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Norma Williams
University of North Texas

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ABSTRACT

Students of everyday life are making a significant contribution to understanding the manner in which persons carry out their daily activities. However, they have overlooked the impact of bureaucratic organizations on persons in various social settings. Based upon intensive in-depth interviews of sixty Mexican American elderly in Dallas, Texas, the research revealed numerous barriers to their utilization of health and social services and demonstrates why one must consider carefully how health and social service organizations affect the lives of elderly Mexican Americans. One must also recognize that the quality of life of Mexican American elders can be improved by increasing their knowledge of how formal organizations function.

We shall examine an issue that has received insufficient attention by applied social researchers as well as social scientists who are studying problems that face the economically and politically disadvantaged racial and ethnic minorities in the United States. In a broad sense, we shall consider how such formal (or bureaucratic) organizations as the health care system and social service agencies shape the everyday life of the Mexican American elderly. In a narrower sense, we shall consider the barriers or obstacles that the Mexican American elderly encounter in securing services to which they are legally entitled. In dealing with these issues we fill a gap in our knowledge about the Mexican American elderly who are members of the second largest minority group in the United States.

Central Issues

Following Weber, most social scientists assume that bureaucratic rules are interpreted and applied in a universalistic, rather than a particularistic, manner. Thus, all persons who interact with organizational personnel in their everyday lives are treated "equally" and "fairly." This ideal is widely accepted and is one which many organizational personnel typically seek to uphold. However, in practice the nature of bureaucratic organizations undermines the ideals of universalism. Formal organizations are used by persons who are in positions of privilege as a means by which they maintain or even advance their social and economic advantages and, at the same time, these organizational structures are used to keep economically and politically disadvantaged persons such as Mexican Americans "in their place." The social constraints on minorities are reinforced by various kinds of racial and ethnic discrimination (Feagin and Feagin 1978).

One of my general goals is to provide an empirical grounding for a number of abstract generalizations in the literature. I wish to show how the everyday life of the Mexican American elderly is affected by organizational structures such as social agencies. One group of sociologists reasons that naturally occurring interaction is the basis of understanding society (Adler, Adler and Fontana 1987). They are critical of the "reification" of social structure or organizations (Karp and Yoels 1993). However, if we are to understand the everyday life of the economically and politically disadvantaged, such as the Mexican American elderly, we must recognize that the power of these organizations is real and affects how people interact in their daily lives. The Mexican American elderly are dependent on formal organizations, and they have little control over how the personnel apply the rules. By failing to examine the relationship between human agents and

organizations, social scientists ignore the latter's impact on people's everyday lives.

I develop my presentation in the following manner. I first outline the theoretical orientation regarding bureaucratic organizations and then discuss the kinds of data which I use in my analysis. Next, I will examine how the interaction of the Mexican American elderly with organizations shapes their everyday life. I conclude by discussing some of the larger theoretical and social policy issues, including programs of social intervention that will improve the quality of life of elderly Mexican Americans.

The Nature of Bureaucratic Organizations

We take as a starting point for analyzing bureaucracy the general framework outlined by Max Weber (Gerth and Mills, 1946). These organizations are characterized by, for example, hierarchy of authority, a complex division of labor, and a high degree of standardization on which the principle of efficiency is based. Weber also analyzed the role of universalistic criteria in hiring and promoting personnel and discussed how the role of the "office" is more significant than the person who occupies it.

Although an analysis of bureaucracy begins with Max Weber, it is possible to advance one's analysis by relying on contemporary sociologists such as Giddens (1984).[1] Giddens discusses the enabling and constraining functions of organizations, and he brings human agents into the study of organizations. However, Giddens does not give sufficient attention to the fact that organizations are more enabling for the privileged than for the nonprivileged sectors of a community.

As a result of the nature of bureaucratic organizations, the ideal of universalism is far more difficult to achieve than most students of bureaucracy have recognized. The hierarchy of authority, the specialization, and the stress on efficiency all make it difficult, if not at times impossible, for agency personnel to adhere to universalistic criteria in providing services for elderly Mexican Americans.

To understand these patterns we need to examine organizations more closely. As one moves from the top to the bottom of these organizations, the division of labor typically becomes greater and the rules more complex in nature. Persons in positions of power or authority are typically subject to fewer rules (or constraints) than the functionaries below, and the former have greater flexibility in interpret-

ing the rules than do the latter. In practice, organizational leaders (or managers) delegate blameability under the guise of responsibility. When the managers delegate responsibilities to lower-level functionaries, they are also able to blame them for any difficulties the organization encounters. It is not uncommon for the organizational leadership to engage in "deniability" for any failures of the organization and to place the blame on those who have less power. Consequently lower-level personnel become cautious in interpreting the rules. For example, the lower-level personnel must be very careful not to interpret rules in favor of clients, for their actions may undermine the efficiency of the organization or the ideal of "system maintenance." In the process of maintaining the system, the leadership of organizations seeks to translate larger social issues into narrow technical ones. Thus, as Dill (1993) suggests, the organizational objectives override the needs of the clients.

Given this situation, the elderly Mexican Americans must interact with organizational personnel who are constrained by complex rules and often fearful of being blamed for errors (or mistakes). Yet we lack details about the process of interaction between economically and politically disadvantaged clients and the personnel who must conform to organizational rules (cf. Piven and Cloward 1971). We need more than an understanding of the providers' and clients' expectations of one another (Trevino 1988). Although we can not ignore these, we must understand the gap between the knowledge systems of providers and clients. Only then can we begin to cope with existing difficulties.

The Nature of the Data

During the summer of 1991 (and to some extent thereafter) I carried out fieldwork on the Mexican American elderly in Dallas, Texas. In the 1980s the Hispanic population in Dallas County had grown very rapidly (Murdock and Ellis 1991). By 1990 the Dallas-Fort Worth Metropolitan Area contained the eighth largest Hispanic population in the United States (Garcia 1993:6).

With regard to the sample, I interviewed 60 elderly Mexican Americans and carried out some field observations relating to the issues discussed below. The persons interviewed were typically between 60 and 85 years of age. However, two women were 59 and two persons were over 90 years of age.

I employed a snowball sample. In order to increase the diversity with respect, for example, to age, gender, and marital status in the sample, I used different "contact persons" in order to locate my initial respondents. Then a number of the

interviewees gave me names of persons whom I could interview. Also, to ensure that different subgroups of Mexican American elderly were in my sample, I interviewed respondents who lived in different neighborhoods (cf. Maldonado 1988). Although this procedure was time consuming, it meant that a rather diverse group of elderly Mexican Americans were interviewed.

The respondents were usually very helpful and cooperative. I was able, in part because I am Mexican American, to establish rapport with them. Also, I am bilingual; thus a number of interviews were conducted in Spanish. In addition, some of the respondents had grown up (or had relatives and friends) in South Texas. Inasmuch as I grew up in this region I had a basis for establishing a common bond with a number of respondents.

The resistance I encountered resulted from suspicion by the elderly of any strangers. The elderly Mexican Americans typically live in poor neighborhoods where the crime rate is high, and they have good reason to be fearful of anyone they do not know. In addition, some of the elderly are suspicious of white-collar officials, for they have had negative encounters with them in the past.

As in a previous study (Williams 1990), I utilized an interview guide. I asked all respondents standard background questions, and I asked all respondents about particular problems. Yet, the interview guide permitted me to explore some issues in depth. I would follow up their answers with additional questions or would probe by making various comments. The conversational style made the respondents feel at ease.

The primary objective in this fieldwork was to identify the social and linguistic barriers the respondents encountered in securing assistance from health and social service agencies. To achieve this objective, I asked questions about the social and economic backgrounds of the respondents.

Social Background and Family Relationships of the Elderly

Most of the elderly I studied in Dallas were poor; often they were very poor. Many of them were in ill health, and they lived in apartments and houses that were run down and provided the barest form of shelter. The present social circumstances of the Mexican American elderly are a result of their social backgrounds. Most of them had little formal education, and they always had to work in low-paying jobs. With only a few exceptions, the only income these elderly received were their Social Security checks.

When these Mexican Americans were young, educational opportunities for Mexican Americans in Texas (and elsewhere in the Southwest) were limited.

Although many barriers to education for Mexican Americans continue to exist, they are not as severe as when these respondents were young. Because of their poverty a number of respondents had to work at an early age in order to help support their family. Some found it difficult to attend school because of the lack of transportation. Still others suffered from discrimination in schools because of their poverty or minority group position (cf. Williams 1993).

The lack of formal education meant that the Mexican American elderly had to work at low-paying jobs. In the process they suffered from the "Zoë Baird problem." After President Clinton selected Ms. Baird as the Attorney General nominee in 1993, it was learned during the confirmation hearings by the U. S. Senate that she and her husband had not paid Social Security taxes for persons who cared for their children and the household. That incident led to a number of news accounts about how the privileged avoid paying Social Security benefits for their household help. But the pattern of avoiding paying Social Security taxes by individual employers or small businesses has existed for decades. A number of the Mexican American elderly realized that their employers had not paid Social Security taxes, and today they are perhaps receiving less money than they might otherwise have received.

But the plight of the poor elderly has not just been affected by their lack of education and work histories. Their current familial relationships make life difficult for them. The Mexican American elderly in Dallas did not, contrary to assumptions by many social scientists and social service personnel, receive support from an extended family system (cf. Trevino 1988). No one I interviewed had close ties to extended kin members—their brothers and sisters or nieces and nephews. As a result of geographical mobility a number of the elderly had lost all ties with their extended family members. Or they have outlived their brothers and sisters.

The lack of extended familial ties among the Mexican American elderly in Dallas supports the findings in my earlier research (Williams, 1990). In my study of working-class and business and professional families in the Austin, Corpus Christi, and the Kingsville region in Texas, I found that the extended family had disappeared as a basis for economic and social support. For many of these Mexican Americans the funeral ritual was the last link to the extended family.

In the case of the elderly in Dallas, the bonds with their children and grandchildren were tenuous. A number of their children or grandchildren lived outside the Dallas area. When their children or grandchildren lived in Dallas, they often lived outside of the respondent's immediate neighborhood. The limited means of transportation, as well as the lack of telephones because of their poverty, made it difficult for the Mexican American elderly to sustain ties with their

children and grandchildren. Also, few of the children of these elderly had achieved educational and occupational success. They were struggling to make ends meet. Moreover, some of their children were divorced or had other family problems that made familial ties difficult to maintain.

In some cases the Mexican American elderly were assisting their children. For example, I spoke with a few elderly who were taking care of their grandchildren so that the mother could work, and they were worried about what would happen to their children and grandchildren if they became ill or died (Williams 1993).

Interaction with Health and Social Service Agencies

The elderly Mexican American respondents wanted to discuss the obstacles or barriers they encounter in securing basic social services. However, one cannot understand these barriers without giving special attention to the Mexican American elderly's "stock of knowledge." Garfinkel (Heritage 1987), following Schutz, has emphasized the importance of one's stock of knowledge in carrying out one's activities (Holmes 1992). In everyday life, the knowledge of human agents overlaps with their cultural values and beliefs. Also social knowledge overlaps with the meanings that are so important in social interaction (Blumer 1969). While not ignoring cultural values or meaning, we shall, for purposes of this paper, give primary attention to the gap in social knowledge between agency personnel and the elderly, particularly the Mexican American elderly (cf. Rathbone-McCuan 1992).

That social knowledge requires special attention is supported by the work of Weick (1992) who draws a distinction between "professional knowledge" and "lay knowledge." The knowledge of the former may be at odds with the knowledge of the latter.

The knowledge system of the elderly Mexican Americans does not prepare them to interact in an effective way with organizational personnel. They lack knowledge of how members of professions define their everyday life experiences. For example, they are unaware of how physicians define the aging process with respect to various illnesses. In an even more specific sense, the elderly's lack of knowledge of the rules of the organization is basic to understanding some of the most important obstacles they encounter in gaining access to health and human services. As discussed earlier, these persons have had little formal education. Nevertheless, health and social service agencies expect clients to complete a

variety of complex forms. These forms are important for the agency in its effort to maintain internal accountability and to justify its activities with the general public. Although these forms may serve the needs of an agency, they often do not serve the needs of clients who are poor.

The Mexican American elderly are not only unable to read complex rules but some of them cannot read or speak English with any degree of fluency. They therefore find themselves in social situations in which they do not know what questions to ask. The observations of some of the respondents suggest that having to admit that one lacks basic information undermines one's self-esteem.

It is not just that the Mexican Americans cannot fill out forms; they also lack the proper knowledge of how to appeal decisions that are made against them. They seem unaware of the fact that most organizations have procedures by which negative decisions can be appealed. It is not only a lack of knowledge about how to fill out forms but a lack of knowledge of how organizations function that is a serious handicap for securing health and social services.

The Mexican American elderly's "stock of knowledge" adversely affects them in still other ways. They often have insufficient knowledge about the services they receive. This situation becomes serious in the area of health. For the elderly often do not understand what the health professionals are telling them. On a number of occasions respondents, who knew I had a doctorate, assumed I was a physician, and they began asking me about the prescribed medication they were taking. They had not been informed, in terms they understood, about how they should take their medications and the effect the medicine may have on them.

If one examines the health and social service agencies from the perspective of the Mexican American elderly, we find that there are few, if any, personnel who are able to assist the elderly in securing services or, as in the area of health, to provide the clients with the knowledge they needed to take these medications in a proper manner. These agencies are often understaffed and their personnel overworked. In addition, the personnel lack knowledge of Mexican American cultural beliefs and values. And they typically do not know Spanish. Respondents quite often complained about being unable to speak to someone in Spanish.

Another body of data I have collected suggests that personnel of health and social service agencies often work on a false assumption about the family patterns of contemporary Mexican Americans. (This false premise is also held by many social scientists.) The agency personnel assume that the Mexican American elderly have extended families to assist them. However, extended family arrangements (as noted above) do not provide social or economic support for the Mexican American elderly in Dallas. In practice, the elderly are generally unable to rely on

their children or grandchildren for social and economic support, for the elderly's bonds with their children (and grandchildren) are tenuous. Also, contrary to many gerontologists, who indicate that children intervene in behalf of their parents in obtaining social services, the children in this study had not acquired the knowledge by which they can intervene with agency personnel in behalf of their parents. The interaction of the Mexican American elderly with health and social service agencies leads us to re-evaluate ongoing research on everyday life. Most of the researchers who are studying everyday life assume that "people transform their organizations as well as themselves through their interaction with one another" (Karp and Yoels 1993:205). But this generalization assumes equality among actors and overlooks the power relationships between organizations and the poor. The elderly may be transformed by their interaction with the agency personnel, but to think that the elderly poor reshape the structure of agencies overlooks the former's lack of political and economic power and knowledge.

Up to this point, I have emphasized the manner in which Mexican American elderly's "stock of knowledge" affects the way in which they secure and utilize basic services. But still other obstacles for securing adequate health and social services exist for the elderly. One is access to these services. The elderly, who live in the poorer sections of Dallas, often lack adequate transportation. Even frail or ill elderly typically must travel by bus and this means they may have to transfer several times before they arrive at their destination. In some instances their lack of transportation means they cannot make use of limited services that are provided. For example, some respondents were unable to make use of their food stamp allotment. It would have cost them more to take a taxi to the grocery store than the food stamps were worth. Even after the Mexican American elderly arrive at an agency they may find themselves having to wait. Queuing is a way of life for many of the Mexican American elderly, particularly when they are seeking health services. A number of respondents stated that they had to go to the hospital early in the morning and wait all day in order to secure needed medical services. And some had to return the next day and wait again. Having to wait in line undermines one's definition of self, one's sense of dignity and self-worth. This too is part of the everyday life of many elderly Mexican Americans.

Implications for Social Policy

There are a number of implications for social policy of the research I carried out on the Mexican American elderly. I outline some of these.

1. Although social surveys are an important means of gaining knowledge of social policy, they are not the only source of data on which we should rely. We need data not just on background characteristics or attitudes of persons but also on their everyday life activities (cf. Facio 1993). The symbolic interactionists in sociology have emphasized the importance of gathering data on persons in actual social situations and understanding their definition of the situation (cf. Mead 1934; Blumer 1969).

However, the symbolic interactionists have typically not analyzed the interaction of human agents with organizational personnel who work in bureaucratic structures (Vaughan and Sjoberg 1984). Many symbolic interactionists view organizations and structures as reifications, and state that we must emphasize interactions among persons. What they overlook is that persons, including professionals, who work in bureaucratic settings are greatly constrained by rules. Therefore, the elderly Mexican American client interacts more with the "office" than with the "authentic person." In effect many personnel respond to their clients by stating that "I work here and these are the rules."

The rule-oriented action of bureaucratic personnel greatly affects the lives of the Mexican American elderly, for they depend on health and social service agencies for basic necessities. Yet they lack knowledge of, or ready access to, the agencies on which they depend. For example, many elderly speak Spanish as their first language, and they lack the formal education that policymakers and organizational personnel take for granted.

We learn from research on the elderly in Dallas that persons with little formal education encounter serious barriers in securing needed health and social services. The persons who need the most attention seem to be the least likely to receive it. This finding and its implications have not found their way into the literature in gerontology (Clair, Karp, and Yoels 1993; Hooyman and Kiyak 1993).

2. The relationship between the Mexican American elderly and bureaucratic organizations has implications for the debates about the present problems faced by the politically and economically disadvantaged Hispanic population. Moore and Pinderhughes (1993) have edited a highly significant volume, *In the Barrios: Latinos and the Underclass Debate*.[2] The editors and their collaborators assess the relevance of Wilson's (1987) widely discussed book, *The Truly Disadvantaged*, for understanding what is happening to the Hispanic population in urban centers. The editors and the contributors emphasize the importance of economic restructuring for the persistence and growth of a Hispanic "underclass."

Although economic restructuring is a major factor in understanding the difficulties encountered by the Hispanic poor, other social arrangements must be considered. I have emphasized the importance of examining the way in which bureaucratic organizations limit access of the poor to health and other social services. Although I studied the Mexican American elderly, the issues about organizations and the plight of the Hispanic poor can also be observed if one examined the drop-out rates of Hispanic (or Mexican American) youth. To comprehend these drop-out rates we must understand the manner in which the school setting, as a bureaucratic organization, keeps the nonprivileged in their place. If we are to understand the Hispanic (or Mexican American) poor as outlined by Moore, Pinderhughes, and their collaborators, we must examine the role of bureaucratic restructuring in keeping the poor in their place.

3. We need to look closely at possible intervention strategies for assisting the poor Mexican American elderly. I do not expect bureaucratic organizations to be restructured any time soon; however, moderate steps could be effective in helping the poor Mexican American elderly. One step is to develop programs that aid the elderly in gaining more knowledge about the health and social service agencies with which they interact. Although lacking formal education, these persons are seeking this kind of information, and modest programs could greatly improve the quality of life of persons who have worked hard all their lives. Another step would be the training of constructive brokers (Zurcher 1986) in different neighborhoods. These brokers, who would be educated as to how organizations operate, could assist others who need to know about the system: how does one fill out complex forms, how can one appeal rulings, and so on. These modest steps would do much to alleviate the harsh conditions the elderly Mexican Americans face in their daily lives.

NOTES

1. The materials I have relied on for my analysis of bureaucratic organizations include Sjoberg, Brymer, and Farris (1966); Williams, Sjoberg, and Sjoberg (1983); Sjoberg, Vaughan, and Williams (1984); and Lipsky (1980).

2. Although the concept of "underclass" can be easily misused, I will not consider that issue in this paper.

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