached to various aspects of housing and the fourth section analyzes differences in levels of satisfaction.

Description of the Projects

Two projects were chosen because they had different characteristics which the researcher felt might influence the satisfaction of the residents. Before interviewing residents, it was possible to determine that the two projects were different in ownership, date of construction, height, apartment type, and location.

Both projects were located in the metropolitan area of San Juan, Puerto Rico and were funded by HUD. The projects were located close to each other, at only five minutes by car. Reinforced concrete was the construction material used in both projects. The windows of the apartments in both projects were jalousie-type made of aluminum.

Altergarten Las Teresas

Altergarten Las Teresas is privately-sponsored by the Catholic Church. This is one of the oldest congregate housing projects for the elderly in Puerto Rico. It was opened in October, 1967. It is an eight-story building (see Figure 1) with seven floors of apartments and one floor, the first floor, with communal facilities. The project has a total of 91 units. Each floor has 13 apartments, 12 of which are efficiency (see Figure 2) and one is one-bedroom (see Figure 3). All the apartments (see Figure 4) have a kitchenette, a spacious bathroom, and a balcony.

In the communal facilities are located a large living/meeting room with large glass windows, rest rooms, the administrative office, reception desk, a small chapel, laundry, and a terrace. On one side of the building is a yard with trees and benches. At the front of the building there is a parking area.

The neighborhood (see Figure 5) of this project is a residential area in which houses are single-family residences. Public transportation is available very close to the



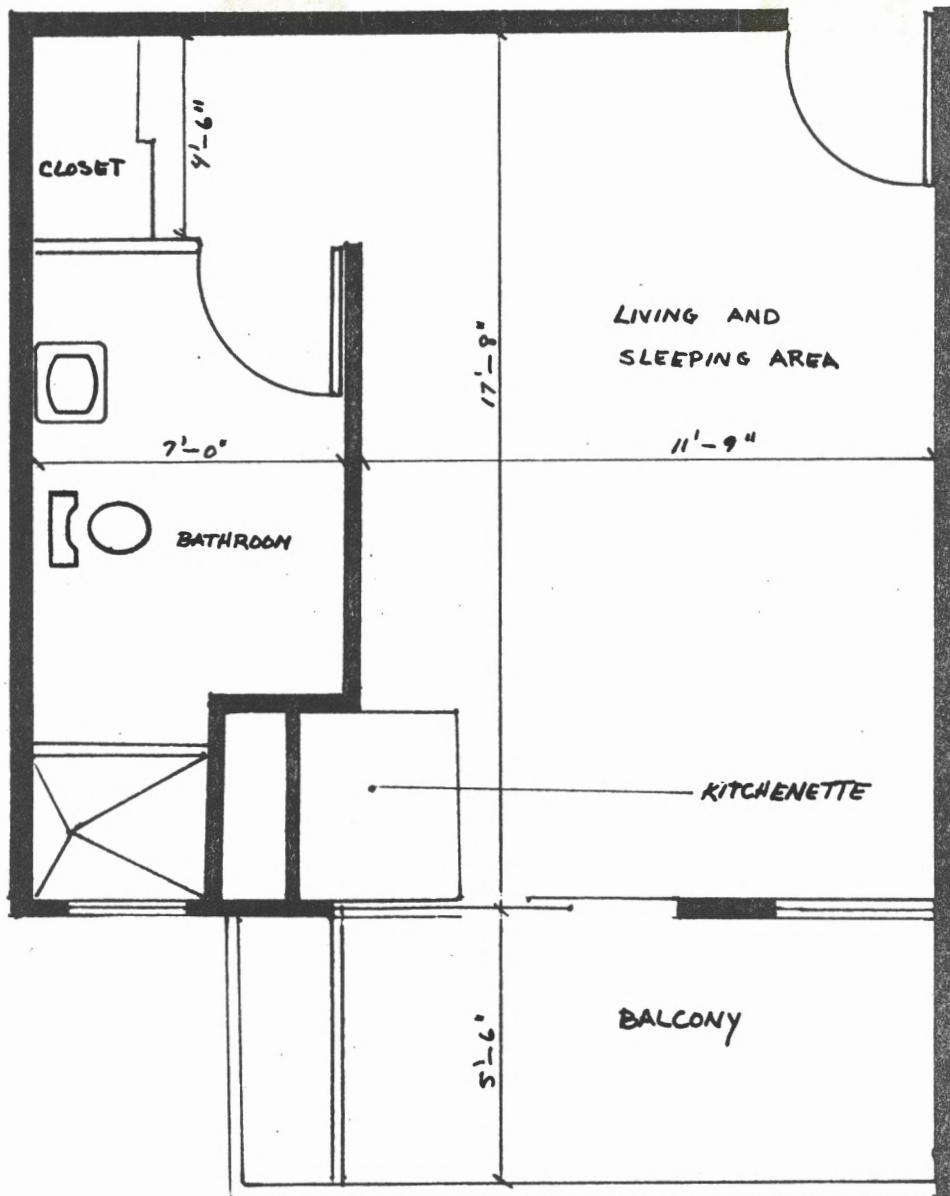
a) Front view of Building

Figure 1. Altergarten Las Teresas.



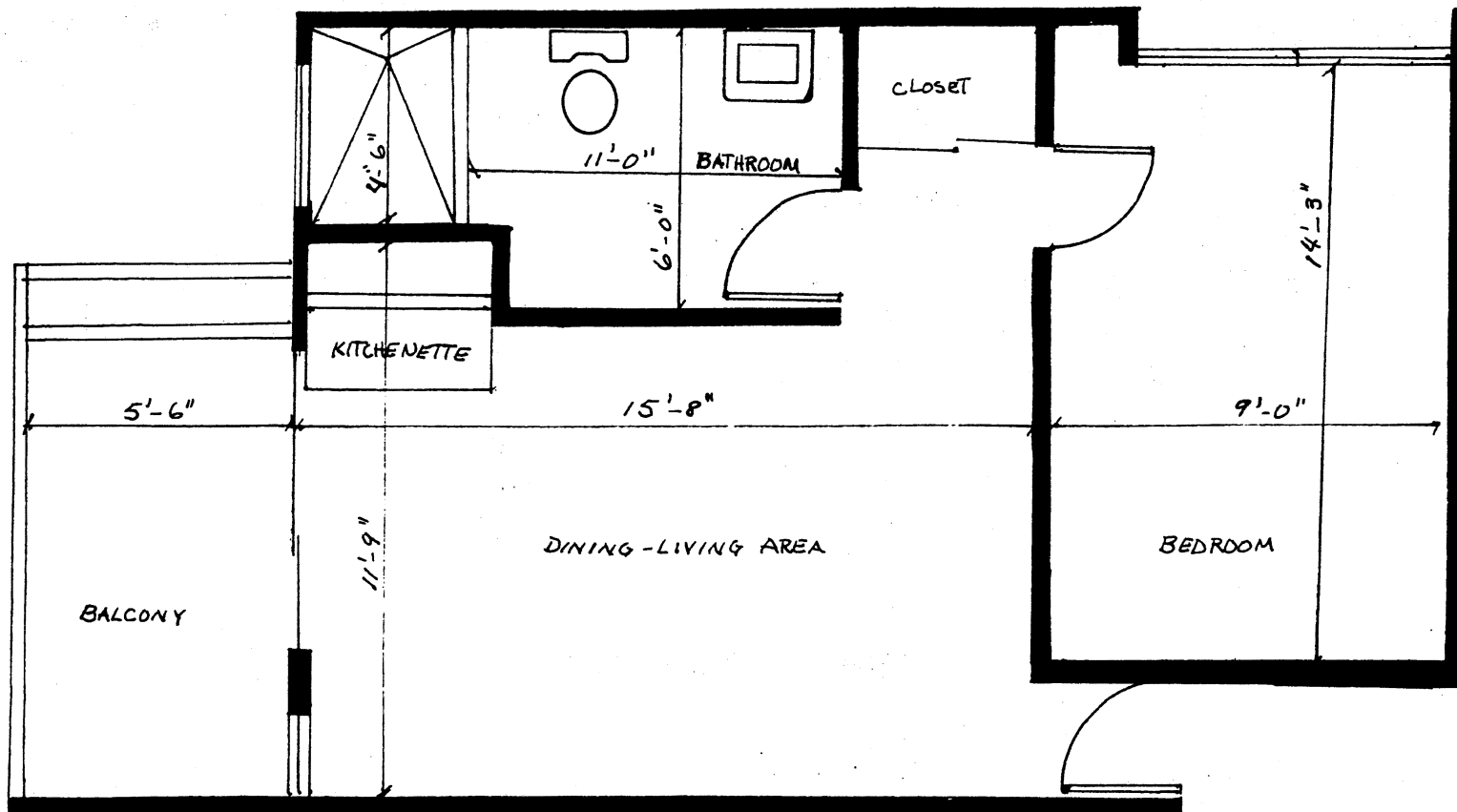
b) View of the Yard

Figure 1. (Continued).



Scale: $\frac{1}{4}'' = 1'$

Figure 2. Altergarten Las Teresas - Floor Plan of Efficiency Apartment.



Scale: $\frac{1}{4}" = 1'$

Figure 3. Altergarten Las Teresas - Floor Plan of One-Bedroom Apartment.

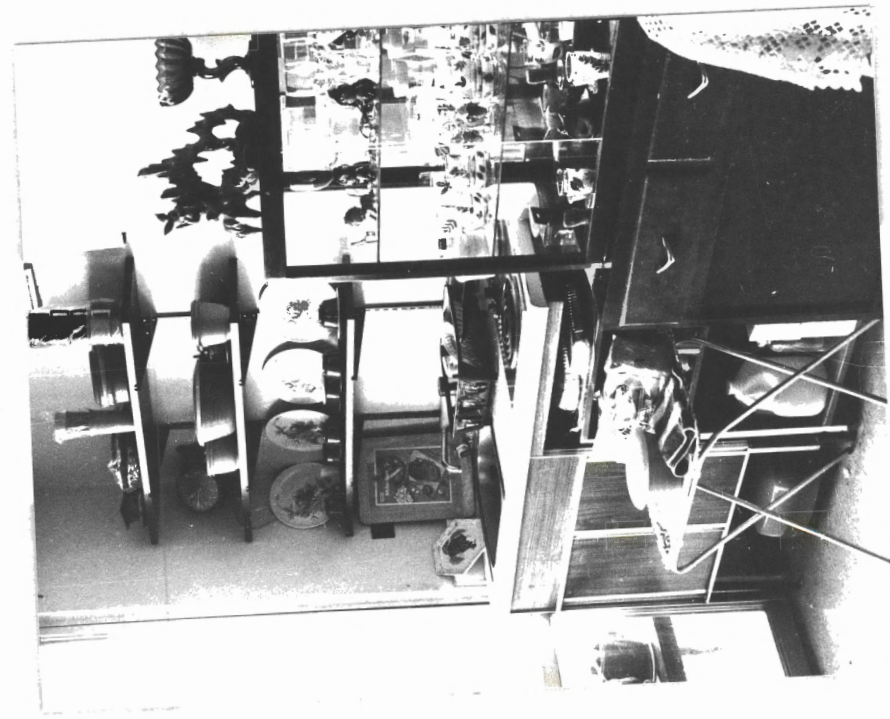


a) Living Area

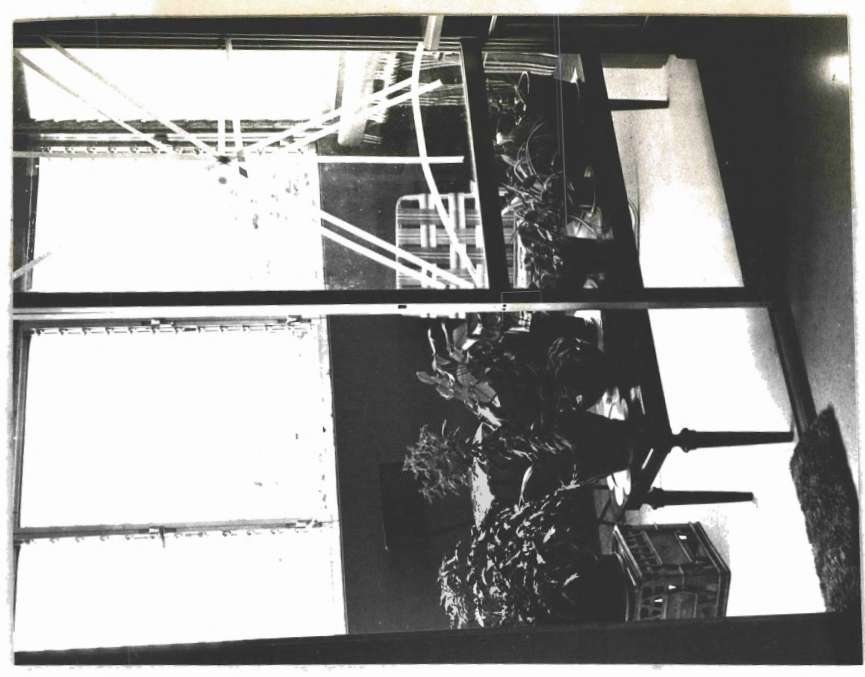


b) Sleeping Area

Figure 4. Altergarten Las Teresas - Inside View of Apartment.



c) Kitchenette



d) Balcony

Figure 4. (Continued)



e) Bathroom

Figure 4. (Continued).

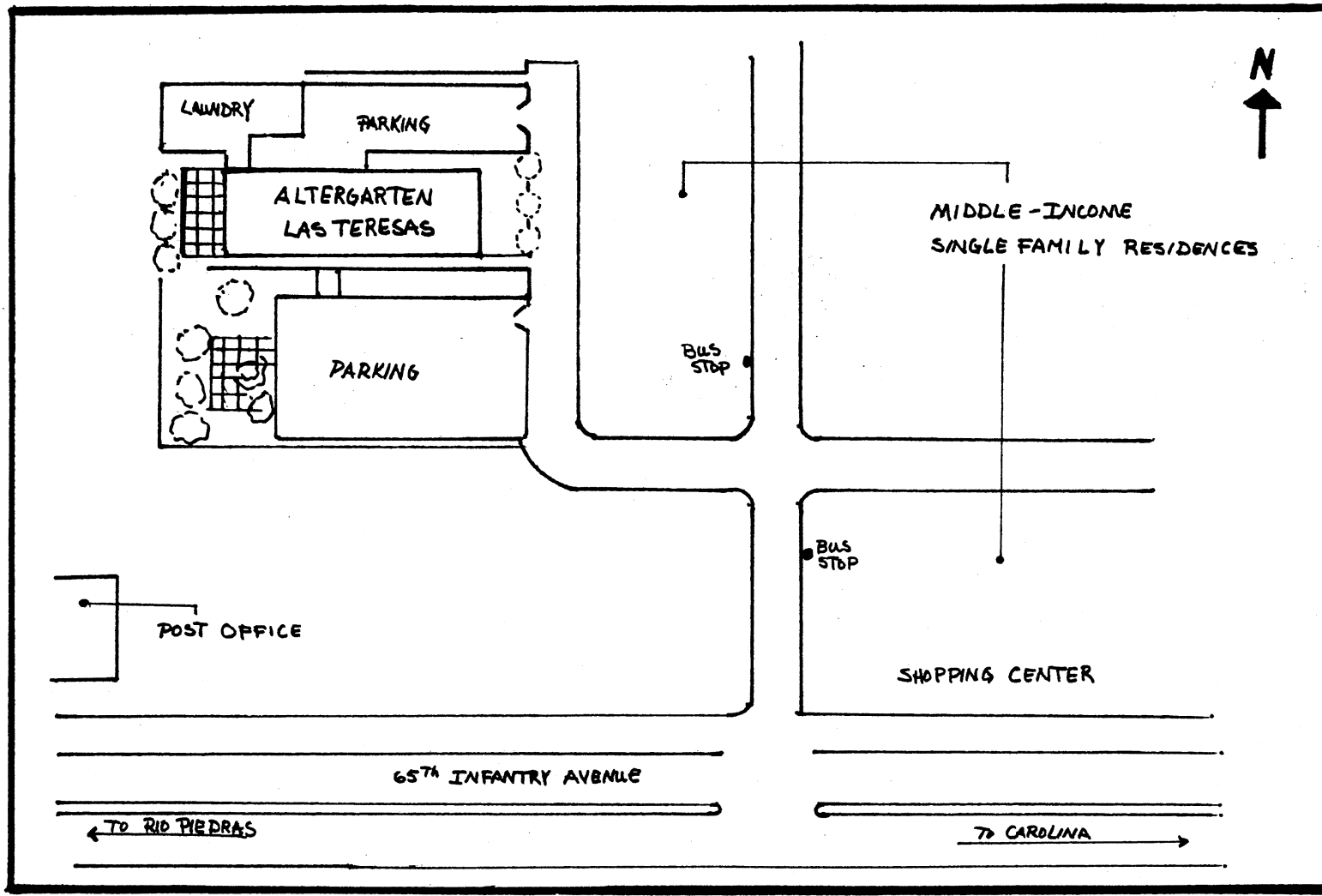


Figure 5. Neighborhood of Altergarten Las Teresas.

project. Facilities such as shopping, post office and some medical services are within walking distance from the project.

Comunidad del Retiro

Comunidad del Retiro is publicly-sponsored by the municipal government of the city of San Juan. It is one of the newest projects on the island and was opened in May, 1978. With 356 units, it is one of the largest congregate housing facilities on the island. The project is comprised of two adjacent, fifteen-story buildings which are connected by a sheltered corridor and communal facilities (see Figure 6).

All the apartments in this project are of one-bedroom type (see Figures 7 and 8). The apartments in the 14 upper stories of each building are for the elderly and ones on the first floor are for the handicapped.

The communal facilities in the project include a lobby area, administrative office, social services office, postal service boxes, a room available for possible medical examinations, a multi-purpose room, and space for a future grocery store. A laundry room is located on every other floor in each one of the buildings.

The grass-covered, open space around the buildings is furnished with some benches, but no outdoor, sheltered area is provided. Parking areas are available at the sides of the buildings, but there is a large, undeveloped area behind the project. This area is covered with undergrowth.

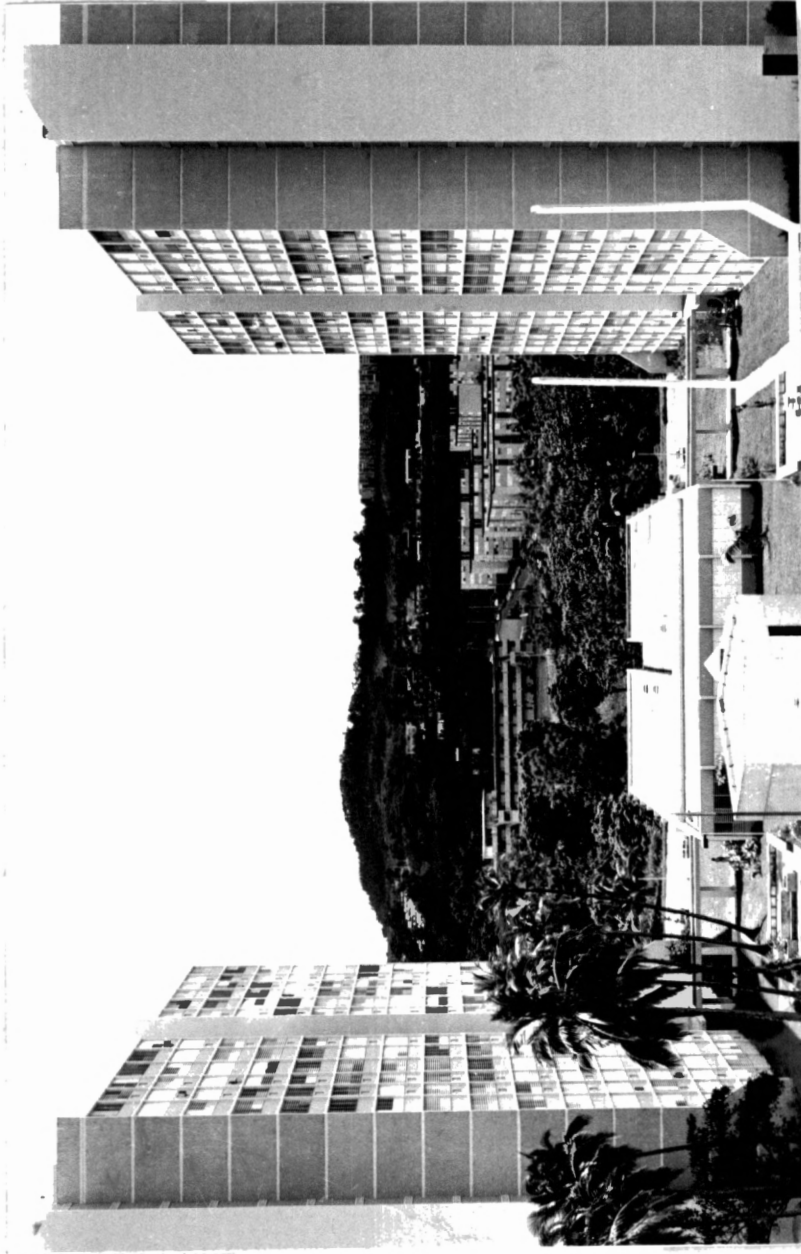
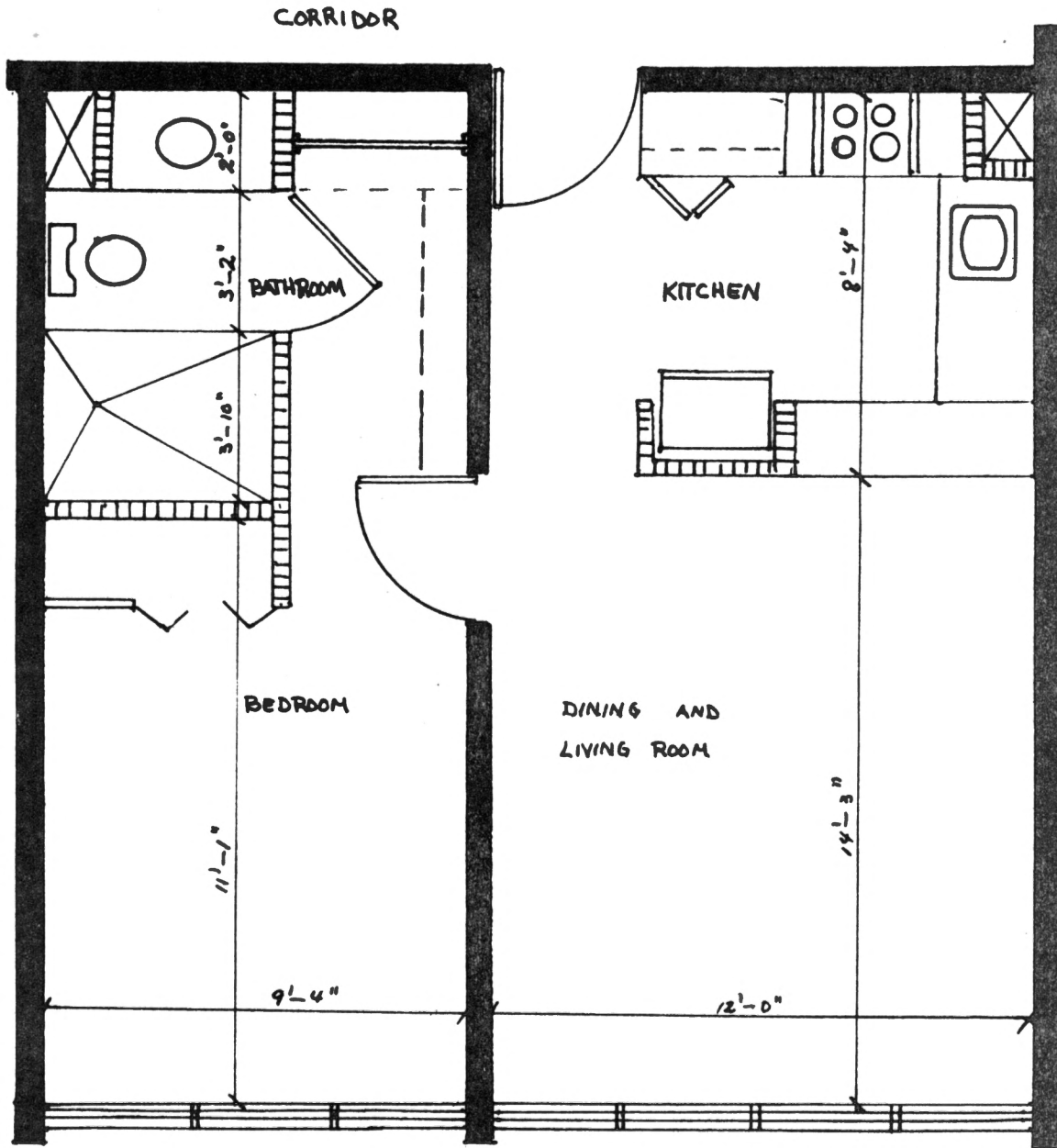


Figure 6. Comunidad del Retiro - View of the Project.



Scale: $\frac{1}{4}'' = 1'$

Figure 7. Comunidad del Retiro - One-bedroom Apartment.



a) Living Room



b) Bedroom

Figure 8. Comunidad del Retiro - Inside View of Apartment.



c) Kitchen



d) Bathroom

Figure 8. (Continued).

Las Antillas Clinic is located between the project and the highway. This clinic gives nursing care to its own residents, but does not provide medical service to the residents of Comunidad del Retiro. The closest medical service for the residents of Comunidad del Retiro is a public medical dispensary located on the other side of the highway.

The neighborhood (see Figure 9) surrounding Comunidad del Retiro is a mixture of commercial and residential uses with undeveloped land areas scattered through the area. The nearest residential area is a public housing development for low-income families. In this residential area is located a small shopping center that is the closest to the elderly housing project.

The nearest public transportation available to the residents of the project is on the highway. The elderly residents have to walk about ten minutes to the nearest bus stop. This situation offers a lot of inconveniences for the elderly especially when they are sick or on rainy days.

Offices for social services needed by the elderly residents and for the payment of utilities is not located within walking distance. The residents have to take a car or public transportation to all of these services.

Recreational and educational facilities adequate for the elderly are not close to the project. A public primary school is the only close educational facility and is located across the highway.

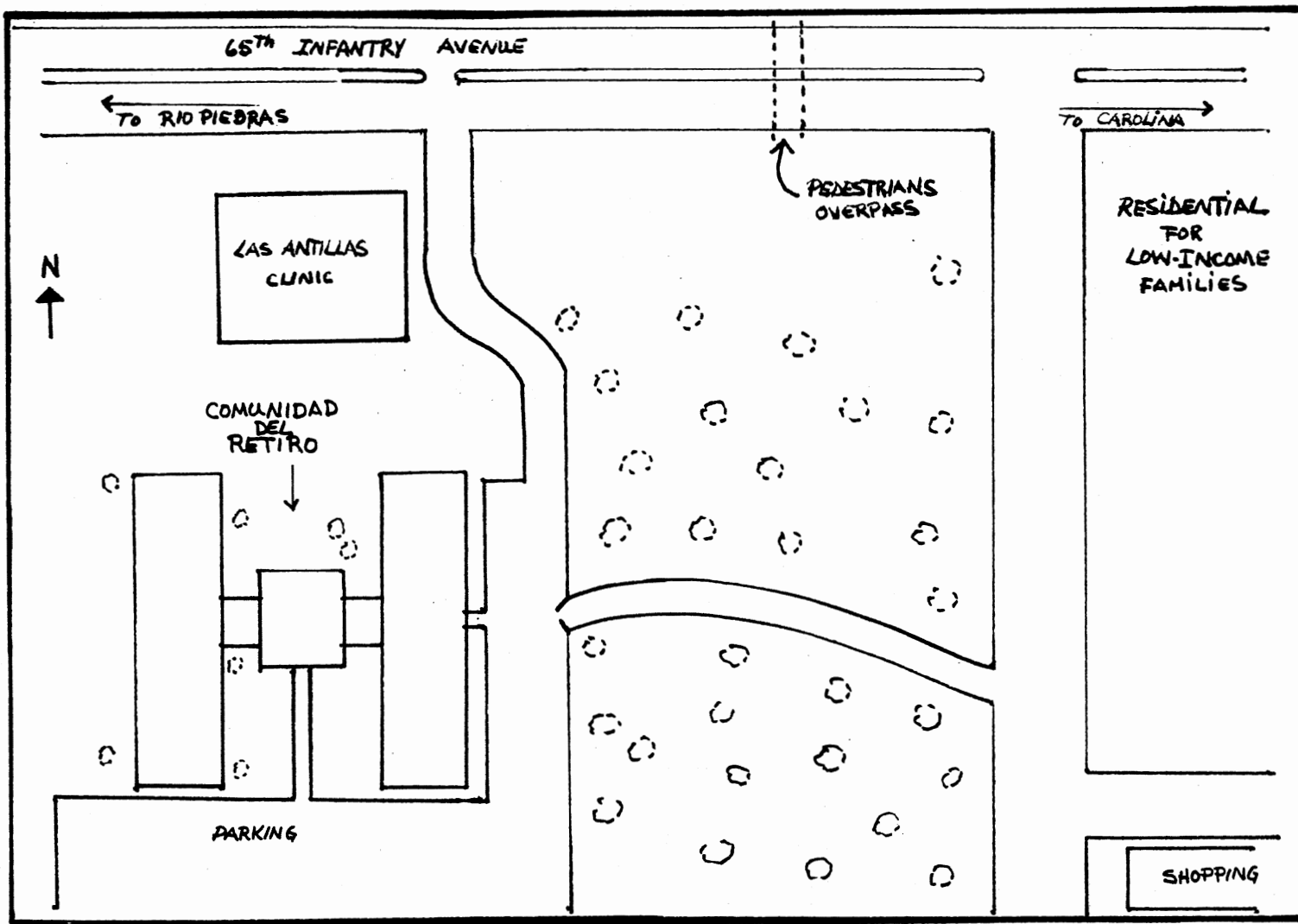


Figure 9. Comunidad del Retiro - Neighborhood.

Description of the Sample

A detailed description of the 99 respondents who participated in the study is presented in Table I. The sample consisted of 83 percent females and 17 percent males.

The ages of the respondents ranged from 65 to over 85 years with the largest percentage (46 percent) being 65 to 69 years old. Approximately half (49 percent) of the respondents were widows or widowers.

Regarding the living arrangement, over three-fourths of the sample were living alone. This is related to the marital status. In Altergarten Las Teresas, 90 percent of the respondents lived alone. These individuals were divorced or widowed, or had never been married. None of the respondents could live with other relatives or non-relatives because of administrative regulations in both projects which prohibit the sharing of apartments with persons other than the spouse.

The health status, as reported by respondents, ranged from "poor" to "excellent". Approximately two-thirds of the respondents reported their health status as "fair" or "good". The largest percentage (45 percent) of the respondents from Altergarten Las Teresas reported having "good" health while the largest percentage (38 percent) of the residents from Comunidad del Retiro reported only "fair" health status. Two-thirds of the sample reported needing no help with daily activities because of health problems.

TABLE I
CHARACTERISTICS OF THE RESPONDENTS
AND THEIR HOUSING

	A Las Terasas (n=20)		Comunidad Del Retiro (n=79)		Total	
	n	%	n	%	n	%
Sex						
Female	19	95	63	80	82	83
Male	1	5	16	20	17	17
Age						
65 to 69	4	20	41	52	45	46
70 to 74	5	25	22	28	27	27
75 to 79	6	30	5	6	11	11
80 to 84	4	20	9	11	13	13
Over to 85	1	5	2	3	3	3
Civil Status						
Never Married	5	25	10	13	15	15
Married	2	10	19	23	21	21
Divorced	2	10	10	13	12	12
Widowed	11	55	38	48	49	50
Separated	0	0	2	3	2	2
Living Arrangement						
Alone	18	90	60	77	78	79
With Spouse	2	10	19	23	21	21
Health Status						
Excellent	1	5	11	14	12	12
Good	9	45	22	28	31	31
Fair	7	35	30	38	37	38
Poor	3	15	16	20	19	19
Health Influence						
Need no help	19	95	46	59	65	66
Need some help	1	5	15	19	16	16
Need a lot of help	0	0	13	16	13	13
Cannot do anything	0	0	5	6	5	5

TABLE I (Continued)

	A Las Terasas		Comunidad Del Retiro		Total	
	n	%	n	%	n	%
Educational Level						
Do not know how to read or write	0	0	3	4	3	3
Primary School	7	35	28	35	35	36
Secondary School	8	40	26	33	34	34
High School	3	15	15	19	18	18
College	2	10	7	9	9	10
Primary Income						
Employment	0	0	1	1	1	1
Social Security	17	85	57	72	74	74
Retirement System	1	5	6	8	7	7
Public Assistance	0	0	11	14	11	11
Donations from Relatives	2	10	4	5	6	7
Additional Income						
None	13	65	47	59	60	60
Employment	0	0	3	4	3	3
Social Security	0	0	7	9	7	7
Retirement System	1	5	1	1	2	2
Public Assistance	2	10	19	24	21	21
Donations from Relatives	4	20	2	3	6	7
Rent						
Nothing	0	0	7	9	7	8
From 1 to 25 Dollars	3	15	31	39	34	34
From 26 to 50 Dollars	13	65	27	34	40	40
From 51 to 100 Dollars	2	10	14	18	16	16
Over 101 Dollars	2	10	0	0	2	2
Utilities						
Nothing	19	95	0	0	19	19
From 1 to 5 Dollars	0	0	43	53	43	44
From 6 to 10 Dollars	1	5	36	46	37	37
Way of Transportation						
Personal car	2	10	7	9	9	10
Ride	7	35	6	8	13	13
Bus	10	50	64	81	74	74
Walk	1	5	0	0	2	2
Other	0	0	2	2	1	1

TABLE I (Continued)

	A. Las Terasas		Comunidad Del Retiro		Total	
	n	%	n	%	n	%
Floor Location of Apartment						
1 to 5	17	85	21	27	38	38
6 to 10	3	15	24	30	27	27
11 to 15	0	0	34	43	34	35
Apartment type						
Efficiency	15	75	0	0	15	15
1-Bedroom	5	25	79	100	85	85
Length of Residence						
Less than a year	5	25	11	13	16	16
1 to 3 years	2	10	68	87	70	70
Over 3 to 6 years	4	20	0	0	4	4
Over 6 to 9 years	1	5	0	0	1	1
Over 9 years	8	40	0	0	8	9

Regarding the educational level of the respondents, the largest percentage (70 percent) of the respondents had attended primary or secondary school. Over one-fourth of the sample had at least completed high school and ten percent had some college education. The education level of the sample was higher than as expected, given that in 1976 71.6 percent of the elderly in Puerto Rico were analphabets (Puerto Rico Woman Commission, 1978, p. 19).

Social security was the primary source of income for three-fourths of the respondents. This was the case for the respondents in both projects. However, public assistance was the next source of income for respondents in Comunidad del Retiro while no respondents in Altergarten Las Teresas reported welfare as a primary source of income.

The largest proportion of all of the respondents (60 percent) did not have income in addition to their primary source. Public assistance was the most frequently-mentioned source of additional income for the residents of Comunidad del Retiro, but donation from relatives was most frequently the second income source for residents of Altergarten Las Teresas.

Test of the Hypotheses

Differences in Characteristics of the Two Projects

Observable differences in the two projects were discussed at the beginning of this chapter. The research also

asked the respondents about other project characteristics that were not observable before interviews were conducted. These characteristics included amount of rent paid, amount of utilities paid, and the method of transportation most often used by the respondents, and the length of residence. The chi square test was used to measure significant differences between the projects. The following null hypothesis was tested:

H_{01} : There will be no significant differences between the projects Altergarten Las Teresas and Comunidad del Retiro in terms of amount of rent paid, amount of utilities paid, and the method of transportation most often used. Chi square test revealed significant differences between projects on all three of these variables (see Table II).

TABLE II
CHI SQUARE SIGNIFICANCE LEVELS FOR DIFFERENCES IN PROJECTS CHARACTERISTICS
IN ALTERGARTEN LAS TERESAS AND
COMUNIDAD DEL RETIRO

Project Characteristic	Chi Square	Level of Significance
Rent	16.74	.01
Utilities	11.29	.01
Transportation	15.66	.01

The amount of rent paid was significantly different between the two projects ($P < .01$). All the respondents from Altergarten Las Teresas paid rent while 9 percent from Comunidad del Retiro did not pay any rent because they were on total subsidy. A larger percentage of the respondents in Altergarten Las Teresas paid higher rents (see Table I, p. 52). Eighty-five percent of the residents in Altergarten Las Teresas were paying \$26.00 or more per month while only 52 percent of the residents of Comunidad del Retiro were paying that amount.

In relation to utilities paid, there was a significant difference ($P < .01$) between the two projects. The residents from Altergarten Las Teresas did not have to pay utilities unless they had air conditioners. Therefore, only one of the respondents from that project paid a utility charge. All the respondents from Comunidad del Retiro had to pay utilities and the distribution was almost equally divided between the two utility cost categories (see Table I).

The mode of transportation differed significantly between the two projects ($P < .01$). The most frequently-used mode of transportation for the respondents from Comunidad del Retiro was bus (81 percent), while only 50 percent of the respondents from Altergarten Las Teresas used the bus and 35 percent rode with relatives or friends.

The length of time a resident could have lived in the two projects was different. Comunidad del Retiro was a new project so all the respondents had lived there 15 months or

less. Altergarten Las Teresas was an older project so more residents had lived there for more than three years.

The null hypothesis, H_{0_1} was rejected because the projects were found to differ significantly for all three variables tested. This result supports the statement that the two projects were significantly different along a number of dimensions.

Differences in Sociodemographic Characteristics of Residents

The differences between the projects in terms of the characteristics of the respondents were examined using chi square. The acceptable alpha level for significance was $P < .05$. The following null hypothesis was tested:

H_{0_2} There will be no significant differences in the sociodemographic characteristics of the residents in Altergarten Las Teresas and Comunidad del Retiro.

The nine characteristics of the respondents (sex, age, marital status, living arrangement, health status, health influence, educational level, primary income, and secondary income) were analyzed for differences between the projects. Only one characteristic, age, differed significantly between the two projects (Table III). The respondents from Comunidad del Retiro were younger, while 78 percent of the residents of Comunidad del Retiro were between 65 to 74 years old (see Table I, p. 52), only 45 percent of the residents of Altergarten Las Teresas were in that age group. Some age

difference was expected since Altergarten Las Teresas had been open for 12 years and residents had had the opportunity to live there for a longer period of time. Residents moving into the new Comunidad del Retiro project were more likely to be of the younger age groups, 65 to 69 or 70 to 74 years of age.

TABLE III

CHI SQUARE SIGNIFICANCE LEVELS FOR
DIFFERENCES IN AGE BETWEEN THE
RESPONDENTS OF ALTERGARTEN
LAS TERESAS AND COMUNI-
DAD DEL RETIRO

Personal Characteristics	Chi Square	Level of Significance
Age	12.89	.05

The null hypothesis H_0 was rejected only for age. This shows that the sociodemographic characteristics were basically similar between the respondents on both projects.

Aspects of Housing

Another objective of this study was to identify the aspects of housing which were of highest importance to older residents, and the aspects of housing with which the

older residents were most satisfied. Table IV includes all the aspects of housing that respondents were asked to rate by importance. The aspects of housing that were considered as "very important" are arranged in Table IV according to the percentage of all respondents who rated the aspect as "very important".

Health and Safety. Nearness to medical services was rates as "very important" by 100 percent of the respondents. However, only 34 percent of the respondents were satisfied with the distances to medical services. The respondents from Comunidad del Retiro were less satisfied (29 percent) than the respondents from Altergarten Las Teresas (50 percent).

Other aspects related to health and safety were considered as "very important" by over 80 of the respondents. The percent of respondents who were satisfied with many of these aspects were low. More residents in Altergarten Las Teresas were satisfied with the safety of pedestrians in the neighborhood and with the slip resistant floor than residents in Comunidad del Retiro. Respondents from Comunidad del Retiro were more satisfied regarding the grab bars in the bathroom than the respondents in Altergarten Las Teresas. The apartments in Comunidad del Retiro had more grab bars in the bathroom than the apartments in Altergarten Las Teresas.

Transportation and Nearness to Places they Need to Go. Over 47 percent of the respondents considered "very important" the public transportation and the nearness to services

TABLE IV

ASPECTS OF HOUSING CONSIDERED TO BE "VERY IMPORTANT"
AS COMPARED TO PRESENT SATISFACTION WITH
THESE ASPECTS OF HOUSING

Housing Aspect	A. Las Teresas (n = 20)				Comunidad del Retiro (n = 79)				Total (n = 99)			
	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking
Near Medical Services	100	1	50	8	100	1	29	22	100	1	34	24
Neighborhood Safe for Pedestrians	100	1	45	9	91	4	39	19	92	2	40	21
Public Transportation	80	5	60	9	96	2	20	23	92	2	29	25
Near Shopping Area	90	3	100	1	92	3	20	23	91	3	37	23
Slip Resistant Floor	100	1	100	1	82	9	52	17	86	4	62	18
Most Social Services at A Convenient Walking Distance	80	5	45	9	87	5	20	23	86	4	26	27
Grab Bars in the Bathroom	90	3	55	7	83	8	91	2	85	5	84	6
Free From Outside Noises	95	2	100	1	82	9	71	10	84	6	77	10

TABLE IV (Continued)

Housing Aspect	A. Las Teresas (n = 20)				Comunidad del Retiro (n = 79)				Total (n = 99)			
	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking
Office in the Project for the Payment of Rent and Utilities	80	5	95	2	84	7	34	21	83	7	47	20
Adequate Circulation of Fresh Air	75	6	90	3	86	6	82	8	83	7	83	7
To be in a Quiet Area of the City	85	4	--	-	79	10	--	--	80	8	--	--
Opportunity to be visited	80	5	70	7	74	11	71	10	75	9	71	13
Near Church	75	6	95	2	74	11	64	15	74	10	70	14
Location of Light Switch Near the Bed	75	6	80	5	72	12	61	16	72	11	65	16
Balcony	95	2	95	2	67	14	9	25	72	11	27	26
Easy to Clean Apartment	80	5	95	2	68	13	85	6	70	12	87	5
Convenient Height of Cabinets	75	6	65	8	67	14	46	18	68	13	50	19

TABLE IV (Continued)

Housing Aspect	A. Las Teresas (n = 20)				Comunidad del Retiro (n = 79)				Total (n = 99)			
	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking
Near Educational and Recreational Facilities	70	7	60	9	62	15	14	24	63	14	15	28
Adequate space in the Bathroom	60	9	90	3	60	16	91	2	60	15	90	3
Convenient Amount of Light at Work Areas	60	9	100	1	58	18	95	1	58	16	96	1
Plenty of Storage	55	10	70	7	59	17	87	5	58	16	73	12
Laundry Area	70	7	95	2	46	20	61	16	51	17	68	15
Activities with Other Residents	60	9	70	7	45	21	66	13	48	18	67	16
Adequate Space in the Kitchen	65	8	75	6	43	22	89	3	47	19	86	5
To be Near Relatives and Friends	65	8	70	7	43	22	70	11	47	20	70	14
Cafeteria	45	12	--	-	45	21	--	--	45	21	--	--

TABLE IV (Continued)

Housing Aspect	A. Las Teresas (n = 20)				Comunidad del Retiro (n = 79)				Total (n = 99)			
	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking
Gardening	35	14	--	-	48	19	--	--	45	22	--	--
Indoor Area for Arts and Crafts	40	13	--	-	46	20	--	--	45	23	--	--
Indoor Area for Meeting and Recreational Activities	50	11	85	4	43	22	71	10	44	24	74	11
Outdoor Area for Meetings and Recreation	50	11	75	6	37	23	35	20	40	25	39	22
To Be in Contact with Younger People	55	10	75	6	35	24	68	12	39	26	70	13
Apartment Color	--	--	100	1	--	--	83	7	--	--	94	2
Type of Windows	--	--	100	1	--	--	88	4	--	--	90	3
Floor Location of Apartment	--	--	100	1	--	--	65	14	--	--	80	9
Height of the Building	--	--	100	1	--	--	66	13	--	--	73	12

TABLE IV (Continued)

Housing Aspect	A. Las Teresas (n = 20)				Comunidad del Retiro (n = 79)				Total (n = 99)			
	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking	% Very Important	Ranking	% Satisfied	Ranking
Design of Building	--	--	90	3	--	--	70	11	--	--	74	11
Lobby	--	--	100	1	--	--	78	9	--	--	82	8

NOTE: Information for some housing aspects is not included because it was not collected in the data.

they need to go. Public transportation was considered as "very important" by 92 percent of the respondents, however only 40 percent of the respondents were satisfied with the public transportation available. A lower percentage (20 percent) of the respondents from Comunidad del Retiro were satisfied with available public transportation while in Altergarten Las Teresas, 60 percent were satisfied.

The services and facilities that were considered by the respondents as "very important" to be within or near the ground of the housing project were: shopping area (91 percent), social services (86 percent), office for the payment of rent and utilities (83 percent), church (74 percent), educational and recreational facilities (63 percent), and to be near relatives and friends (47 percent). This shows that elderly do not like to go far from their housing to find necessary services.

Regarding the percentage of respondents satisfied with these housing aspects, respondents from Altergarten Las Teresas were more satisfied with housing aspects related to distance than respondents from Comunidad del Retiro except for nearness to relatives and friends in which 70 percent of the respondents in both projects were satisfied. Ninety-five percent or more of the respondents from Altergarten Las Teresas were satisfied with the distance to shopping area, office for the payment of rent and utilities, and church. In comparison, 70 percent of the respondents from Comunidad del Retiro were satisfied with the distance to

church while only 27 percent were satisfied with the distance to shopping area and 28 percent with the distance to office for the payment of rent and utilities. The percentage of respondents in Comunidad del Retiro who were satisfied with distance to educational and recreational facilities was very low (15 percent). However, 60 percent of the respondents from Altergarten Las Teresas were satisfied with these housing aspects.

The differences in percentages of respondents satisfied with the housing aspects related to distance might be related to differences in site, neighborhood, and mode of transportation available to residents of the two projects. Also it is interesting to note the respondents' high interest in being near educational and recreational facilities. This may reflect a desire to continue to be active and to spend leisure time in a more creative way.

Apartment Design. Other aspects related to apartment design in the housing projects were considered as "very important" by 47 to 84 percent of the respondents from both projects. The percentage of respondents attaching "very important" to free from outside noises, adequate circulation of fresh air, location of light switch near bed, easy-to-clean apartment, convenient height of cabinets, adequate space in the bathroom, convenient amount of light at work areas, and plenty of storage were very similar in both projects. However, a somewhat higher percentage of residents of Altergarten Las Teresas considered most of these aspects

to be "very important". Circulation of fresh air and plenty of storage was considered as "very important" by a higher percentage of the residents in Comunidad del Retiro. Adequate space in the bathroom was considered as very important by 60 percent of all the respondents.

The percent of respondents satisfied with these aspects of housing was very similar for the two projects. More respondents from Altergarten Las Teresas were "satisfied" with freedom from outside noises (100 percent), circulation of fresh air (90 percent), location of light switch near bed (80 percent), convenient amount of light at work areas (100 percent) than respondents from Comunidad del Retiro. However, more respondents from Comunidad del Retiro were "satisfied" with adequate space in the bathroom (91 percent), adequate space in the kitchen (89 percent), and plenty of storage (87 percent) than respondents of Altergarten Las Teresas.

A large percentage (72 percent) of the respondents stated that a balcony was a "very important" housing aspect. However, a larger proportion (95 percent) of the respondents from Altergarten Las Teresas stated that a balcony was "very important" when compared with 67 percent of the respondents from Comunidad del Retiro.

Regarding the satisfaction attached to having a balcony more respondents (95 percent) from Altergarten Las Teresas were satisfied than respondents from Comunidad del Retiro where only nine percent were satisfied. This must have

cultural roots in that the typical houses in Puerto Rico have balconies and before living in a congregate housing project, the elderly probably lived in a house. Puerto Rican people like to have a balcony for recreation and for enjoyment of fresh air since Puerto Rico is a tropical country.

A laundry area was considered as "very important" by 50 percent of the respondents. However more respondents (70 percent) from Altergarten Las Teresas considered a laundry area as "very important" than respondents from Comunidad del Retiro with only 46 percent satisfied. Also respondents from Altergarten Las Teresas were more satisfied (95 percent) than Comunidad del Retiro (49 percent). This might be related to differences of laundry areas in the projects. In Altergarten Las Teresas, a community laundry area is located on the first floor while in Comunidad del Retiro, there are laundry facilities on every other floor. The opportunity for communication with all the residents in the laundry area in Altergarten Las Teresas and/or the absence of laundry facilities on every floor in Comunidad del Retiro might be the reasons for this result.

To be in a quiet area of the city was considered as "very important" by 80 percent of the respondents. More respondents (85 percent) from Altergarten Las Teresas considered this aspect of housing as "very important" than respondents from Comunidad del Retiro (79 percent).

Communal Facilities. The housing aspects related to communal facilities in the projects were considered as "very important" by 39 to 75 percent of the respondents. Opportunity to be visited was rated as "very important" by a larger number (75 percent) of the respondents, while to be in contact with younger people was considered as "very important" by only 39 percent of the respondents. To be in contact with younger people received the lowest rating regarding importance for all aspects of housing included in the interview schedule.

The other aspects of housing related to communal facilities were activities with other residents (48 percent), cafeteria (45 percent), gardening area (45 percent), indoor area for arts and crafts (45 percent), indoor area for meetings and recreation (40 percent).

The percentage of respondents "satisfied" with these aspects of housing ranged between 39 to 74 percent of respondents. Seventy-four percent of the respondents were satisfied with the indoor area for meetings and recreational activities while only 39 percent of the respondents were satisfied with outdoor area for meetings and recreation. More respondents from Altergarten Las Teresas were satisfied with these aspects of housing than respondents from Comunidad del Retiro.

The respondents' satisfaction with cafeteria, gardening and indoor area for arts and crafts was not requested in the instrument. The reason for this was that neither of the

projects provided these facilities at the time the data were collected.

For the last six aspects of housing included in Table IV, the researcher asked only information about degree of satisfaction of the residents in the two projects. The author considered that the level of importance was not applicable for these aspects of housing.

Seventy-three to 94 percent of the respondents stated they were satisfied with color of apartment (94 percent), type of windows (90 percent), lobby (82 percent), floor location of their apartment (80 percent), design of the building (74 percent) and height of the building (73 percent). Respondents from Altergarten Las Teresas were, in general more satisfied with these aspects of housing than the respondents from Comunidad del Retiro.

Differences in Importance of Selected Aspects of Housing

The second major objective of this study was to analyze the differences in importance of various housing aspects between the two projects. The following null hypothesis was tested:

H_0 : The degree of importance attached to selected aspects of housing will not differ significantly between residents of the two projects.

Thirty-one aspects of housing were analyzed in terms of the importance attached to each by respondents in the two

projects. A significant difference was found between projects in relation to the importance attached to only one of the housing aspects. Table V shows that nearly half of the residents of Comunidad del Retiro attached very high importance to having an area in the project where they could do gardening. However, only 30 percent of the residents of Altergarten Las Teresas stated that a gardening area was very important. The largest proportion of residents of Altergarten Las Teresas felt that gardening was of low importance.

TABLE V
DIFFERENCES BETWEEN THE TWO PROJECTS
BY IMPORTANCE OF HAVING
A GARDENING AREA

Importance of Having A Gardening Area	A. Las Teresas		Comunidad Del Retiro		Total	
	n	%	n	%	n	%
Very low - Low	8	40	10	13	18	18
Fair - High	6	30	31	39	37	37
Very High	6	30	38	48	44	45
$\chi^2 = 8.21$						
P .05						

However, neither of the housing projects provide an area where the residents can do gardening. Therefore, the higher interest for a gardening area by the respondents from Comunidad del Retiro could be that they had more recently left their homes where they were more likely to have had the opportunity to garden and they were still aware of having lost that opportunity.

The null hypothesis that residents of the two projects would not differ in the importance they attached to selected aspects of housing was rejected for only the one aspect related to an area for gardening. In general, the entire elderly sample from these two projects was in agreement about the aspects of housing which were important.

It was further hypothesized that the differences in importance attached to gardening might be related to age, since the age of the respondents was significantly different between projects. However, when tested by chi square, there was no significant difference between the age groups in the importance they attached to having an area where they could do gardening.

Differences in Satisfaction with Selected Aspects of Housing

The third objective of this study was to analyze differences in satisfaction with selected aspects of housing between the two projects. The following null hypothesis was tested:

H_{04} : The degree of satisfaction with selected aspects of housing will not differ significantly between the residents of Altergarten Las Teresas and Comunidad del Retiro.

Of the 33 housing aspects that were tested, eleven showed significant differences in degree of satisfaction between the respondents from Altergarten Las Teresas and Comunidad del Retiro (Table VI).

The satisfaction with the location of the office for payment of rent and utilities was significantly different between residents of the two projects. All the respondents (100 percent) from Altergarten Las Teresas were "satisfied" to "very satisfied" while only 35 percent of the respondents from Comunidad del Retiro were "satisfied" to "very satisfied". The highest percentage of the respondents (65 percent) from Comunidad del Retiro were "dissatisfied" to "neutral". This was related to the fact that all the respondents from Comunidad del Retiro had to go to an office outside the project to pay utilities while respondents from Altergarten Las Teresas made all their payments at the office within the project.

Satisfaction with the distance to shopping area differed significantly between the projects. All the respondents (100 percent) from Altergarten Las Teresas were "satisfied" to "very satisfied" with distance to shopping area. Only 22 percent of the respondents from Comunidad del Retiro were satisfied.

TABLE VI

CHI SQUARE ANALYSIS OF DIFFERENCE IN LEVEL
OF SATISFACTION WITH SELECTED HOUSING
ASPECTS OF ALTERGARTEN LAS TERESAS
AND COMUNIDAD DEL RETIRO

Housing Aspect	A Las Terasas		Comunidad Del Retiro		Total	
	n	%	n	%	n	%
Office for Payment of Rent and Utilities						
Dissatisfied/Neutral	0	0	51	65	51	52
Satisfied/Very satisfied	20	100	28	35	48	48
	$X^2 = 25.96$					
	$P < .01$					
Distance to Shopping Area						
Dissatisfied/Neutral	0	0	62	78	62	62
Satisfied/Very satisfied	20	100	17	22	37	38
	$X^2 = 40.98$					
	$P < .01$					
Distance to Church						
Dissatisfied/Neutral	1	5	28	35	29	30
Satisfied/Very satisfied	19	95	51	65	70	70
	$X^2 = 6.99$					
	$P < .01$					
Distance to Offices of Social Services						
Dissatisfied/Neutral	11	55	62	78	73	73
Satisfied/Very satisfied	9	45	17	22	26	27
	$X^2 = 4.62$					
	$P < .05$					

TABLE VI (Continued)

Housing Aspect	A Las Terasas		Comunidad Del Retiro		Total	
	n	%	n	%	n	%
Available Public Transportation						
Dissatisfied/Neutral	7	35	63	80	70	70
Satisfied/Very satisfied	13	65	16	20	29	30
	$X^2 = 12.09$					
	$P < .01$					
Amount of Storage						
Dissatisfied/Neutral	6	30	9	11	15	15
Satisfied	10	50	23	29	33	33
Very Satisfied	4	20	47	60	51	52
	$X^2 = 10.6$					
	$P < .01$					
Safety Measures in the Bathroom						
Dissatisfied/Neutral	9	45	5	6	14	14
Satisfied/Very satisfied	11	55	74	94	85	86
	$X^2 = 19.86$					
	$P < .01$					
Balcony						
Dissatisfied/Neutral	1	5	71	89	72	73
Satisfied/Very satisfied	19	95	8	11	27	27
	$X^2 = 58.69$					
	$P < .01$					
Lobby						
Dissatisfied/Neutral	0	0	17	22	17	17
Satisfied	9	45	50	63	59	60
Very Satisfied	11	55	12	15	23	23
	$X^2 = 18.99$					
	$P < .01$					

TABLE VI (Continued)

Housing Aspect	A Las Terasas		Comunidad Del Retiro		Total	
	n	%	n	%	n	%
Flooring Material						
Dissatisfied/Neutral	0	0	37	47	37	37
Satisfied	10	50	27	34	37	37
Very Satisfied	10	50	15	19	25	26
	$\chi^2 = 43.94$					
	$P < .01$					
Laundry Area						
Dissatisfied/Neutral	1	5	30	38	31	31
Satisfied	14	70	28	35	42	43
Very Satisfied	5	25	21	27	26	26
	$\chi^2 = 9.93$					
	$P < .01$					

Respondents from Altergarten Las Teresas were more satisfied with distance to church. Ninety-five percent of the respondents from Altergarten Las Teresas were satisfied while only 65 percent of the respondents from Comunidad del Retiro stated a similar response.

Regarding the satisfaction with the distance to offices of social services, the highest percent of the respondents from both projects stated to be "dissatisfied" to "neutral". However, there was a significant difference between projects. Twenty-two percent of the respondents from Comunidad del Retiro were "satisfied" or "very satisfied" with the distance to the social services office, but 45 percent of the residents of Altergarten Las Teresas reported being "satisfied" or "very satisfied". Altergarten Las Teresas only had 55 percent of the respondents in those categories.

In general, the respondents from Altergarten Las Teresas were shown to be more satisfied in relation to the distance of the places they needed to go. This may be due to the fact that this project is inside a residential area, and the public transportation is available closer than to Comunidad del Retiro which was not inside a residential area.

Regarding the available public transportation, 80 percent of the respondents from Comunidad del Retiro reported being "dissatisfied" to "neutral" while 65 percent of the respondents from Altergarten Las Teresas were "satisfied"

to "very satisfied". This might be related to differences in distance within the projects to the nearest bus stop.

The level of satisfaction in relation to the amount of storage was higher in Comunidad del Retiro. In this housing project, 89 percent of the respondents were "satisfied" to "very satisfied" while in Altergarten Las Teresas, only 70 percent indicated these levels of satisfaction.

Regarding safety measures in the bathroom, respondents from Comunidad del Retiro were found to be more satisfied than the respondents from Altergarten Las Teresas. Ninety-four percent of the residents from Comunidad del Retiro were "satisfied" to "very satisfied" while only 55 percent of the residents from Altergarten Las Teresas responded in that way. The higher satisfaction of the residents from Comunidad del Retiro might be that the bathrooms in this housing project had more grab bars in the shower and toilet area.

In relation to satisfaction with the presence or absence of a balcony, 95 percent of the respondents from Altergarten Las Teresas, where balconies were present, reported being "neutral" to "very satisfied." However, only 50 percent of the respondents from Comunidad del Retiro reported those levels of satisfaction. Fifty percent of the respondents from Comunidad del Retiro were "dissatisfied" to "slightly satisfied" that they did not have a balcony.

Regarding the lobby area in the projects, 55 percent of the respondents from Altergarten Las Teresas were "very satisfied" in contrast to only 15 percent of the respondents

from Comunidad del Retiro. None of the respondents from Altergarten Las Teresas were "dissatisfied" to "neutral," but 22 percent of the respondents from Comunidad del Retiro reported such dissatisfaction.

Significant differences were found related to the flooring material in the two projects. All the respondents from Altergarten Las Teresas stated that they were "satisfied" to "very satisfied" while in Comunidad del Retiro only 53 percent indicated such satisfaction. The dissatisfaction of residents in Comunidad del Retiro was related to the vinyl flooring used in their apartments. The apartments in Altergarten Las Teresas, on the other hand, had terrazo tiles.

Differences in satisfaction with laundry area were also found between the projects. Respondents from Altergarten Las Teresas were more satisfied than those from Comunidad del Retiro. Ninety-five percent of the respondents from Altergarten Las Teresas stated that they were "very satisfied" compared to 62 percent of the respondents from Comunidad del Retiro.

The hypothesis four was partially rejected because significant differences in satisfaction were found for 11 of the 33 selected housing aspects. Differences in characteristics between the projects such as design and location might be responsible for these differences in degree of satisfaction with the selected housing aspects.

Differences in Satisfaction with Signifi-
cant Housing Aspects by Age of the
Respondents

Since age of the respondents was found to be significantly different between the two projects, another hypothesis was developed to test whether or not the level of satisfaction with the eleven housing aspects discussed in the previous analysis might be related to age. The additional hypothesis was:

H_{05} : The degree of satisfaction with selected aspects of housing will not differ significantly in relation to the age of respondents.

The eleven housing aspects that differed significantly between respondents of Altergarten Las Teresas and Comunidad del Retiro (Table VII) were tested with chi square for differences between age groups. Satisfaction with only one housing aspect was found to differ significantly in relation to differences in age. This aspect was satisfaction with presence or absence of a balcony ($P < .05$).

Eighty-one percent of the respondents between 65 and 74 years old stated they were "dissatisfied" with presence or absence of balconies, while only 52 percent of the respondents from 75 years or over were "dissatisfied" (see Table VII).

The null hypothesis that there were no differences in degree of satisfaction with various housing aspects in

relation to age of the respondents was rejected only for balconies. The differences in satisfaction with presence or absence of balconies may be attributable to both age and project design. More of the younger age group was dissatisfied and the larger proportion of the younger group lived in Comunidad del Retiro which did not have balconies.

TABLE VII
CHI SQUARE SIGNIFICANCE LEVEL FOR
SATISFACTION WITH BALCONY
BY AGE

Housing Aspect	Age				Total	
	65-74 (n = 72)		75 and over (n = 27)		(n = 99)	
	n	%	n	%	n	%
Balcony						
Dissatisfied/Neutral	58	81	14	52	72	73
Satisfied/Very satisfied	14	19	13	48	27	27
	$\chi^2 = 6.34$					
	P < .05					

Summary

Two projects were selected because of their differences on observable characteristics. Amount of rent, utility cost

and mode of transportation were measured in the interview and were found to differ significantly between projects.

Age was the only sociodemographic characteristic that was found to differ significantly ($P < .01$) between the residents of Altergarten Las Teresas and Comunidad del Retiro. The majority (78 percent) of the respondents from Comunidad del Retiro were under 74 years of age.

Twenty-two of the selected aspects of housing (see Table IV, p. 61) were rated as "very important" by at least 50 percent of the respondents. To be near medical services was considered as "very important" by all the respondents. However, the percentages of the respondents that were satisfied with these 22 aspects of housing were, in many cases, low, especially for residents of Comunidad del Retiro.

The importance attached to having a gardening area was the only aspect for which there was a significant difference between the projects. Respondents from Comunidad del Retiro attached more importance to this aspect of housing.

Degree of satisfaction with amount of storage, safety measures in the bathroom, presence of a balcony, flooring material, lobby, laundry area, office for the payment of rent and utilities, available public transportation, distance to shopping area, distance to church, and distance to offices of social services differed significantly for respondents in the two projects. These differences may well be related to differences in project characteristics.

CHAPTER V

SUMMARY, CONCLUSIONS, AND RECOMMENDATIONS

This chapter contains a summary of the project and the conclusions regarding the importance of selected aspects of housing and feelings of satisfaction among residents of congregate housing projects for the elderly. Recommendations for follow-up studies are made along with implications for housing design for the elderly. Through informal observations made during the interviews with the elderly, the researcher has included a discussion section to highlight some of the concerns of the elderly about their housing.

Summary

The purpose of this study was to analyze the importance of selected aspects of housing and the satisfaction with housing for residents of two congregate housing projects in Puerto Rico which were designed for the elderly. The projects were selected because of basic differences in date of construction, size of project, type of sponsorship (public vs. private), height of buildings, apartment type and location. Hypotheses were developed regarding expected differences between projects in terms of sociodemographic

differences in residents, differences in importance attached to selected aspects of housing and differences in housing satisfaction.

Data were collected during the summer of 1979 by interviews with a random sample of 99 residents in the two projects. The sample reflected the relative project sizes. Chi square tests were used to examine differences between projects.

Age was the only sociodemographic characteristic of the respondents which differed significantly between the projects. The importance attached to selected aspects of housing was very similar for respondents in the two housing projects. Having a gardening area in the project was the only aspect of housing that differed significantly in importance between residents of the projects.

Satisfaction with several aspects of housing were found to differ significantly between projects. These aspects included satisfaction with amount of storage, safety measures, balconies, flooring material, lobby, laundry, transportation and distance to services including shopping, church, office for payment of rent/utilities and office for social services. In general, respondents from the smaller and older project were more satisfied than were the respondents from the larger and newer project.

Conclusions

The majority of the respondents in the two housing

projects lived alone. They were widowed, divorced, or in some cases, had never been married. In many cases, relatives and close friends of those living in these housing projects lived long distances away. The fact is that people need people and the elderly are no exception. They need to continue interacting with other people as well as to feel they are useful to the community.

Educational and recreational activities as well as part-time and voluntary jobs must be provided for them not only to meet their social needs, but also to provide them with a satisfying and meaningful experience. These experiences cannot come out of a situation of isolation, but require continued opportunities for interaction and sharing.

The elderly person who lives alone needs to be stimulated to maintain contacts with the outside world instead of being alone in their apartments watching T.V. or some other, passive, non-social activity. Much of this requires social planning, but some can be encouraged simply through a conscious effort from staff members at the housing projects. Other types of contact can be encouraged through the design of the buildings. For example, the balcony makes contact with the exterior of their apartments possible and it provides situations for the elderly to socialize. At the same time, it improves the circulation of fresh air in the apartment.

The maintenance of mental health is one of the major challenges in Puerto Rican society. The elderly are very vulnerable to suffering from mental health disturbances.

The housing environment can be a major factor in the maintenance of mental health among the elderly. This is particularly true for the elderly because they spend most of their time in their apartment or in public areas within and around the project.

Changes in physical features to eliminate barriers in order to make the housing more safe and comfortable are important, but are not the only needs of the elderly. Designers and planners of housing for elderly must be sensitive to how the elderly feel in their environment. Understanding how the environment stimulates and satisfies the elderly's emotional needs is also crucial if needs are to be fully met.

In general, the respondents from Altergarten Las Teresas and Comunidad del Retiro felt satisfied with the overall housing; but residents of the older, privately-owned and sponsored facility were more satisfied than the residents in Comunidad del Retiro, the publicly-sponsored and newest facility. The differences in level of satisfaction are at least partially explainable by difference in the design of the two projects (see Figures 1 to 9, Chapter IV).

The availability of a balcony was a major structural difference between the two projects which clearly affected differences in satisfaction. The newest structure for congregate housing for the elderly is designed without balconies in order to prevent accidents and to lower the construction costs. However, many elderly may prefer to live in a smaller space with less space for storage and fewer security

features than to live in an apartment without a balcony.

Differences in degree of satisfaction between respondents from Altergarten Las Teresas and Comunidad del Retiro were mostly related to distance from the places where they needed to go. This indicates that the elderly want to have most of the services within the neighborhood or inside the project area. Most of the elderly do not have cars and they do not like to use the available public transportation that is not very comfortable for the elderly. Elderly are more inclined to get sick and for any sick person, even younger, it is not easy or comfortable to have to take public transportation for travel in order to acquire social services.

In general, the residents in the privately-sponsored housing project for the elderly reported higher levels of satisfaction. Interaction among the residents and between the administration and the residents may have contributed substantially to residents' satisfaction. The private housing project was smaller and it is sponsored by the Catholic Church. Puerto Ricans are primarily Catholics, also Catholic establishments, such as nursing homes, schools, and others have a good standing on the island. This feeling of close human contacts may have influenced the degree of satisfaction of the respondents as well as a feeling of comfort at being a part of a Catholic-sponsored project.

To have a gardening area was the only housing aspect that resulted in significant difference in level of importance between the respondents of Altergarten Las Teresas and

Comunidad del Retiro. Respondents from Comunidad del Retiro gave greater importance to having a gardening area than the respondents from Altergarten Las Teresas. In general, the respondents from Comunidad del Retiro were younger than the ones in Altergarten Las Teresas. This may indicate that younger elderly need to be provided with more alternatives for activities. Also this might be related to the desire to interact more with nature and land as they would if they lived in single-family houses in Puerto Rico, that usually have yards for gardening.

Contrary to what might be expected, the satisfaction level was not higher for residents of the newer project although the new project had incorporated the newest concepts in the designing for the elderly. It can be concluded from this that factors other than design and physical features may affect the degree of satisfaction of the residents. Communal facilities for the residents and the nearness to necessary services were important factors and these were more accessible in the older project.

Over time, housing projects can be expected to develop more communal facilities and supporting services within the project and surrounding it. Also, as residents live in the project for longer periods of time, there will likely be an increase in the sense of community and an accompanying increase in satisfaction. Thus, some of the differences between the projects may lessen over time as services build up around the newer project.

Recommendations

The recommendations submitted by the researcher for this study are as follows:

1. Follow-up studies should be made to analyze those factors that affect the satisfaction of residents with the location of the housing project.

2. Further research should look at "spillover" effects of satisfaction with the most important aspects as it influences satisfaction with other less important aspects.

3. Follow-up studies should be made regarding the provision of a safe balcony in the apartments and/or the corridors of the congregate housing for the elderly.

4. Follow-up studies to determine if the existence of a sense of community affects the degree of satisfaction of the residents should be made.

5. Sample size should be larger for future, similar studies.

6. In order to increase the residents' satisfaction with Comunidad del Retiro, the administration of this housing project must increase some of the communal facilities for the residents. The improvement of public transportation service and the provision of an area for the payment of utilities and to receive social services as welfare and the improvement of emergency medical facilities must be considered in the nearest future.

Observations

Many respondents showed great interest in being near educational and recreational facilities. However, those facilities were not equally close to both of the projects.

A variety of activities should be available for the elderly to make their free time more stimulating. As was observed, the common activities in which most of the elderly spent their time were watching T. V. in their apartments, going to places such as shopping, medical services, and visiting offices for social services. In Comunidad del Retiro, the elderly also used to go to pay for their utilities and many of them go downstairs to the lobby area to sit there or carry their own portable chairs and sit next to the building in the yard.

Comunidad del Retiro does not have balconies in the apartments or in the corridors, also there is not a covered sitting area provided for the residents in the yard. This might be a reason why many of the residents sit in the lobby area and outside. Also another reason might be the need for socialization and communication with others that they lose if they remain alone in their apartments.

Regarding the orientation of the buildings, Altergarten Las Teresas was better oriented. Apartments in both sides of the building were receiving almost the same amount of air circulation. But the location of the buildings in Comunidad del Retiro were oriented in such a way that the

the apartments of one side of the two tower received all the wind coming from the east. Therefore, the apartments on the other side received almost no wind. The apartments on the west side were too warm while the east side the wind was sometimes so strong that it bothered residents.

Not having a balcony worsened the situation for the residents on the west side of the building in Comunidad del Retiro. A balcony provides an exterior area that makes possible more circulation of fresh air. The provision of balconies in congregate housing for the elderly was strongly recommended by Green (1976). Balconies are also part of the typical house construction in the island.

The high-rise type of construction without balconies is new in the island. It was expected that many, if not all, of the respondents in the sample for this study came from houses or apartments that had balconies or porches. The previous experience of having a balcony in their previous housing might have affected their satisfaction with their present housing. To change to new housing without a balcony limits the residents' contact with the outside space and pushes them to make some changes and adaptation in their style of living.

Altergarten Las Teresas and Comunidad del Retiro were located near to each other, only five minutes by car. But they differ in their location regarding the neighborhood. Altergarten Las Teresas is located inside a residential area with many services, like medical and shopping nearby.

However, Comunidad del Retiro is located in a mixed-use area near, but not inside a residential area. Elderly people in Comunidad del Retiro who did not have cars had to walk about ten minutes to the highway to take public transportation. Crossing the highway presents a problem for these residents because of the risk involved. This disadvantage of having to cross the highway in order to obtain most services the residents need, might be the reason for the lower satisfaction level of the respondents from Comunidad del Retiro.

Another of the observations that the researcher wanted to point out is that none of the projects had a senior activity center in the project or adjacent to it. The elderly did not have the choice to participate in daily activities provided for them in which they can interact and socialize with other residents as well as educate and recreate during their leisure time. Also the provision of a senior center in which other elderly who live near the project can participate, helps in the better integration of the residents of the congregate housing project into the neighboring community.

Regarding the educational level of the respondents, it is interesting to observe that the highest education for over two-thirds of the respondents was secondary school to college, while for Puerto Rico as a whole, over 70 percent of the elderly were illiterate (PRWC, 1978, p. 19). It could be that congregate housing for the elderly is a new

alternative and less, well-educated people are not willing to change and to adapt to this new type of housing. Another reason for this higher educational level of the elderly living in this housing might be that the less-educated people have less ability to search for improved housing (Hoeskstra, 1976) or possibly are not as readily aware of it due to more limited skills in gaining knowledge and information.

In general, the respondents of the housing projects were more satisfied than dissatisfied with their housing. This showed the acceptance of these residents for this type of housing. However, recommendations based on the findings of this and similar studies should be considered in the future design of such housing in order to satisfy most of the needs of the elderly in Puerto Rico. Also provisions should be taken in order to assure that this subsidized housing will be offered as a housing alternative to the most needy elderly.

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APPENDIXES

APPENDIX A

LETTER OF INTRODUCTION

7 de agosto de 1979

Estimado Residente:

Usted ha sido seleccionado para participar en un estudio sobre las necesidades y satisfacciones en relacion a la vivienda. Las personas seleccionadas para participar en este estudio son personas de 65 anos en adelante que viven en edificios para envejecientes en San Juan.

El proposito de este estudio es el de mejorar la vivienda de las personas envejecientes. Su cooperacion es muy importante, pues solo personas como usted nos pueden decir que ustedes necesitan en su hogar.

Su participacion en este estudio sera completamente confidencial, pues su nombre no es requerido en la entrevista, ademas la informacion sera usada solamente en el estudio.

Su cooperacion es muy importante para el exito de este estudio.

Esperando saludarle el _____ de agosto de 1979 entre _____ y _____, quedo

Cordialmente,

Sarah Toledo Toledo
Economista del Hogar
Servicio de Extension Agricola

August 7, 1979

Dear Resident:

You have been chosen to participate in a study about housing needs and satisfactions. The participants in this study are persons of 65 years or older who are living in housing projects for elderly in San Juan.

The purpose of this study is to assess the needs of the elderly in order to improve their housing. Your cooperation is very important in order to get valid information for the success of the study.

The information collected will be kept confidential and reported only as a summary of the data. Your name is not required for the interview.

I hope to see you on August _____ at _____.

I remain,

Sincerely,

Sarah Toledo
Home Economist
Agricultural Extension Service

APPENDIX B
QUESTIONNAIRE

CUESTIONARIO

I. Identificacion

- _____ 1. Numero del proyecto o edificio
- _____ 2. Numero del piso
- a) 1ro al 5to piso
 - b) 6to al 10mo piso
 - c) 11avo al 15to
- _____ 3. Tipo de apartamento
- a) "Efficiency", "Studio"
 - b) con 1 dormitorio
- _____ 4. Sexo del entrevistado
- a) femenino
 - b) masculino
- _____ 5. Que edad tiene usted?
- a) de 65 a 69 años
 - b) de 70 a 74 años
 - c) de 75 a 79 años
 - d) de 80 a 84 años
 - e) de 85 o mas
- _____ 6. Cual es su estado civil?
- a) soltero/a
 - b) casado/a
 - c) divorciado/a
 - d) viudo/a
 - e) separado/a
- _____ 7. Como vive actualmente?
- a) solo/a
 - b) su conyugue vive con usted
 - c) otros familiares viven con usted
 - d) amigos viven con usted
- _____ 8. Como usted se siente de salud?
- a) Excelente
 - b) Bien
 - c) Regular
 - d) Mal

- _____ 9. Como su estado de salud le afecta para hacer lo que tiene que hacer todos los dias?
- a) Puedo hacerlo todo sin necesitar ayuda de otra persona.
 - b) Puedo hacer la mayoria de las cosas sin la ayuda de otra persona.
 - c) Necesita ayuda para hacer la mayoria de las cosas
 - d) Necesita ayuda para todo lo que tiene que hacer.
- _____ 10. Cual es su nivel educativo?
- a) No sabe leer ni escribir
 - b) Estudio o termino escuela elemental (primer al sexto grado)
 - c) Estudio parte o termino escuela intermedia (septimo al noveno grado).
 - d) Estudio parte o termino escuela superior (decimo al undecimo grado).
 - e) Estudio cursos universitarios o similar. Obtuvo algun grado? _____
Cual? _____
- _____ 11. Cual es su mayor fuente de ingreso?
- a) Empleo
 - b) Seguro Social
 - c) Sistema de Retiro (pension)
 - d) Asistencia publica (ayuda del gobierno)
 - e) Ayuda de familiares
 - f) Otra _____.
- _____ 12. Tiene otra fuente de ingreso?. Indique cual es.
- a) No
 - b) Empleo
 - c) Seguro Social
 - d) Asistencia publica (ayuda del gobierno)
 - e) Sistema de Retiro (pension)
 - f) Ayuda de familiares
 - g) Otra _____
13. Cuanto tiempo hace que vive en este apartamento?

14. Cuanto paga de renta o alquiler mensual en este apartamento? _____

15. Cuanto paga aproximadamente de agua y luz todos los meses? _____

_____ 16. En general, cual es el medio de transportacion que usted usa con mas frecuencia para ir a diferentes lugares?

- a) en carro propio
- b) en carro con amigos o familiares
- c) en guagua o carro publico
- d) caminando
- e) otra _____

II. Ahora les voy a leer una lista de comodidades o requisitos necesarios en una vivienda para personas de mayor edad. Favor de indicarme hasta que punto es importante cada uno para usted. Le va a asignar un valor del 1 al 5.

5 es muy importante	4 es importante	3 neutral	2 es poco importante	1 no es importante
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A. Diseño del Apartamento

	5	4	3	2	1
17. Tener suficiente espacio para almacenar o guardar en todo el apartamento.					
18. Que los gabinetes de cocina esten a una altura que usted pueda alcanzar lo que hay dentro facilmente.					
19. Tener suficiente claridad en las areas en las que usted trabaja, como la cocina y dentro de armarios grandes.					
20. Tener una bombilla o lampera cerca de la cama.					
21. Tener suficiente espacio para trabajar en la cocina					

	5	4	3	2	1
22. Tener espacio en el baño para que pueda circular una silla de ruedas.					
23. Tener barras o tubos de seguridad en el area de ducha o bañera en el bano.					
24. Que el piso en todo el apartamento no resbale, especialmente en el baño					
25. Tener suficiente ventilacion natural para que el apartamento sea fresco.					
26. Tener tranquilidad y sin ruidos de afuera.					
27. Que el apartamento sea facil de limpiar.					
28. Tener un balcon.					

B. Servicios en areas comunales para los residentes del proyecto.

29. Tener un espacio para lavar ropa.					
30. Tener un area o espacio de reuniones o diversion dentro del edificio					
31. Tener un area o espacio de reuniones o diversion en el patio del edificio.					
32. Tener una oficina para pagar la renta o alquiler, agua, luz, y telefono.					
33. Tener una cafeteria.					
34. Tener area para realizar labores manuales o artesanias.					

	5	4	3	2	1
35. Tener espacio en el patio para la siembra de hortalizas y jardin					
36. Que ofrezca la facilidad de visitas de parientes y amigos.					
37. Que ofresca la oportunidad de conocer personas de diferentes edades. (Ej., adultos, jovenes, ninos y adolescentes)					
38. Que de la oportunidad de participar en actividades con otros residentes del edificio.					

C. Vecindario y Alrededores

39. Estar cerca de familiares y amigos.					
40. Estar en un area o sitio tranquilo de la ciudad.					
41. Que sea seguro para los que caminan a pie.					
42. Que tenga transportacion publica.					
43. Que tenga cerca oficinas de servicios publicos a donde se pueda llegar a pie facilmente.					
44. Que tenga una iglesia cerca.					
45. Que tenga servicios medicos cerca.					
46. Que tenga tiendas cerca.					
47. Que tenga facilidades recreativas y educativas					

III. Favor indicarme ahora cual es su grado de satisfaccion con las condiciones de su apartamento en relacion a los aspectos que le voy a mencionar (o sea hasta que punto llena sus necesidades). Para indicar su grado de satisfaccion, usaremos los numeros del 1 al 5.

5 Estoy muy Satisfecho	4 Estoy Satisfecho	3 Neutral	2 Estoy poco Satisfecho	1 No estoy Satisfecho
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A. Diseño del Apartamento	5	4	3	2	1	Razones si Contesta No. 1
48. Espacio en el apartamento para almacenar o guardar.						
49. La altura de gabinetes y tablillas						
50. Cantidad de iluminacion o claridad en la cocina y adentro de armarios grandes						
51. Bombilla o lampara cerca de la cama.						
52. Cantidad de espacio para trabajar en la cocina						
53. Cantidad de espacio en el baño.						
54. Medidas de seguridad para evitar caidas en el baño						
55. Ventilacion o frescura en el apartamento						
56. Tranquilidad, sin ruidos molestos						
57. Facilidad para hacer limpieza.						

	5	4	3	2	1	Razones si Contesta #1
58. Balcon u otra area exterior en el apartamento.						
59. Color del aparta- mento.						
60. Tipo de piso en el apartamento						
61. Clases de ventanas en el apartamento						
62. Piso en que se encuentra su apartamento						

B. Diseno del Edificio

63. Numero de pisos en el edificio						
64. Forma del edifi- cio.						
65. Area de entrada o recepcion del edificio.						

C. Servicios en el edificio para los residentes.

66. Area para lavar ropa.						
67. Area de reuniones o diversion fuera del edificio.						
68. Area de reuniones o diversion dentro del edificio.						
69. Oficina de servi- cio para pagar el alquiler, agua y luz.						

	5	4	3	2	1	Razones si Contesta #1
70. Facilidades de visitas de parientes y amigos						
71. Oportunidad de conocer personas de diferentes edades (adultos, jovenes, ninos, y adolescentes).						
72. Oportunidad de participar en actividades con otros residentes del edificio.						

D. Facilidades y Servicios en el Vecindario

73. Distancia del edificio a las casas de familiares y amigos.						
74. Seguridad al caminar en el vecindario.						
75. Distancia desde el edificio a oficinas de servicios medicos.						
76. Medios de transportacion publico disponibles						
77. Distancia de las tiendas para comprar						
78. Distancia de la iglesia						
79. Distancia de oficinas de ayuda del gobierno.						
80. Distancia a facilidades recreativas y educativas.						

QUESTIONNAIRE

I. Identification

- _____ 1. Project Number
- _____ 2. Floor Number
- a) 1st to 5th Floor
 - b) 6th to 10th Floor
 - c) 11th to 15th Floor
- _____ 3. Apartment Type
- a) Efficiency
 - b) One-bedroom
- _____ 4. Sex
- a) Female
 - b) Male
- _____ 5. What is your age?
- a) 65 to 69 years
 - b) 70 to 74 years
 - c) 75 to 79 years
 - d) 80 to 84 years
 - e) 85 or over
- _____ 6. What is your marital status?
- a) Never married
 - b) Married
 - c) Divorced
 - d) Widow or widower
 - e) Separated
- _____ 7. What is your living arrangement?
- a) Live alone
 - b) Your spouse lives with you
 - c) Other relatives live with you
 - d) Non-relatives live with you
- _____ 8. How do you rate your health?
- a) Excellent
 - b) Good
 - c) Fair
 - d) Poor

- _____ 9. How does your health status influence what you have to do from day to day?
- a) Can do everything without help
 - b) Can do most things without help
 - c) Need help to do most things
 - d) Need help to do most activities
- _____ 10. What is your educational level?
- a) Do not know how to read or to write
 - b) Attended part or completed primary school.
 - c) Attended part or completed secondary school.
 - d) Attended part or completed high school
 - e) Attended part or completed University
- _____ 11. What is your primary source of income?
- a) Employment
 - b) Social security
 - c) Retirement system
 - d) Public Assistance
 - e) Donations from relatives
 - f) Other
- _____ 12. Do you have additional income?
- a) No
 - b) Employment
 - c) Social Security
 - d) Retirement System
 - e) Public Assistance
 - f) Donations from Relatives
 - g) Other
13. How long have you lived here? _____
14. How much rent do you pay each month? _____
15. How much do you spend on water and electricity each month? _____
- _____ 16. How do you get to places you need to go?
- a) Personal car
 - b) Ride with friends
 - c) Bus
 - d) Walk
 - e) Other

II. In this section, please tell me to what degree the following housing aspects are important to you. Here is a card showing the scale we will use. A "1" will signify very low importance and a "5" will signify very high importance.

5 Very High	4 High	3 Fair	2 Low	1 Very Low
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A. Physical Design Features.

	5	4	3	2	1
17. Plenty of Storage					
18. Convenient height of storage cabinets.					
19. Convenient amount of light at work areas such as kitchen cabinets and inside larger closets.					
20. Location of a lamp or light switch near your bed.					
21. Adequate space to work in the kitchen					
22. Convenient space in the bathroom for the circulation of a wheelchair.					
23. Grab bars in the bathroom					
24. Slip-resistant floor					
25. Adequate circulation of fresh air inside the apartment					
26. Quiet, free from loud noises heard from neighboring apartments.					
27. Easy-to-clean apartment					
28. Balcony					

B. Services provided for residents within the building.

	5	4	3	2	1
29. Laundry area					
30. Indoor meeting and recreational area.					
31. Outdoor meeting and recreational area.					
32. Convenient office for the payment of rent and utilities					
33. Cafeteria					
34. Arts and Crafts room					
35. Gardening area					
36. Opportunity to be visited					
37. Opportunity to be in contact with younger people.					
38. Opportunity to participate in social activities with the residents in the project					
39. Near relatives and friends					
40. In a quiet area of the city					
41. Safe for pedestrians					
42. With public transportation					
43. With most services at a convenient walking distance					
44. With church					
45. With medical services					
46. With shopping area					
47. With recreational and educational facilities					

III. Please attempt to rank your satisfaction or dissatisfaction with the following housing aspects on a scale from one to five. Here is a card showing the scale we will use. A "1" will signify you are dissatisfied; a "5" will signify you are very satisfied.

5 Very Satisfied	4 Satisfied	3 Neutral	2 Dissatis- fied	1 Very Dissatis- fied
------------------------	----------------	--------------	------------------------	--------------------------------

	5	4	3	2	1	Reasons if Dissatisfied
48. The amount of Storage						
49. Height of storage cabinets						
50. Amount of light at work areas such as the kitchen and inside closets						
51. Location of a lamp or light switch in relation to your bed.						
52. Amount of space for work in the kitchen						
53. Amount of space in the bathroom						
54. Safety measures in the bathroom						
55. Circulation of fresh air inside the apartment						
56. Freedom from loud noises						
57. Ease of cleaning apartment						
58. Balcony						
59. Apartment Color						
60. Flooring material						

	5	4	3	2	1	Reasons if Dissatisfied
61. Kind of windows						
62. Floor location, in which is the apartment						

B. Building Design

63. Height of the building						
64. Design of the building						
65. Lobby or reception area in the building						

C. Services provided for the residents within the Building.

66. Laundry Area						
67. Indoor meeting and recreational area.						
68. Outdoor meeting and recreational area						
69. Office for the payment of rent and utilities						
70. Opportunity to be visited						
71. Opportunity to be in contact with younger people						
72. Opportunity to participate in social activities with the residents in the project						

D. Neighborhood

73. The nearness to relatives						
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	5	4	3	2	1	Reasons if Dissatisfied
74. Safety for pedestrians						
75. The nearness to medical services						
76. Accessibility of public transportation						
77. The nearness to shopping area						
78. The nearness to church						
79. The nearness to offices for public service						
80. The nearness to educational and recreational facilities						

APPENDIX C

H.U.D. PROGRAMS FOR HOUSING
FOR THE ELDERLY

14.157 HOUSING FOR THE ELDERLY OR HANDICAPPED

(202)

FEDERAL AGENCY: HOUSING, DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

AUTHORIZATION: Housing Act of 1959, as amended by the Housing and Community Development Act of 1974, Title II, Public Law 86-372 12 U.S.C. 1701q, 73 Stat. 654, 667.

OBJECTIVES: To provide for rental or cooperative housing and related facilities (such as central dining) for the elderly or handicapped.

TYPES OF ASSISTANCE: Direct Loans.

USES AND USE RESTRICTIONS: Direct loans may be used to finance the construction or rehabilitation of rental or cooperative detached, semidetached, row, walk-up or elevator-type structures.

ELIGIBILITY REQUIREMENTS:

Applicant Eligibility: Private nonprofit corporations and consumer cooperatives, public bodies and their instrumentalities are not eligible Section 202 applicants.

Beneficiary Eligibility: Beneficiaries of housing developed under this program must be elderly (62 years of age or older), physically handicapped, or developmentally disabled. Families whose incomes fall within 80 percent of the median family income for the area in which the project is located may benefit from subsidy payments under the Section 8 Housing Assistance Payments Program.

Credentials/Documentation: The nonprofit applicant and borrower must receive certification of eligibility from HUD. The applicant must submit financial statements to support its ability to provide a capital investment of 1/2 of 1 percent of the mortgage amount, up to a maximum of \$10,000.

APPLICATION AND AWARD PROCESS:

Preapplication Coordination: At the Section 8 processing stage, a copy of each application/proposal will be forwarded to the Chief Executive Officer of the unit of local government in which the housing is to be located. The cover letter will invite a response within 30 days. Within threshold limits of the procedures for Protection and Enhancement of the Environmental Quality (36 F.R. 19182), an environmental impact statement may be required for this program. Applications are subject to State and areawide clearinghouses review pursuant to procedures in Part I, Attachment A of OMB Circular No. A-95 (revised).

Application Procedure: Applicants must submit a Request for Fund Reservation in response to an invitation published in the Federal Register, to the office specified in the invitation.

Award Procedure: Applications are reviewed and selected for funding against Regional allocations. Those selected for funding must meet the requirements of the Section 8 program. The Request for Direct Loan Financing, using FHA Form 2013, is reviewed to determine acceptability of project site and market, correctness of zoning, effect on environment, value of site and financial feasibility.

Deadlines: Applications must be submitted within the time period specified in the invitation, usually 6 to 10 weeks.

Range of Approval/Disapproval Time: Data not yet available on which to make a determination.

Appeals: None.

Renewals: None.

ASSISTANCE CONSIDERATIONS:

Formula and Matching Requirements: Not applicable.

Length and Time Phasing of Assistance: The loan period may not exceed 40 years. Section 8 payments may not exceed 20 years. To maintain fund reservation, project must be placed under construction within 18 months from the time the notice of approval is received. One extension may be granted, not to exceed six months. Funds will be advanced on a monthly basis during construction for work in place.

POST ASSISTANCE REQUIREMENTS:

Reports: Any change in the borrower during the period of the loan must be approved by HUD. All borrowers will be required to submit an annual financial statement to HUD.

Audits: HUD reserves the right to audit the accounts of the borrower in order to determine compliance and conformance with HUD regulations and standards.

Records: Regular financial reports are required. Borrowers must service and maintain records in accordance with acceptable mortgage practices and HUD regulations. Borrower must also supply those necessary to indicate compliance with the Section 8 contract.

FINANCIAL INFORMATION:

Account Identification: 86-4115-0-3-371.

Obligations: (Loans) FY 78 \$749,627,000; FY 79 est \$824,361,000; and FY 80 est \$800,000,000.

Range and Average of Financial Assistance: Approximate average award \$3,300,000.

PROGRAM ACCOMPLISHMENT: In fiscal year 1978, 19,973 units were funded for a total of \$749,600,000.

REGULATIONS, GUIDELINES, AND LITERATURE: 24 CFR 885; HUD Handbook 4571.1 Rev.

INFORMATION CONTACTS:

Regional or Local Office: Contact the appropriate HUD Area or In-suring Office listed in the address appendix.

Headquarters Office: Multifamily Development Division, Office of Multifamily Housing Development (Housing), Department of Housing and Urban Development, Washington, DC 20410. Telephone: (202) 755-5720.

RELATED PROGRAMS: 14.141, Nonprofit Housing Sponsor Loans—Planning Projects for Low and Moderate Income Families; 14.156, Lower-Income Housing Assistance Program.

EXAMPLES OF FUNDED PROJECTS: Not applicable.

CRITERIA FOR SELECTING PROPOSALS: Not applicable.

Source: 1979 Catalog of Federal
Domestic Assistance
Government Printing
Office, Washington, D.C.

14.156 LOWER—INCOME HOUSING ASSISTANCE PROGRAM

(Section 8—Housing Assistance Payments Program for Lower Income Families)

FEDERAL AGENCY: HOUSING, DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

AUTHORIZATION: Housing Act of 1937, Public Law 75-412; 42 U.S.C. 1401-1435, as amended by the Housing and Community Development Act of 1974, Public Law 93-383; 88 Stat. 662, 42 U.S.C. 1437f; the Supplemental Housing Authorization Act of 1977, Public Law 95-24; 91 Stat. 53; and the Housing and Community Development Act of 1977, Public Law 95-128; 91 Stat. 1111; Housing and Community Development Amendments of 1978, Public Law 95- 557; 92 Stat. 2080.

OBJECTIVES: To aid lower-income families in obtaining decent, safe and sanitary housing in private accommodations and to promote economically mixed existing, newly constructed, and substantially rehabilitated housing.

TYPES OF ASSISTANCE: Direct Payments for Specified Use.

USES AND USE RESTRICTIONS: Provides housing assistance payments to participating private owners and Public Housing Agencies to provide decent, safe and sanitary housing for lower and very low-income families at rents they can afford. Housing assistance payments are used to make up the difference between the maximum approved rent due to the owner for the dwelling unit which is reasonable in relation to comparable market units and the occupant family's required contribution towards rent. Assisted families are required to contribute not less than 15, nor more than 25 percent of their adjusted family income toward rent.

ELIGIBILITY REQUIREMENTS:

Applicant Eligibility: Any private owner (profit-motivated and non-profit, cooperative, or an authorized public housing agency (any State, county, municipality or other governmental entity or public body (or agency or instrumentality thereof) which is authorized to engage in or assist in the development or operation of housing for low-income families).

Beneficiary Eligibility: Very low-income families (whose income does not exceed 50 percent of the median income for the area as determined by the Secretary with adjustments for smaller and larger families); lower income families (whose income does not exceed 80 percent of the median income for the area adjusted for family size). A very low income or lower income single person who is elderly, disabled or handicapped, displaced, or the remaining member of an eligible tenant family is also eligible. At least 30 percent of the families assisted should be very low income families with gross incomes not in excess of 50 percent of area median income.

Credentials/Documentation: In the Existing and Moderate Rehabilitation Housing Program, the Public Housing Agency must support its application by furnishing data that the program proposed is consistent with any applicable Local Housing Assistance Plan. In the absence of such a Plan, demonstrate that the proposed program is responsive to the condition of the housing stock in the

community and the housing assistance needs of lower-income families (including the elderly, handicapped and disabled, large families and those displaced or who will be displaced) residing in or expected to reside in the community; and that there is or will be available in the area public facilities and services adequate to serve the proposed housing. In the case of a Housing Finance or Development Agency (HFDA) application, the HFDA shall provide certification that based upon an HFDA or HUDA-approved housing needs study, there is need for housing assistance for the number and size of units applied for. An application for housing to be newly constructed or substantially rehabilitated under the Section 8 HFDA program is exempt from the provisions of Section 213(a) of the HCD Act unless the unit of general local government in which the assistance is to be provided objects in its Housing Assistance Plan to the exemption. In the latter case, no application for housing may be approved by HUD unless HUD requirements implementing the provisions of Section 213 or the HCD Act have been satisfied. In the Section 8 New Construction and Substantial Rehabilitation Programs administered directly by HUD, proposals are generally submitted in response to Notifications of Fund Availability published for specific allocation areas, based on that area's Fair Share Allocations. Selections are generally made on a competitive basis. In the case of a geographic area for which there is an approved Housing Assistance Plan, the Economic and Market Analysis Division of HUD field offices will examine each Plan and prepare a recommended mix, number of units by bedroom size, and elderly/nonelderly distribution, which takes into account and is consistent with the contents of the Plan. In the case of a geographic area where there is no approved Housing Assistance Plan, the Economic and Market Analysis Division of HUD field offices will prepare a recommended program mix, number of units by bedroom distribution, and elderly/nonelderly mix.

APPLICATION AND AWARD PROCESS:

Preapplication Coordination: The Chief Executive Officer of the unit of general local government in which the proposed housing is to be carried out will have an opportunity to comment on the proposed housing. Where there is an approved Housing Assistance Plan, the local government has the opportunity to object to the approval of the application on the grounds that the application is inconsistent with its Housing Assistance Plan. Where there is no Housing Assistance Plan, the local government has an opportunity to comment upon, or provide information concerning the need for housing assistance and the availability of local facilities and public services to serve the proposed housing. The cover letter will invite a response within 30 days. Within threshold limits of the Procedures for Protection and Enhancement of Environmental Quality (38FR 19182), an environmental impact statement may be required for this program. Applications are subject to State and areawide clearinghouses review pursuant to procedures in Part I, Attachment A of OMB Circular No. A-95 (revised).

Application Procedure: Submission of Application for Housing Assistance Payments Program (Form HUD-52515), Existing Housing; Submission of application for Housing Assistance Payments Program (Form HUD-52515A), Moderate Rehabilitation; Submission for Assignment of Portion of Set-Aside to Specific Project, Housing Finance or Development Agencies (Form HUD-52516); and submission of Preliminary Proposals in response to a HUD "Notification of Fund Availability" or other invitation for newly constructed and/or substantially rehabilitated units.

Award Procedure: HUD Area or Insuring Office Director (or Regional Administrator for Region VIII) makes final decision to authorize approval of individual applications, or approve selection of Preliminary Proposals.

Deadlines: Generally, receipt of Preliminary Proposals for newly constructed and/or substantially rehabilitated housing by HUD shall be no less than 35 calendar days after the date of the first publication in a newspaper(s) of general circulation. Generally, applications for existing and moderately rehabilitated housing should be submitted within 30 days and 60 days, respectively, from the

date of HUD initiation. Modification of the deadline may be allowed, under certain circumstances.

Range of Approval/Disapproval Time: Approximately 30 to 90 days for receipt and clearance of preliminary applications and preliminary proposals, contingent upon method of production.

Appeals: Not applicable.

Renewals: Not applicable.

ASSISTANCE CONSIDERATIONS:

Formula and Matching Requirements: There are no matching requirements.

Length and Time Phasing of Assistance: Assistance payments for any unit may run for a minimum period of one month and for the following maximum periods. In the case of units under contract in the Existing and Moderate Rehabilitation programs, payments may be made generally for as long as 60 months and may be renewed twice for 60 months each. In the case of new or substantially rehabilitated units, payments may be made for up to 360 months (except that if the project is owned by or financed by a loan or loan guarantee from a State or local agency, payments may run for as long as 480 months).

POST ASSISTANCE REQUIREMENTS:

Reports: Initial Estimate of Required Annual Contributions (Preliminary Costs), HUD Form 52671; Estimate of Required Annual Contributions, HUD Form 52672; Estimate of Total Required Annual Contributions, HUD Form 52673; and Requisition for Partial Payment of Annual Contributions Housing Assistance Payments Program, HUD Form 52663; Housing Owners Certification and Application for Housing Assistance Payments, HUD Form 52670; Schedule of Housing Assistance Payments Payable, HUD Form 52670A.

Audits: Periodic fiscal, occupancy, general management and maintenance audits.

Records: Those necessary to indicate compliance with Annual Contributions Contract/Housing Assistance Payments Contract.

FINANCIAL INFORMATION:

Account Identification: 86-0139-0-1-604.

Obligations: (Direct payments) FY 78 \$21,100,424,000; FY 79 est \$25,367,704,000; and FY 80 est \$20,045,328,000

Range and Average of Financial Assistance: Amount necessary to lease units and cover related management and maintenance and operating expenses including utilities, not to exceed HUD approved reasonable rents for constructed or existing comparable units, offering equivalent accommodations, utilities and services, for the housing area in which the units will be located.

PROGRAM ACCOMPLISHMENTS: By the end of fiscal year 1978, a total of 666,603 units were receiving subsidies under this program.

REGULATIONS, GUIDELINES, AND LITERATURE: Section 8 Housing Assistance Payments Program, New Construction Processing Handbook 7420.1; Substantial Rehabilitation Processing Handbook, 7420.2; Existing Housing Processing Handbook, 7420.3; Housing Finance and Development Agencies Processing Handbook, 7420.4. Regulations published in Federal Register April 22, April 26, May 13, 1976, July 6, 1977; Accounting Handbook 7420.6 dated 8/6/78 and 12/29/78.

INFORMATION CONTACTS:

Regional or Local Office: HUD Field Office listed in the address appendix that has jurisdiction over the area in which the dwellings are to be located. For Region VIII, contact the HUD Assistant Regional Administrator for Housing.

Headquarters Office: Office of Public Housing and Indian Programs, Housing, Department of Housing and Urban Development, Washington, DC 20410. Telephone: (202) 755-6522.

RELATED PROGRAMS: 14.146, Low Income Housing-Assistance Program (Public Housing); 14.147, Low-Income Housing-Homeownership for Low-Income Families.

EXAMPLES OF FUNDED PROJECTS: Not applicable.

CRITERIA FOR SELECTING PROPOSALS: Not applicable.

Source: 1979 Catalog of Federal Domestic Assistance Government Printing Office, Washington, D. C.

VITA

Sarah Toledo Toledo

Candidate for the Degree of
Master of Science

Thesis: HOUSING NEEDS AND SATISFACTION OF THE ELDERLY IN
TWO CONGREGATE HOUSING PROJECTS IN SAN JUAN, PUERTO
RICO

Major Field: Housing, Design, and Consumer Resources

Biographical:

Personal Data: Born in San Juan, Puerto Rico, February
24, 1948, the daughter of Mr. and Mrs. Primitivo
Toledo

Education: Bachelor of Science in Home Economics,
University of Puerto Rico, San Juan, Puerto Rico,
1968; completed requirements for the Master of
Science degree at Oklahoma State University in
December, 1979.

Professional Experience: Agricultural Extension Ser-
vice Home Economist, 1968- .

Professional Organizations: American Home Economics
Association, Agricultural Extension Service Home
Economist Association, National Trust for Historic
Preservation, and American Society of Interior
Design.