Obligations to Stepparents Acquired in Later Life: Relationship Quality and Acuity of Needs

Lawrence Ganong\textsuperscript{1,2} and Marilyn Coleman\textsuperscript{2}

\textsuperscript{1}Sinclair School of Nursing and  
\textsuperscript{2}Department of Human Development and Family Studies, University of Missouri, Columbia.

\textbf{Objectives.} The purpose of this study was to examine beliefs about responsibilities of an adult child to an older stepparent or parent who has remarried later in life. We also investigated the effects of relationship quality and acuity of needs on perceived responsibilities to parents and stepparents.

\textbf{Methods.} We obtained a sample of 487 men and 571 women from across the United States by using a multistage probability sampling design that used random-digit dialing of telephone numbers. We presented respondents with a multiple-segment vignette in which the type of relationship between the adults (i.e., parent–child or stepparent–stepchild), the relationship quality, and the acuity of the older person’s need were randomly varied. Respondents indicated how much help the younger adult should give the older person and how obligated the younger adult was to help the older person. In addition, we asked respondents open-ended questions about the rationale for their judgments about intergenerational helping.

\textbf{Results.} Perceived responsibilities to parents were greater than responsibilities to stepparents. Relationship quality and acuity of need were also related to obligation beliefs.

\textbf{Discussion.} Stepparents acquired later in life generally are not seen as family members, and thus norms of family obligations do not apply to them.

Researchers have studied intergenerational obligation norms for many years (e.g., Hamon & Blieszner, 1990; Seelbach, 1978). They have conceptualized intergenerational obligations as socially defined standards or as generalized norms regarding obligations of family members to one another (Lee, Netzer, & Coward, 1994). Normative family obligations do not refer to specific individuals, but rather are general expectations for kin responsibilities. For example, “Kin norms are culturally defined rights and duties that specify the ways in which any pair of kin-related persons are expected to behave toward each other” (Rossi & Rossi, 1990, pp. 155–156), and “Family obligations can be seen as part of normative rules which . . . get applied in appropriate situations” (Finch, 1987, pp. 155–156). These “normative rules” are seen as guidelines that direct decisions and behaviors rather than as law-like rules to which people strictly adhere. Labels such as “kin norms” (Rossi & Rossi, 1990), “family obligations” (Ganong & Coleman, 1999), “norms of filial obligations” (Finley, Roberts, & Banahan, 1988), and “filial responsibility norms” (Rolf & Klemmack, 1986) have been applied to normative intergenerational obligations (Finch & Mason, 1993; Hanson, Sauer, & Seelbach, 1983; Wolfson, Handfield-Jones, Glass, McClaran, & Keyserlingk, 1993).

Normative beliefs about intergenerational obligations function as parameters within which individuals define and negotiate their personal responsibilities. They also provide criteria that individuals use to measure how well they are functioning as family members (Finch & Mason, 1993). For the most part, researchers have examined obligations between parents and adult children (e.g., Hamon & Blieszner, 1990; Lee et al., 1994; Seelbach, 1978; Sung, 1998; Wolfson et al., 1993).

In addition, some conceptual definitions of intergenerational normative obligations also involve personal dimensions. For instance, Lee and colleagues (1994) have argued that filial responsibility expectations may be either particularistic (i.e., what parents expect from their own children) or universalistic (i.e., norms pertaining to obligations between aging parents and adult children). Several researchers have conceptualized normative obligations in this more complex manner (e.g., Bengtson, 2001; Finley et al., 1988; Hamon & Blieszner, 1990; Lan, 2002; Lee et al., 1994).

The primary purpose of this study was to examine normative beliefs about obligations of an adult child to an older stepparent or parent who has remarried later in life. We also investigated the effects of relationship quality and acuity of needs on perceived obligations to parents and stepparents.

\textit{Motives for Intergenerational Obligations to Assist}

Most people agree in the abstract that assisting older kin by allocating resources to them is a familial responsibility, but in practice family members do not always provide such assistance (Angel & Angel, 1997). There likely are many reasons why families do or do not provide intergenerational assistance. Among the reasons proposed to explain the motives for assisting older kin are: a norm of family obligation, which is defined as culturally prescribed duties based on kinship (Seelbach, 1978); a norm of reciprocity, which is the belief that children owe a debt to parents that should be repaid as parents age (Albert, 1990; Brakman, 1995); and a norm of gratitude, which is the belief that offspring want to help parents because they are grateful for past parental help and sacrifices (Brakman). Filial obligations are also seen by some individuals as a moral duty that must be performed (Finch, 1989). Other
The notion of unspoken contracts of obligations and debts between generations is the basis of several theoretical models of intergenerational solidarity. For instance, in one model, help to older kin is a function of family obligation norms, emotional attachment, frequent interaction between family members, and perceptions that past exchanges have been reciprocal (Bengtson, Giarrusso, Silverstein, & Wang, 2000). In another solidarity model, assistance to older kin is thought to be based on frequent contact between generations, positive sentiments and agreement on values, commitment to meeting family responsibilities, and the opportunity structure for interaction (Rossi & Rossi, 1990). Most of the models explaining motives for intergenerational assistance to older parents are based on the assumption that parents’ care and nurturance of children when the children are young later elicits support from the younger generation when the parents are old and relatively more dependent.

Recently, some of these models, particularly the solidarity and normative family obligation frameworks, have been criticized for not recognizing inherent ambivalences in intergenerational relationships. Luescher and Pillemier (1998) argued for ambivalence as a general orientation to intergenerational relationships, including obligations. Luescher and Pillemier defined sociological ambivalence as occurring when competing or contradictory norms associated with a specific role require actions or attitudes that are not compatible. Psychological ambivalence occurs when a person experiences contradictory emotions, motivations, or values about another person or object. These two aspects of ambivalence are related. Luescher and Pillemier recognized that contradictory normative beliefs—such as belief in the norm of noninterference between the generations and the norm of filial obligations—contribute to ambivalent feelings about personal obligations. Consequently, they argued for more complex conceptualizations of intergenerational responsibilities. The ambivalence model proposes that intergenerational relationships are characterized by both positive and negative sentiments and motivations to help or withhold aid.

**Contexts and Intergenerational Obligations**

Most intergenerational researchers have defined normative obligations as unidimensional constructs that can be generalized across situations and contexts (e.g., Hamon & Blieszner, 1990; Lee et al., 1994; Sung, 1998). However, other researchers have reported that people view intergenerational aid not as responsibilities that must be performed, but as tasks to be done in selected contexts, but not in others (Finch & Mason, 1993; Rossi & Rossi, 1990). This latter group of researchers has defined normative obligations as dynamic, changing in response to alterations in family relationships and the contexts within which relationships exist.

As part of an extensive study of the parent–child bond over the life course, Rossi and Rossi (1990) studied obligation beliefs using a vignette technique and a factorial survey design (Rossi & Nock, 1982). They developed a hierarchical model representing levels of obligation to various family members (Rossi & Rossi). The model depicted nested concentric circles, and at the heart of the circles was the reciprocal relationship and obligation between parent and child. Relationships and obligations to stepparents fell near the middle of the circular pattern. In other words, the highest obligation was perceived between children and genetic parents, followed by parents-in-law and children-in-law. Lower levels of obligation were perceived toward stepparents. This hierarchy of obligations suggests that affinal kin acquired through remarriage evoke less obligation than affinal kin acquired through first marriages.

The hierarchical model of family obligations developed by Rossi and Rossi (1990) corresponds closely to traditional models of kinship definitions (Schneider, 1980). Relationships that were supported both by genetic and/or legal ties tended to be higher on Rossi and Rossi’s hierarchy, and those that lacked the genetic connection, in particular, were lower. However, shared kinship alone is not sufficient for individuals to attribute responsibilities to help; instead, intergenerational assistance is even to a close relative like a parent is a function of several factors, such as relationship quality or closeness, resources of the adult child, and the acuity of the need for aid (Ganong & Coleman, 1999). These and other factors serve as contexts within which individuals make judgments about whether to help and how obligated they are to help others.

**Later life parental remarriage and intergenerational helping.**—Decisions about providing intergenerational assistance for stepparents acquired later in life remarriage of older adults may not involve the same factors as decisions regarding resource allocations between adult children and their older parents. Even in long-term relationships, stepparent–stepchild bonds are more ambiguous than parent–child ties (Ganong & Coleman, 2004), and stepfamily members are not always sure about what they should do regarding intergenerational transfers (as Cherlin [1978] noted long ago, stepfamily members are unsure about normative responsibilities in part because of the lack of social institutionalization for stepfamilies).

It is likely that the emotional bonds between older stepparents and adult stepchildren in later life remarriage are less close than parent–child bonds because the older stepparents have spent little time with their adult stepchildren and neither person may be motivated to develop a relationship (White, 1994). It is unlikely that later life stepparent–stepchild relationships will result in strong feelings of family solidarity and kinship obligations. Moreover, other theoretical explanations proposed for intergenerational transfers between parents and children also may not be applicable to intergenerational transfers between stepchildren and newly acquired stepparents. For example, norms of gratitude, emotional attachments, and altruism based on genetic kinship are not likely to be the bases for judgments about intergenerational transfers between stepchildren and stepparents. Although intergenerational assistance as a moral duty could apply to stepparents who are acquired through a later life parental remarriage, it is likely that there would be few obligations to assist an older stepparent acquired later in life (Ganong, Coleman, Killian, & McDaniel, 1998).

**Relationship quality.**—In the few studies in which relationship quality or emotional closeness between family members
has been examined, people generally perceive that there are greater responsibilities to assist family members when the relationships are close than when they are distant (Ganong & Coleman, 1998; Ganong et al., 1998; Rossi & Rossi, 1990). Emotional closeness, or relationship quality, has been found to be more salient in making judgments about assistance exchanged in step-relationships than assistance exchanged in relationships between kin. Study participants have attached importance to how well stepparents and stepchildren got along with each other when attributing responsibilities to assist, in part because emotional closeness may indicate that the relationships were experienced and defined as familial bonds that carried with them familial obligations. Close bonds between stepparents and stepchildren increase the likelihood that family members and others define the relationship as quasi-kin or fictive kin. When fictive kin relationships are emotionally close, then obligations to them are similar to perceived obligations to genetic and adoptive kin (Ganong & Coleman, 1999).

Close emotional relationships may allow step-kin and other affinal kin such as in-laws to move up the hierarchy of obligations (Ganong & Coleman, 1999; Rossi & Rossi, 1990). It is possible that older stepparents who have good relationships with their adult stepchildren may be thought to be as deserving of help as parents, and may be seen as more deserving than parents who have not maintained close relationships or who have severed relationships with adult children.

**Acuity of older adult’s need.**—The more serious the need, the more likely people are to attribute some responsibility to family members to help (Ganong & Coleman, 1999). Acuity of need is not just defined as the demands of the task for which someone needs help; instead, it incorporates the magnitude of the individual’s need for aid, which includes the task, other assistance that potentially is available to the person, and the seriousness of the situation. Therefore, when older adults are facing a serious problem that they cannot overcome with their own resources and there are few or no other alternatives, younger kin are expected to help as much as they can. If there are any exceptions to this pattern—such as there being alternatives for assistance—then family members are generally expected to help in more limited ways, if at all. However, Litwak and colleagues’ theory of task specificity suggests that if the acuity of an older adult’s needs is too severe or requires skills that family members do not have, then family members might be thought to be less obligated to assist, because their abilities and capabilities would not be a good fit for the needs (Litwak, Messeri, & Silverstein, 1990).

**Hypotheses**

Questions about perceived obligations to older parents and stepparents following later life remarriage are becoming increasingly important because, as individuals live longer and are healthier, there is more remarriage among older adults (Kreider, 2005). Growing numbers of older adults are divorcing or have been divorced, and the number of older adults who are remarried is likely to rise (Kreider). Despite these demographic changes, prior research on beliefs about intergenerational assistance after remarriage has been relatively sparse (e.g., Finch & Mason, 1993; Pezzin & Schone, 1999; Rossi & Rossi, 1990).

Therefore, the specific aims of this project were (a) to examine normative beliefs about adults’ obligations to older widowed parents and stepparents, and (b) to assess the effects of selected contextual factors (i.e., relationship quality, acuity of need) on those beliefs. We examined two types of tasks—help with activities of daily living (ADLs) and assistance in maintaining health regimens. The hypotheses were:

H1: Obligations to assist older parents are greater than obligations to assist older stepparents.

H2: Obligations to assist older stepparents are greater when the quality of relationships is good than when it is not good.

H3: Obligations to older parents are unrelated to relationship quality.

H4: Obligations to assist parents and stepparents are related to the acuity of the need for aid.

In addition, we explored which, if any, respondent characteristics were related to judgments about intergenerational assistance. The characteristics were age, gender, household income, marital status, level of education, race and ethnicity, religiosity, and prior experience with intergenerational transfers. We also explored the underlying reasons for respondents’ judgments about intergenerational assistance to older parents and stepparents.

**METHODS**

**Sample**

The sample was 487 men and 571 women from across the United States. The mean age was 43.5 years (range = 17–94 years). More than half (n = 716) had children, and 165 were stepparents. Of the 42% that were married, about 25% were remarried. Nearly one third of the sample had never married, 16% were divorced or separated, and about 8% were widowed. The largest racial or ethnic group was White European American (63%), but 16% were African American, 10% were Latino or Hispanic, and 4% were Asian American. About 1% were American Indian, and 5% indicated that they were multiracial. Approximately 25% were Catholic, 38% were Protestant, 2% were Jewish, 1% had no religious preference, and the rest identified other faiths. Nine percent did not finish high school, 19% were high school graduates, 32% had attended college or technical school, 25% had college degrees, and 14% had graduate degrees. Fifty-three percent were employed full time, 6% were employed part time, 15% were retired, and the rest were not employed. Household incomes varied—16% earned less than $20,000 per year, 25% earned between $20,001 and $50,000 per year, 27% earned between $50,001 and $100,000 per year, and 11% earned more than $100,000 per year.

**Procedure**

We obtained our sample using a multistage probability design that used random-digit dialing of telephone numbers selected from valid telephone exchanges in the United States. We oversampled areas with high proportions of African American, Asian American, and Latino residents.

Eligible respondents were adults aged 18 or older. We identified the household members eligible to be interviewed...
based on two questions: “How many adults aged 18 or older live in your household, including yourself?” and “How many of them are women/men?” We then randomly selected the household member to be the respondent by using a computer-generated selection method in which all eligible respondents in the household were equally considered. We made at least 15 attempts to complete an interview at every sampled telephone number. We scheduled calls over various days of the week and at different times of the day to maximize the chances of making a contact with respondents. The response rate was 54%.

**Measures**

**Vignette technique.**—We read respondents a multiple-segment factorial vignette describing a family in which an older person experienced a dilemma. The multiple-segment factorial vignette technique bridges two research paradigms by combining elements of experimental design and probability sampling (i.e., the factorial survey technique; Rossi & Nock, 1982) with the inductive, exploratory approach of qualitative research. The multiple-segment factorial vignette design thus enables researchers to draw conclusions about the effects of vignette dimensions on respondents’ beliefs about intergenerational assistance.

After each segment was read, we asked respondents questions about what a character in the vignette should do. Conditions in the vignettes were systematically varied in a manner similar to the factorial survey approach used by Rossi and Rossi (1990). We manipulated independent variables in the vignette stories and randomly assigned respondents to hear one of the versions of the vignette. In addition, the multiple-segment factorial vignette approach makes it possible to examine the effects of changes in contexts on beliefs and judgments because vignettes are presented in multiple segments in which new variables are added in each segment.

There were two segments to the vignette designed for this study. In both segments, respondents were asked, “Should the younger adult help the older adult?” and “How much should the younger adult help the older adult?” We combined these two questions to form a single construct about how much help should be given, with the choices being 1 = none at all, 2 = a little bit, 3 = a moderate amount, and 4 = a great deal. All respondents were then asked, “How obligated is the younger adult to help the older adult?” Response choices for this question were 1 = not at all obligated, 2 = somewhat obligated, 3 = moderately obligated, and 4 = highly obligated. Rather than use terms like “the younger adult,” we used characters’ names and relationships (e.g., “his stepfather”).

In Segment 1, the independent variables were relationship quality (good or poor), gender of the younger adult, and relationship to the younger adult of the older adult in need of assistance (i.e., mother, father, stepmother, stepfather). The dependent variable was help with ADLs.

Grant is a 68-year-old man who decides to get married again after 15 years of being a widower. He marries Martha, a widow his age that he has known for a year. Grant and Martha live near Lee, a 40-year-old man who is Grant’s oldest child. Lee and Martha are polite to each other, but they have never gotten along well. They have different values and beliefs about things and have little in common. After two years of marriage, Grant dies suddenly of a heart attack. After Grant’s death, Martha finds that she needs help fixing things around the house, running errands, and getting groceries. Should Lee help Martha do any of these tasks?

In Segment 2, acuity of the need for assistance was added as an independent variable. There were two conditions of this variable—being diagnosed as diabetic (high acuity) or being “a little run down” (low acuity). The task was helping with a health care regimen.

Just a few months after Grant’s death, Martha begins to feel tired frequently, and she is losing weight. The doctor diagnoses her as having diabetes. She will need to change her diet. She needs help to take daily insulin shots, to monitor her blood-sugar levels several times a day, and to help with chores. Should Lee help Martha with these tasks?

**Demographic questionnaire.**—At the end of the interview, we asked participants their age, gender, marital status, parental status, income, race, ethnicity, education, and religiosity. We also gathered information about family experiences related to helping or being helped.

**RESULTS**

We modeled cumulative logits by performing ordered logistic regression using the proportional odds models for each outcome variable, which were ordered data (McCallagh, 1980). To test the hypotheses, we examined both main effects and interactions for simple logistic models. Then we used a stepwise procedure to explore the possible effects of demographic characteristics. For the stepwise analyses we forced all main-effect predictor variables to be in the model, regardless of significance, as a way to statistically adjust for their effects on the response variables; we included interaction terms only if coefficients were significant at $p \leq .05$. A significance of $p \leq .01$ was required for a demographic variable to remain in the model. We used a stepwise procedure rather than including all demographic covariates in the statistical models because it was a more efficient way to explore whether respondent characteristics were related to their beliefs about intergenerational assistance. Using the stepwise procedure also saves space; it would have taken several pages of tables to present all of the non-significant demographic variables had we forced all of them into the model.

**Open-Ended Responses (Qualitative Data)**

Open-ended responses were participants’ explanations for the responses they gave about intergenerational responsibilities. Participants were encouraged to provide as many reasons for their responses as they wanted ($M = 1.92$ reasons per segment). Interviewers word-processed these responses verbatim and coded them using established analytic induction approaches. Coders developed initial codes based on the language used by participants. After the initial set of codes and their definitions and descriptions were developed, a second researcher coded the first 25% of the responses. When there were disagreements, coders determined final codes after discussion. Coders were blind to the variations of the vignette read to the participants. Coders combined the inductively developed codes into conceptually similar categories or families of codes using NVivo software (QSR International, Doncaster, Victoria, Australia). In this study there were 10 categories of codes,
with 81 total codes; the interrater agreement between coders was .79 (weighted kappa), which indicates a strong agreement between coders (Landis & Koch, 1977).

Segmen 1

How much should the adult child help the older adult with ADLs? — The only significant effect was the relationship to the younger adult of the older adult in need of assistance. Adult children were expected to help mothers and fathers more than stepmothers and stepfathers. There were no significant interaction effects.

The covariates of respondent age and ethnicity were significant (see Table 1). Younger adults were more likely than older adults to think a lot of help should be given. African Americans and Asian Americans thought more help should be given than did White Americans.

How obligated is the adult child to help the older adult with ADLs? — The relationship to the younger adult of the older adult in need of assistance was significant (Table 1). Obligations were greater to parents than to stepparents. There were no significant interaction effects.

The only significant covariates were respondents’ marital status and income. Divorced, married, and single respondents thought there was more obligation to help than did remarried individuals. Respondents with incomes greater than $100,000 per year thought the adult (step)child had more obligation to assist than did individuals with lower annual incomes.

Table 1. Results From Segment 1: How Much Should the Adult Child Help and How Obligated is the Adult Child to Help With ADLs?

<table>
<thead>
<tr>
<th>Variable</th>
<th>How much</th>
<th></th>
<th>How obligated</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Coefficient</td>
<td>OR</td>
<td>95% CI</td>
<td>Coefficient</td>
</tr>
<tr>
<td>Design variables</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mother</td>
<td>1.26†</td>
<td>3.53</td>
<td>2.47–5.06</td>
<td>1.78†</td>
</tr>
<tr>
<td>Father</td>
<td>1.16†</td>
<td>3.21</td>
<td>2.24–4.60</td>
<td>1.81†</td>
</tr>
<tr>
<td>Stepfather</td>
<td>−0.22</td>
<td>0.80</td>
<td>0.57–1.41</td>
<td>−0.004</td>
</tr>
<tr>
<td>Relationship quality</td>
<td>0.16</td>
<td>1.72</td>
<td>0.92–3.50</td>
<td>0.08</td>
</tr>
<tr>
<td>Participant Characteristics</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>African American</td>
<td>0.60***</td>
<td>1.83</td>
<td>1.30–2.58</td>
<td></td>
</tr>
<tr>
<td>Asian American</td>
<td>0.68</td>
<td>1.96</td>
<td>0.98–3.96</td>
<td></td>
</tr>
<tr>
<td>Latino, Hispanic</td>
<td>0.25</td>
<td>1.28</td>
<td>0.84–1.96</td>
<td></td>
</tr>
<tr>
<td>Other†‡</td>
<td>0.22***</td>
<td>1.25</td>
<td>0.71–2.19</td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td>−0.02**</td>
<td>0.99</td>
<td>0.97–0.99</td>
<td></td>
</tr>
<tr>
<td>Divorced</td>
<td>0.74**</td>
<td>2.10</td>
<td>1.33–3.28</td>
<td>0.59***</td>
</tr>
<tr>
<td>Married</td>
<td>0.60**</td>
<td>1.82</td>
<td>1.22–2.73</td>
<td>−0.44*</td>
</tr>
<tr>
<td>Single</td>
<td>0.99†</td>
<td>2.69</td>
<td>1.77–4.07</td>
<td>−0.68**</td>
</tr>
<tr>
<td>Widowed</td>
<td>0.16</td>
<td>1.17</td>
<td>0.65–2.09</td>
<td></td>
</tr>
<tr>
<td>Income</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>$30,000–$50,000</td>
<td>−0.59**</td>
<td>0.55</td>
<td>0.36–0.84</td>
<td></td>
</tr>
<tr>
<td>$50,001–$100,000</td>
<td>−0.44*</td>
<td>0.64</td>
<td>0.43–0.95</td>
<td></td>
</tr>
<tr>
<td>&gt; $100,000</td>
<td>−0.68**</td>
<td>0.51</td>
<td>0.34–0.76</td>
<td></td>
</tr>
</tbody>
</table>

†Reference group is stepmother.  
‡Reference group is poor relationship.  
§Reference group is White, non-Hispanic.  
¶This group contained people with multiple ethnic identities.  
†Reference group is remarried.  
§Reference group is $100,000.  
* p < .05; ** p < .01; *** p < .001; † p < .0001.

Rationale for beliefs about helping an older adult with ADLs.—The primary rationale for helping a mother or father with ADLs was because of an inherent family obligation to assist kin in need (41% of respondents said this for fathers, 44% for mothers). For instance, respondents made comments such as “She’s the daughter, and when the parents get older, the children are obligated to help them;” and “I think as a family member his obligation is to help.” In contrast, relatively few respondents thought that the newly acquired stepparent was kin to the adult stepchild and therefore should be helped because of a family obligation (15% for stepfathers, 17% for stepmothers). One respondent said, “I think even though the stepmother is not blood, it is still the stepson’s family to some extent.” In fact, almost as many respondents explicitly stated that the new step-parent was not a family member, and therefore there was no obligation to assist (16% for both stepfathers and stepmothers). For example, respondents said, “It’s not her real mom, and she doesn’t really need to help;” and “She is not highly obligated because they are not blood;” and “The stepdaughter is not obligated because [the stepmother] is not directly linked to her family.”
married to his dad and made him happy, the stepdaughter should try and help [the stepmother]."

Respondents also thought that adult children owed the parents a debt that must be repaid (i.e., reciprocity; 22% for fathers, 18% for mothers). Respondents made comments such as “When the son was a child the father took care of him, now that the father is older, the son has responsibility;” and “I think that your parents do so much for you, and when they get older you should take care of them. Parents take care of you growing up.” Reciprocity was seldom given as a justification for helping or not helping the stepparent (5% for stepfathers, 3% for stepmothers). Instead, a moral obligation to assist was mentioned more frequently as a reason for helping step-parents than parents (e.g., “I think we have a responsibility to all the elderly. I think that the stepson has an obligation to this elderly lady no matter it is stepmother.”).

For stepparent–stepchild relationships, the quality of the relationship was the most important factor influencing participants’ judgments about helping (48% of those who heard about a stepfather needing help and 39% of those who heard about a stepmother needing help gave this as a reason for helping or not helping). These respondents said, “If they have a good relationship, then she’s obligated to help as much as she can;” and “Since they don’t get along very well, Lee shouldn’t have to help too much.” Relationship quality was also important for parent–child ties (20% who heard about a father needing help and 28% who heard about a mother needing help gave this as a reason for helping or not helping), but it was less frequently mentioned with parents than with stepparents.

Respondents who heard about parents more often suggested alternative ways that the adult child could help than did respondents who heard about stepparents (e.g., “Hire someone for domestic help or something;” or “If the son isn’t capable of helping, then he could at least arrange for a handyman to come and do that, so it is not a worry or a cost for his mother.”).

Respondents who heard about stepparents more often mentioned with parents than with stepparents.

Table 2. Results From Segment 2: How Much Should the Adult Child Help and How Obligated is the Adult Child to Help With Health Care Tasks?

<table>
<thead>
<tr>
<th>Variable</th>
<th>Coefficient</th>
<th>OR</th>
<th>95% CI</th>
<th>Coefficient</th>
<th>OR</th>
<th>95% CI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Design variables</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mother*</td>
<td>1.18*</td>
<td>3.24</td>
<td>2.30–4.58</td>
<td>1.82*</td>
<td>6.14</td>
<td>4.32–8.74</td>
</tr>
<tr>
<td>Father*</td>
<td>1.22*</td>
<td>3.38</td>
<td>2.39–4.79</td>
<td>1.64*</td>
<td>5.14</td>
<td>3.63–7.28</td>
</tr>
<tr>
<td>Stepfather*</td>
<td>−0.01</td>
<td>0.98</td>
<td>0.71–1.39</td>
<td>−0.04</td>
<td>0.97</td>
<td>0.69–1.35</td>
</tr>
<tr>
<td>Relationship qualityb</td>
<td>0.46***</td>
<td>1.59</td>
<td>1.25–2.03</td>
<td>0.24</td>
<td>1.27</td>
<td>1.00–1.61</td>
</tr>
<tr>
<td>Acuity of needc</td>
<td>−0.34**</td>
<td>0.71</td>
<td>0.56–0.91</td>
<td>−0.21</td>
<td>0.82</td>
<td>0.64–1.0</td>
</tr>
<tr>
<td>Participant Characteristics</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>African Americand</td>
<td>0.88*</td>
<td>2.42</td>
<td>1.73–3.38</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asian Americand</td>
<td>0.59</td>
<td>1.80</td>
<td>0.92–3.51</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Latino, Hispanicd</td>
<td>0.85</td>
<td>2.33</td>
<td>1.53–3.56</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Othere,f</td>
<td>1.00***</td>
<td>2.71</td>
<td>1.53–4.80</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age</td>
<td>−0.01</td>
<td>0.99</td>
<td>0.98–0.99</td>
<td>−0.02*</td>
<td>0.99</td>
<td>0.98–0.99</td>
</tr>
</tbody>
</table>

*Reference group is stepmother.
*bReference group is poor relationship.
*cReference group is low acuity.
*dReference group is White, non-Hispanic.
*eThis group contained people with multiple ethnic identities.

*p < .05; **p < .01; ***p < .001; †p < .0001.

**How much should the adult child help the older adult with health care tasks?**—Relationship quality, acuity of need, and the relationship to the younger adult of the older adult in need of assistance were significantly related to respondents’ judgments about how much the adult child should help the older person with health care tasks (see Table 2). Respondents thought more help should be provided when relationships were good than when they were poor; they also thought that older adults who had a lower acuity of need (i.e., those who felt tired and run down) should be helped more than older adults who had a greater acuity of need (i.e., those who needed diabetes monitoring and treatment). Finally, respondents thought that parents should be helped more than stepparents.

The covariates of respondent age and ethnicity were significant (see Table 2). Younger adults were more likely than older adults to think a lot of help should be given. White Americans of European descent thought that the older adult should be helped less than Latinos and African Americans did.

**How obligated is the adult child to help the older adult with health care tasks?**—Relationship quality, acuity of need, and the relationship to the younger adult of the older adult in need of assistance were significantly related to respondents’ beliefs about how obligated the adult child was to help the older person with health care tasks (see Table 2). Respondents thought there was greater obligation to help when relationships were good than when they were poor, when older adults had lower acuity of need (i.e., tired and run down) than greater acuity of need...
(i.e., diabetes monitoring and treatment), and when the surviving adult was a parent rather than a stepparent. The only significant covariate was respondent age (see Table 2). Younger adults thought that the adult child was more obligated to assist the older person than did older adults.

**Rationale for beliefs about helping an older adult with health care tasks.**—The primary reason to help parents was because of a family obligation to assist kin (36% for fathers, 37% for mothers). For example, respondents said, “We are to take care of our parents. That’s his mother [and] he’s supposed to help her;” and “You should just take care of your parents.” In contrast, fewer people (6% for stepfathers, 12% for stepmothers) stated that stepparents were family and should be helped for that reason (e.g., “Because she [the stepmother] became part of his family when she married his father;” “This is his family, regardless that it’s not his immediate family, it’s his stepfather, so it’s his responsibility to a certain degree.”). Slightly more people (12% overall) specifically said that there was no longer any familial obligation to a stepparent once the parent had passed away: “I think the [step]son would stay away . . . His mother was the glue between him and his stepfather before she died, and without the connection, why would the [step]son want to help? I don’t think marriage entitles anyone to anything.” Moreover, the rationale that the stepparent should be helped as a way to fulfill responsibilities to the deceased parent was much less frequently proffered than in the first segment (8% said this in Segment 2 vs 22% in Segment 1). Additionally, if the stepparent had kin that could help, then these kin were expected to do so (e.g., “Stepmother probably has family of her own that could help in this situation.”).

Respondents also suggested a number of ways that older parents (40%) and stepparents (37%) could be helped that did not involve the adult (step)child assisting with the health care tasks. The primary suggestion was to have the older adult hire a nurse to help with these tasks. One respondent said, “The [step]son shouldn’t necessarily help by physically monitoring and doing all the things. He can help his stepfather by looking elsewhere, such as in-home nursing care.” Suggestions for alternative ways that the older adult could meet the (step)parent’s needs were mentioned a lot more frequently in Segment 2 than in Segment 1 for both parents and stepparents.

Moreover, more respondents who heard about a surviving parent (35%) than a stepparent (27%) said they were concerned about the older adult’s needs (e.g., “Because the father was diagnosed with diabetes, and you have to take a lot of precautions, he [the son] has to be there to help him;” and “Lee’s mom is physically incapable of doing things and being a son he should help.”). In contrast, reciprocity as a rationale for helping parents was mentioned by fewer respondents in Segment 2 than in Segment 1. Perhaps as the demands of the tasks being asked of the younger adults increased, respondents believed that paying back a debt to the parents was less relevant.

**DISCUSSION**

**Responsibilities to Stepparents**

The first hypothesis was supported. Adults were seen as less obligated to assist stepparents acquired later in life than they were to help older parents. Norms of filial obligations to parents and beliefs about the need to repay parents for past help were common rationale for helping both parents that were almost nonexistent and stepparents acquired later in life. The invisible bonds of loyalty that connect parents and children across the life course apparently do not apply to relatively recent stepparent–stepchild ties. The motives for helping parents were not the same as the motives to help stepparents acquired later in life. In fact, there were few motivations to assist a new stepparent other than as a way to fulfill filial obligations to the parent (i.e., spouse of the stepparent). Responsibilities to assist older stepparents in newly formed stepparent–stepchild relationships also were not characterized by sociological ambivalence (Luescher & Pillemer, 1998), perhaps because they were not seen as kin ties.

Longer term step-relationships are often defined as kinship ties, however; when they are defined in this way, then family obligation norms, beliefs about reciprocity between generations, relationship quality, and other factors are as relevant for step-relationships as they are for kinship ties (Ganong & Coleman, 1999). It may be that long-term step-relationships are characterized by sociological ambivalence, just as parent–child relationships may be. It is not clear from this study, nor can it be determined from earlier research, how long the relationship between older stepparents and adult stepchildren has to exist or how many previous intergenerational transfers between stepparents and stepchildren have to be made before step-relationships are seen as kinship ties. We can conclude, however, that kinship status is not automatically assigned to stepparents and stepchildren; older stepparents have to somehow earn the entitlements and obligations that characterize parent–child relationships.

These findings also suggest that stepfamily relationships are still incompletely institutionalized (Cherlin, 1978). That is, although respondents clearly did not see newly formed step-kin as being bound by family norms, this did not mean they had a clear sense of what the nature of the stepfamily relationships were. For example, respondents’ expectations regarding intergenerational assistance to stepparents were more variable than were beliefs about intergenerational assistance between adult children and parents.

**Relationship Quality and Perceived Obligations**

The second hypothesis, that relationship quality would affect obligations to stepparents but not parents, was not supported by the quantitative data. Instead, relationship quality was important in attributing responsibilities to help both parents and stepparents. This finding is consistent with some earlier research that reported that relationship quality was an important factor in making judgments about helping any older person (Ganong & Coleman, 1998; Ganong et al., 1998).

The open-ended rationale provided by respondents lent some support for the second hypothesis, however. Many more individuals thought that relationship quality was a principal reason for helping or not helping a stepmother (37% in Segment 1; 19% in Segment 2) or stepfather (48%; 24%) than thought it was critical as a rationale for helping or not helping a mother (28%; 10%) or father (20%; 8%). These qualitative data suggest that stepparents with a close or positive relationship with newly acquired adult stepchildren could count on...
somewhat more assistance than stepparents without a close step-relationship, and that relationship quality may be more relevant for deciding how much to help stepparents than for making judgments about assisting parents. Perhaps the key conclusion, however, is that relationship closeness is a factor for deciding about aid for both parents and stepparents.

**Acuity of Need and Obligations**

The third hypothesis was not supported. In fact, the findings supported the opposite of what was predicted. Respondents perceived a greater obligation to help an older person with a lower, rather than higher, acuity of need. This was true regardless of whether the older person was a parent or a stepparent.

Ganong and colleagues (1998) concluded that greater acuity was related to more perceived obligations to provide financial assistance and other types of tangible support provided intergenerationally. If older individuals in need had other resources or other sources of help, then perceived responsibilities of younger family members were lower than if the older adults lacked such resources. In contrast, and in line with the results of the present investigation, Finch and Mason (1993) and Ganong and Coleman (1998) found that people were more likely to think that older family members should be helped with smaller tasks than with more challenging tasks. The open-ended findings of the present study indicate that when the older adult needed help with a more serious health condition, respondents saw these demands as being beyond the skills or resources of younger adults; respondents instead suggested that a variety of non-family help be employed (e.g., visiting nurses, social services programs, assisted living facilities). In contrast, when the older adult needed help with less serious health needs, respondents offered a variety of suggestions about how the younger person might assist (although it should be noted that hiring nurses and other non-family assistance was also suggested in this context, but to a lesser extent). These findings are congruent with Litwak’s task specificity theory (Litwak et al., 1990), in which it is proposed that groups (such as kinship systems) can optimally manage only those tasks that match their structures. Tasks related to high-acuity needs may be beyond the capabilities of the family, and this was borne out by the respondents’ perceptions as reflected in both the quantitative and qualitative data. More research is needed to determine under what conditions acuity predicts greater or lower perceived obligations.

**Respondent Characteristics and Obligations**

Few respondent characteristics were significantly related to obligation beliefs in logistic regression models, although age and ethnicity were related to obligation beliefs more than once. In general, age was inversely related to beliefs about responsibility to help. Younger people may think more idealistically about intergenerational transfers than older people do. They may be cognizant of what they owe the older generations and may have had less time to pay back their perceived debts than middle-aged and older adults have had. As people age they are more likely to be recipients of help from either younger kin or a provider; consequently, their reactions to the vignettes may reflect personal experiences that reduced perceived obligations. However, reported personal experiences with intergenerational helping were not related to obligation beliefs in any of the analyses. It may be that a norm of independence among older adults is contributing to these differences. More research is needed to examine age differences in obligation beliefs.

The pattern of responses across racial and ethnic groups was somewhat mixed, but Whites of European descent generally thought that obligations to assist parents and stepparents were less binding than did people of color. White Americans are generally more individualistic in orientation than African Americans, Latinos, and Asian Americans, who descend from and are part of cultural traditions that are more familistic and collectivistic (Radina, 2003). This means that African Americans, Latinos, and Asian Americans more than Whites would be expected to think that older family members should be helped because of their adherence to familistic norms. That is consistent with the findings of this study.

In general, few demographic characteristics of respondents were related to their obligation beliefs. Gender, parental status, level of education, religiosity, and previous experience with intergenerational transfers were never significantly related, and household income and marital status were each significant in only one regression model. This suggests that these beliefs are widespread and not so contextual that they cannot be generalized.

**Reasons for Helping Older Kin After Remarriage**

People clearly attribute different motives to helping parents than to helping stepparents. Familial obligation norms and the need to repay parents were the primary reasons for assisting parents. In addition, relationship quality and the magnitude of the older parent’s needs were important conditions that influenced the amount of assistance people thought the parent should receive. In contrast, helping a new stepparent was largely conditional, with relationship quality and the older stepparent’s needs as major considerations. Familial obligations, mostly to the parent rather than to the stepparent, were the only motivation to assist a newly acquired stepparent.

**Summary**

Stepparents acquired later in life generally were not seen as family members, and thus norms of family obligations and bonds of entitlements did not apply to them. Later life remarriage did not affect the amount of assistance perceived to be appropriate for parents. However, shared kinship is not enough for the assignment of unbounded entitlements and obligations to parents; instead, for the majority of people, obligations to assist older parents are conditional. The findings from this study lend some support to the ambivalence model of intergenerational relationships, in that for most respondents the responsibilities to older parents were limited or shaped by such influences as how well they got along and how many resources each adult had. Few respondents attributed an absolute obligation to the adult child to help the parent, and few thought that a great deal help should be given. It seems clear from this study that intergenerational relationships are characterized by conditional entitlements and bonds of limited loyalties. Stepparents have to earn their way into these conditional bonds by building a history of resource exchanges and positive emotional ties with stepchildren. Future research should
explore the conditions under which this occurs in step-relationships.

ACKNOWLEDGMENTS
This study was supported by a grant from the National Institute on Aging (AG17967).

Address correspondence to Dr. Lawrence Ganong, 409 Gentry Hall, University of Missouri, Columbia, MO 65211. E-mail: ganongl@missouri.edu

REFERENCES

Received December 9, 2004
Accepted June 28, 2005
Decision Editor: Charles F. Longino, Jr., PhD