

A Study of Caring for the Elderly by the Families and Extended Families Within a Korean Clan Village

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Purpose. This ethnography is aimed at describing the care-giving practices of the nuclear family and relatives of the elderly within a clan village in relation to their socio-cultural context. Four basic notions of the study came from Leininger's culture care theory and the nurse-client negotiation model of Anderson. In order to understand the cultural system of caring, the following questions were explored: What caring behaviors are performed for the elderly person in a clan and how do these behavior relate to the various components of that particular culture?

Method. Data for this study was gathered through twenty-one fieldwork expeditions between September 1994 and December 2002 using interviews and participant observation of 7 families drawn from two extended families. Data was analyzed using the techniques of taxonomy, value, and proxemics analysis.

Findings. The socio-cultural context of caring for elderly people, their caring values, and four categories of caring were explored. Values of caring and every day life in the clan were hierarchical, reciprocal, and collective. The four categories of caring were: being with, empowering, keeping territory, and enhancing spirituality.

Conclusions. The results of this study can be used to understand culture-specific care and to provide culturally congruent care for the elderly in a clinical setting.

Key Words: Care, Family, Elderly, Ethnography

INTRODUCTION

Human care is one of the most essential and powerful forces that help people recover from illnesses, maintain health, and survive (Leininger, 1981, 1984). Therefore, nurses as a direct caregiver need to discover and know fully the nature, essence, and expression of human care.

In many health care settings, nurses care for clients faced with life crisis such as birth, illness, aging, or death. For the elderly, some of these painful crisis are very immediate. Moreover, considering the sharp increase of the elderly population in Korea, discovering how caring can lead to a beneficial outcome in helping

elderly remain healthy, recover from illnesses, or face death is a major and essential focus of gerontological nursing care practices (Choi, 2000).

Every culture provides explanations for the experiences of the inevitable crisis that develop in life and a system of rules for care that members of a community use to confront these problems in everyday living (Aamodt, 1978). Thus, meanings, expressions, patterns, processes, and structural forms of care have both different and similar characteristics among all cultures and subcultures.

In the clinical process, especially in a developing country, there are cultural discrepancies between the professional nursing care and folk care (Anderson, 1990). In

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addition to this cultural difference between care provider and consumer, elderly clients suffer from a generational gap. These “cultural lags” could become obstacles to effective nursing care. As Leininger (1988) suggested, culturally congruent nursing care can only occur when folk or lay care values, expressions, or patterns are known and used appropriately and meaningfully by the nurse.

However, the study of care is difficult because of its covert, variable, and multidimensional features. To overcome this methodological problem, I decided to explore the caring behaviors among family members using a qualitative approach. In traditional society, a nuclear family and extended family is a unit for human survival. The family takes on primary responsibility of nurturing and caring for their members, especially for very young and elderly. In Korea, Dangnae and Munjung, the kinship structures in traditional Korean society, are important secondary social groups. These secondary groups contain intimate social networking to support group members. Relatives from Dangnae (an extended family comprised of 5 generations) more closely interact with each other in everyday lives. In this social network, family and relatives internalize the interpretation of social reality by significant others. Thus, the cultural caring behaviors can be easily observed in a family and extended family. A qualitative approach, especially ethnography, was recommended to understand the elderly and caring for them in relation to their cultural system (Brandreit, 1994). As Spradley noted (1990), ethnography offers health personnel the chance to apprehend the world from the viewpoint of a client who lives by different value systems.

A culture establishes patterns of behavior for the particular groups of people that constitute that culture. The components of a particular culture contribute to the establishment and reinforcement of specific codes of conduct; in other words, the components of a culture can point to that culture as a whole. Thus, an investigation of the caring behaviors by a specific group of people involves a thorough scrutiny of all aspects of their culture (Dougherty, 1978).

The purpose of this study is to describe caring behaviors as perceived and practiced by family and relatives in a clan village. The basic notions of this study came from Leininger's culture care theory and nurse-client negotiation model of Anderson: 1) caring is the central and unifying domain for the body of knowledge and practices in nursing; 2) discrepancies exist between nurses and client

about adequate care-giving; 3) nurses adopt roles as cultural brokers in the process of culture care; 4) attempts need to assure the goal of nursing as an accomplished means of understanding the client's perspective in the context of their culture. In order to understand the cultural system of care, the following questions were explored. 1) What are the caring behaviors performed for the elderly in a clan? 2) How does this behavior relate to the various components of that particular culture?

METHODS

Ethnographic fieldwork

Informants sampling

During the research which began in January 1990 as part of a study designated as ‘caring for people in life crises’, with a strong focus on the crisis of birth, I developed an understanding of the most salient caring categories. This information served as the starting point for this research. The key informants for this study were 7 nuclear families from two extended families: 4 families who live with their elderly parent, 3 families who live apart from their elderly parents. The 10 members of the clan also participated in this study. Informants were recruited for inclusion in the study after a period of preliminary research in this village. During this period of fieldwork, a deliberate effort was made to sample and identify key informants and potential study participants using the theoretical sampling method.

Data collection

The data collected in the field studies were categorized as basic data, data of a socio-cultural context, and information, using the categorization method of Ellen (1984). Basic data and data relating to a socio-cultural context were collected through interviews with the public officials of Namwon city and village residents responsible for administrative decisions between January 1990 and October 1992 and have been revised up to December 2002. Literature, ‘The book of Namwon’ was also used as a data resource on socio-cultural context. Information pertaining to the topic of this study was gathered in twenty-one different fieldwork projects, each of which took 2 to 10 days, between September 1994 and December 2002. These included ethnographic interviews and participant observations. In the interviews, descriptive questions, structured questions, and contrast questions were used. The questions included, for exam-

ple: What do you think of good caring? ; What do you do for the sake of older people's health? ; What is your role in caring for your older parents or relatives? ; What do you expect your daughter and son, nephew, relatives of any other clan members to do for you? The participant observations were done in the daily life of the informants focusing on caring behavior for their elderly parents and relatives. In the observation-participation exercises, I took on the role of a participant as observer or that of an observer as participant, depending on the activity or event.

To enhance the credibility of the data other residents of the village, elderly and their caregiver provided verification. Data on history, folklore, and dialect were verified by relevant literature and by consultations with specialists.

Data Analysis

Reflective thinking continued throughout the process of data analysis. Line by line analyses and highlighting analyses were conducted. Spradley's (1990) taxonomic analysis, Werner and Scheople's (1987) value analysis, and Cho's (2001) proxemics methodology were used. The key informants verified the data on a number of occasions, and data were also modified in accordance with suggestions made by the elderly participants. The co-worker for the former research crosschecked the results.

Ethical Considerations

Most of the informants of the study lacked reading and writing skills because formal education had not been made available to them. Therefore, permission to conduct the interviews was given verbally rather than in writing. Field studies took place in the off-season, lest it should interfere with farming work. Some of the studies inevitably took place in the busy season and, in such cases, the researchers lent a helping hand with the farming work. Issues that the informants refused to discuss were not addressed, neither directly nor indirectly. Interviews were recorded only with the permission of the interviewees. Comments that might have a negative effect on informants, and comments and contextual data that residents did not wish to be disclosed, were excluded from this report. All informants will be noted as anonymous. Specific information relating to the identity and social status of the informants has not been included.

The final permission to report the results of the study was obtained from elderly informants on April 26th,

2003.

FINDINGS AND DISCUSSION

Socio-cultural context

Ethnohistory of the clan and cultural traits

The field for this study was a rice-farming, naturally formed village, 18 kilometers from Namwon City. The village was first established in the 7th Century during the Shilla Dynasty. This early village was situated 1 kilometer from the current location (Cho, 1976). It was moved to its current location in the middle of the 17th Century (A.D. 1649) with the construction of Robong Seoweon, a Confucian shrine and auditorium. At the end of the 19th Century, a clan community began to form at the eastern end of the village.

As of 2002, the village contained 51 households. In the early 1970s, 33 households were of the same clan and 6 were relatives of the clan. With increased industrialization during the 1970s and 1980s, clan members began moving away from the village to the cities. Presently, 18 clan households and 11 relatives' households remain in the village, including the original residents who came to the village from elsewhere with the construction of the Confucian shrine. Among 18 clan households the two Dangnae, stem families of Pumjae and Seoungman ancestors, are well organized and recognized as possessing authority. The stem family of Pumjae is the head of the clan and they have the rights to the clan's properties, including the West Mountain. The stem family of Seoungman occupied the Jumbangee valley near the West Mountain.

The village is rather cut off from the outside world because the West Mountain (Poong-ak Mountain) shelters it. The village, including the West Mountain, is largely divided into areas designated as the space of the ancestors and the space of the descendants. The West Mountain has four ranges of hills. Each range accommodates the tombs of the descendants of different cliques within the clan. The biggest hill is the holy hill, which is the space of god. In the 1980s, the graveyard for the clan's head family was formed at the top of the holy hill. The greatest ancestor's tomb is situated at the very top of the hill and graves for the descendants of each generation have been built below the ancestors' graves. Women's graves are built to the left of men's.

The descendants' residential area starts from the middle part of Rojeok Peak (height 580 m) and follows the

valley down to the plain area, where the entrance to the village is located. The space of the descendants is divided into three areas, Weon(superior), Jung(middle), and Are(inferior), according to location and residents' social status. The head family and the servants live in the Woen area, relatives and original residents dwell in the Jung area, and new residents and non-clan members inhabit the Are area. An individual's social status and rights are decided not by ability or merit but by the location of their family home within the village, and the proximity of that home to that of the head family.

The residents may practice Buddhism, Christianity, or Confucianism but, regardless of religious affiliation, the key religious practice is that of seeking blessing. In the main, Confucianism dominates daily lifestyles. For example, a Sungjoo table, a symbol of folk religion, is prepared next to the main table for the Confucian ancestors worship. To these people, what a religion does for the health and wealth of the family is more important than the religion itself. Therefore, religious rituals are quite hybrid, and it is not uncommon to see frequent changes of religious practice.

The Older Person in Context

This society has a relatively large population of elderly residents; 32% of the 151 residents are at least 65 years old. The social status and roles of the elderly are strongly linked to patriarchal trait of this community. Men are considered superior to women and a wife's status within the community is based on that of her husband. Women, especially young, are not recognized as members of society; they live as minorities, at the margins of society. A woman's life as a marginalized individual begins with birth and is reinforced by the wedding rituals and the Syjipsali, a painful life training for the bride. During 3 years of wedding rituals, if the dowry or the presents of a bride are not satisfactory, the groom's family has the right to terminate the marriage agreement and to punish the bride by mistreating her or depriving her of her right to visit her family. The role of women is as the 'mother of a family' and, as such, she assumes some responsibilities: looking after the family members, worshipping the ancestors, extending the family by giving birth to sons. A woman who is perceived to have failed in carrying out these duties can be expelled from the family. The older persons in the groom's family, of course, make these decisions. Because remaining within a group is essential to survival in this society, young women must cater to the

needs of the elderly in order to gain and maintain their own status.

When a woman successfully raises a son and becomes old, the woman earns status within the family equal to what a man obtains at birth and is looked after extremely well. As an informant noted, a female elderly becomes "a person who will not be blamed for anything wherever she goes, and a person who is happy since she doesn't need to fear banishment."

Another cultural trait linked to the social status of the elderly is family structure and regulations. As any other traditional Asian community demonstrated by Roberts (1978), the clan has having arrangements in which members of the family live together as a unit. In this community, families are comprised of the father and his growing family. After the sons are grown, and after the father has died, the oldest son become the head and the younger sons separate to start their own households near the head family. The continuity of several family branches is thus assured. All rights of family life and properties belong to the head of family, usually to the older man. Women transfer a granary key, a symbol of women's duties, to her daughter-in-law one year after her wedding. However, the rights of a woman as 'mother of a family' are delegated to her after her mother-in-law has died. In every family, an older person occupies the Keunbang, the largest living room and a symbol of authority.

The elderly of this clan have their own land and building and perform essential tasks in the household. The majority of men over 65 years of age continue to be in the labor force. Female elderly interact actively with each other in everyday life and farming. The older person of the clan takes on a role of moral teacher and decision maker on important issues of clan's life. Another role is as cultural broker between ancestors and descendants. These older persons are respected as vice-ancestor and Eeuren (big men or father-men) of the clan.

Cultural values in caring and everyday life

As can be seen in the layout of the village, the predominant patterns for behavior are hierarchical, reciprocal, and collective. The rules of hierarchy apply not only to personal interaction, but also to familial interaction. A clan/non-clan standard primarily determines status. The two head families of the clan society are scholars; relatives of these head families called Yangban (noblemen) are next in rank; relatives of the relatives are called 'half-relatives', and take up the next ranking, with non-clan

families holding the lowest rank. Sex, age, and birth order in the family determine the social ranking of an individual.

High-status families are characterized as large, serious, and centralized. Low-status families, on the other hand, are characterized as small, unimportant, and variable. The high-status families are obligated to take care of the low-status families with benevolence, strictness and love. The low-status families, in turn, are obligated to serve the high-status families with respect and obedience.

The rules of reciprocity apply to all interactions, which include financial and labor relations, as well as care-giving relations:

Human life is ruled by the principle of the circulating mulesal (the wheel of a spinning wheel). As you can see in the folklore “Koryeujang, a story of a bad son”, if you mistreat your parent, then your son will mistreat you the same well. Because you received care from your parents when you were young, you must return their favors when they become old and ill (Informant 1).

In the reciprocal code of conducts, there are no set rules as to the number, type, or time duration for the exchanges, but in the end, a similar degree of interaction occurs on each side. From this rule of reciprocity, the concept of descendants compensating for the benefits received by ancestors has been formulated. What this means is that compensation for an action extends to the next generation.

Collectivity is a trait that defines a group as a survival unit; this feature places emphasis on the importance of the group over that of the individual. Hierarchy and reciprocity are strictly observed within groups, but become less strict as groups move apart. For example, Pumashi, the reciprocal exchange of farming labor or caring, is allowed among clan members and close neighbors, but non-clan and those who live outside the village are paid to do the work on a contract basis. Likewise, hierarchy is stricter within a family than it is between and among families. These codes of conduct have been used as a means to secure and reinforce the benefit and survival of the clan with vested rights.

Categories of Caring behaviors

The four caring categories underlie the behavior that were perceived as caring by the elderly and their family; being with, empowering, keeping territory, enhancing

spirituality,

Being with: presence and maintaining a relationship

In this category of caring, the act of living with their older parents and keeping a relation as a family or relative through frequent contact such as visiting or phone calls are included.

For the informants, living with and caring for an older parent is perceived as the inherent duty of family, especially for the oldest son:

How can we regard as a son the guy who lives apart from his parents! Oh, No! If you are going to do your job as a son, at least you have to stay in your parent's home (Informant 2).

I know that caring for elderly is not easy. Ah ha—. It is impossible for me to explain exactly how difficult it was. However, it is a dori (duty) of a human being that I live with my older parents and care for them. Heaven, the god of everything, gave me parents. The human relation between parents and sons is a gift from the heaven (Informant 3).

Non-resident sons or daughters visit or call their parents frequently. These activities create the context of presence. Physical presence of sons and daughter, a sharing of silence and of inter-subjective unspoken, embodied love, interest, and concern radiate from and embrace the family involved. Presence offer older parents an environment of safety and fulfillment. Elderly Informants are proud of their sons' visiting courteously.

Ee Hum, I am so busy today. My son will arrive tomorrow evening. I should prepare many things for him. Delicious foods, clean quilt—. I have no seconds for being with you. Enjoy yourself, all my friends! (Informant 4).

Extended family residents also visit their elderly as frequently as they do non-resident sons or daughters. On the other hand, clan members who are not involved in the extended family relations visit the older people only occasionally. These activities of extended family and clan relatives are not associated in a context of presence. Rather, their activities focus on enhancing the bond of a social network. During the visiting, they seemed to focus on an expression of Jeoung (humanity) as a member of clan;

She is my niece. We participate all together in Dangae's affairs such as wedding, ancestor rituals, new years greeting, or any other important life events. That is an expression of Jeoung as part of a one family (Informant 5).

Empowering: physical and psychosocial

The older person is very frail physically and emotionally. Most of elderly informants have lost physical strength and their activity is confined to the home and amongst neighbors. Their concerns are also confined to their family and they have become very sensitive. Extremely old informants aged 90 or more humiliate themselves. They feel shame for their weakness, illiteracy, lowered sensory of hearing, and even aging itself. Therefore, supporting and promoting the physical and psychosocial power of elderly is a very important form of caring.

To maintain and promote physical power in the elderly, they are given their favorite foods as well as health food such as vitamins or boyangsik (food for promoting health) and Poyak (a herbal medicine for promoting physical strength). To maintain and promote psychosocial strength, the family informs the parents of all family affairs. The bad news is not related so as to not shock older parents. These caring activities are the obligation of the nuclear family and are conducted in everyday life.

In the process of empowering, the role of an extended family is as a supporter and aid. They provide food to older relatives when they prepare non-ordinary food or food for special rituals. If the nuclear family left home and can't support their parents, this obligation is delegated temporarily to the extended family.

The clan relatives also prepare special food and are concerned with emotional support for the older person. The meaning and intention of relatives is not the same for all families. Special food and soothing words may use by them as a means for displaying attention and concern rather than as a means for physical empowerment.

Keeping territory: respect and protect

The status of an older person in this community is not assured by chronological age itself. In this hierarchical group oriented society, the status of an individual is determined by the group he or she is involved with and whether or not the group is of high status and possesses wealth. Therefore, a family and extended family must keep the status within the clan for the sake of an individ-

ual's wealth. One strategy to achieve this goal is to protect and promote the status of an elderly head person within their group,

The acts of caring in this category vary, from passive activity such as keeping the physical space of elderly so as not to intrude on their authority to actively engaging in enhancing political power within the clan.

Elderly informants occupy a larger space than a younger person in the clan. The space of an older person in the family is larger than within an extended family or clan. For example, a stem family of the elderly must greet their parents in dining. On the other hand, the clan relatives greet each other in a room. In greeting, parents and their sons or daughter maintain public distance while the clan maintains personal distance.

The older person has a right to use the space of a younger person and freely engage in the territory of all clan members. But, this right is not permitted to the younger person. The act of protecting and confirming the physical space and territory of an older person is a means to maintain their rights and pay respect to older relatives.

A more active act to maintain territory of older parents is to extend their political power. All the rights to determine family affairs, even the choice of dishes for dinner, belong to the older person. The important affairs of a clan such as using the graveyard or building a house in the village can be carried out only with the permission of an elderly of the head family.

Enhancing spirituality: extending the time and space

The greatest threat for the elderly is to face immediate death. In the later stages of life, elderly informants focus on preparing for their impending death and life beyond this world. As we showed in the former study focusing on dying and death (Cho, 1997), elderly informants perceive that the physical being will disappear with the end of life, and they begin to extend the self by moving their identity to their ancestors and their grand sons. Their concerns are extended from the descendants' space to the buried ancestor's. Thus, they extend their time and space of being.

The family caregiver has an obligation to prepare material for parents' death such as a graveyard, coffin, or shroud. To strengthen the relation with the ancestor and get recognition from them, an older person must keep and extend the property of household. Elderly informants meet this obligation with the help of their sons.

Another means to extend the 'self-identity' of an older person is through religious life. For the frail elderly, it is not easy to visit a Buddhist temple or church. Again, the family member has an obligation to prepare the material for religious activities such as preparing a Bible, money for Buddhist light, or a holly table for rituals. More directly, family members attend worship at church or a temple with their parents.

Extended family and other clan members also support an older person's religious life. Their act of caring to keep and support an older relative's religious life is more indirect and passive. They don't care to infringe on the religious activity and to blame the faith of older relatives. These acts can be regarded as good caring for this Confucian society.

CONCLUSION

Most research oriented in biomedical framework of health care include information on disease and treatment but often ignore everyday notions about health and the facilitation of a quality of life. Changes during the last quarter of the 20th century in health practices are emphasizing humanistic values. Consumers of health service are seeking alternative ways for achieving optimal health. Health professionals increasingly recognize that health and illness are largely determined by factors that operate outside of the domain of the formal health care delivery system. Culture care nursing is one of these trends (Aamodt, 1978).

The clan involved in this study is an exception to the assumption derived from the modernization model of aging. That is, modernization and industrialization cause a sharp decline in status and integration of the aged, and likewise the quality of caring for the elderly decline as seen in many Western societies (Forner, 1984; Roberts, 1978). Older persons in the clan are respected as a vice-ancestor and an authorized father-man. They result in the exercise of authority by a senior group of council of elders whose authority is backed by the influence and sanctions of ancestors on whose good will the well-being of the entire group ultimately depends. The lives of the elderly and their family in the study area are built on the concepts of collectivity, hierarchy, and reciprocity. These are also the elements that structure caring for the elderly parents and relatives. Four categories of caring explored in this study were being with, empowering, keeping territory, and enhancing spirituality.

In caring for aged parents and relatives, nuclear families and extended families was perceived as differing in terms of intensity, extent of expression, and underlying intention. Caring for elderly is perceived as a part of an inherited obligation (*dori*) of the family and humanity (*Jeoung*) of the relatives.

Culture care theorists argue that the body of nursing knowledge can be advanced only when the universal and non-universal folk and professional caring behavior, beliefs, and practice are studied in a cross-cultural context and this acquisition of knowledge informs the care taking process (Gaut & Leininger, 1990; Gaut & Boykin, 1994; Reynolds & Leininger, 1993). According to the notion of the nurses-client negotiation model, nurses recognize that discrepancies exist between nurse and client about notions of health, illness, and treatment or caring, and an attempt to bridge the gap between the nurse's and the client's perspectives (Anderson, 1990). The goal of nursing is to involve the client through active participation in the process of learning and acquiring healthy coping and living styles. The nurses and client may need to work out how the popular and scientific perspectives can be reconstructed within the context of the transaction to achieve goals that are in the client's interest (Trippe-Reimer & Brink, 1990). Understanding the differences between generic and professional care systems is the key to achieving the ultimate goal of nursing, which is to reduce suffering and to enhance the health of elderly. The results of this study will be served to construct the bridge over the cultural gap between elderly clients and nurses of our society.

According to another influential view of health care, a social network model, family, relatives, and friends internalize the interpretation of social reality by significant others. Therefore, the social network is a deciding factor in health care (Han, 2000). Research undertaken from this perspective found that the family is the major source for providing financial support for health care. In the Klienman's study focusing on the health care system in China, it is well demonstrated that Chinese families did not always follow the prescribed exercises for their family's patient (Klienman, 1980). What do health professionals need to know from the families that would permit the negotiation of caring that would be culturally acceptable to them? The results of this study give an answer to this question.

Gaut and Leininger (1990) argued that studying care first in the natural cultural contexts of the home and

community, before trying to make sense out of care in critical hospital settings, provide meaningful data about culture specific care. The results of this study may well contribute to the improvement of culturally specific care for the elderly in clinical settings. To fulfill our goal to provide the highest quality care for the elderly, studying care in a clinical setting is required.

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