

2019

Intergenerational Caregiver Loss and Successful Aging Opportunity Disruption of Bulgarian Elderly

Daniel Georg Habermann
Walden University

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Walden University

College of Social and Behavioral Sciences

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Daniel Habermann

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Dr. Dorothy Scotten, Committee Member, Social Work and Human Services Faculty
Dr. Cynthia Davis, University Reviewer, Social Work and Human Services Faculty

Chief Academic Officer
Eric Riedel, Ph.D.

Walden University
2019

Abstract

Intergenerational Caregiver Loss and Successful Aging Opportunity Disruption of
Bulgarian Elderly

by

Daniel Habermann

MSW, University of Alaska Anchorage, 2015

BS, North Dakota State University, 1992

Project Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Social Work

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Abstract

Identified by European research as an aging crisis, vulnerabilities in the rural Bulgarian elderly population such as intergenerational caregiver loss, are sociohistorical consequences and barriers to successful aging. This transcultural study investigated the aging crisis in rural Bulgaria to create a contextual definition of successful aging and to address successful aging and the identification of challenges and barriers faced by social workers and elders to support successful aging. Guided by continuity theory in aging and contextualized by overarching ecological systems theory, the research questions examined Bulgarian social workers' perceptions and expectations of successful aging and barriers to it. A collaborative action research design was commissioned with a purposeful sample of an 8-member participant group drawn from multileveled Bulgarian social workers affiliated with the rural elderly population. Data were distilled by a thematic analysis into perceptions, expectations, and barriers of successful aging, which were validated by triangulation through translation and repetitive member checking processes. The findings revealed no universal threshold of successful aging achievement, but because expectations were unmet due to systemic barriers successful aging is not occurring in Bulgaria. The study results might bring about positive change by unifying Bulgarian multilevel social work practice to restore successful aging opportunity for the rural Bulgarian population by actions that systemically respond to the identified barriers.

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Section 1: Foundation of the Study and Literature Review

The inspiration for this project originated from my firsthand experiences with the rural elderly in Bulgaria and was further motivated by a local Bulgarian friend with the knowledge that I was pursuing my Doctor of Social Work (DSW) who suggested that I do something about the severe aging crisis I encountered. Thus, I conceived this project like an investigative tool to comprehensively understand the aging crisis phenomenon and to formulate positive, effective, and sustainable actions to help the rural Bulgarian elderly live a better life in old age.

Affecting Bulgaria are the recent systemic issues of overall population loss, economic collapse, and an aging, but a growing population segment, which has negatively intersected upon individuals who have entered old age, creating barriers to the developmental process (Central Intelligence Agency [CIA], 2014; Hajek & König, 2016; Kruse & Schmitt, 2012). The ability to overcome barriers that allow a satisfactory developmental process of old age aging to occur is more definitively and universally termed as successful aging (Singh, 2015). Successful aging, in the framework of staged human development, is a term definitionally relative and contextually shaped by culture, diversity, and experiences as the actualization of an anticipated state, or acceptance of the collective dimensions of old age (Hajek & König, 2016). Preexistent to the relatively new systemic issues mentioned, population attributes such as education, gender, socioeconomic class, political affiliation or influence, geographic location, shared sociohistorical events, race, religion, culture, and ethnicity have intersected to form hardened barriers that compoundly inhibit the opportunity to age successfully, and are

associated with long standing local and national level social work practice (Hokenstad & Roberts, 2011). Research has indicated that these combined emergent and sociohistorical systemic factors have created direct and indirect barriers, especially to elders in Bulgaria and other Eastern European countries, which have overwhelmed society's ability to support successful aging (Kulcsár & Brădăţan, 2014). One such direct component in these countries that has become a barrier to successful aging is the structural disruption of the family system, (i.e., the loss of intergenerational caregiving) a mutually beneficent transactional component that fostered support, stability, security, and continuity identified as a primary determinant of successful aging (Hajek & König, 2016). Indirectly impactful, community infrastructure was found to be a vital component of successful aging; primarily to provide services essential to aging elders (Kulcsár & Brădăţan, 2014). Besides the physical aspects of wellbeing, successful aging incorporates and considers dimensions of the whole being: intellectual, spiritual, emotional, and social being (Fernandez-Ballesteros et al., 2010; Goldberg & Beitz, 2006). Imbalance or deficiency in any of these dimensions can inhibit successful aging opportunity, and manifest as psychological or physiological symptomologies that further compromise the individual, meaning their quality of life and lifespan (American Psychological Association [APA], 2013; Singh, 2015).

In November 1990, Bulgaria ceased to be a Communist-ruled nation after nearly 50 years and became a member state of the European Union (EU) beginning in January 2007 (Pitheckoff, 2017). The period preceding EU accession created instability and unrest that was incompatible with Communist ideology, thus creating a rift between

generations motivating a desire for many of the younger generation to seek a better life elsewhere (Kulcsár & Brădăţan, 2014). The EU framework provided the opportunity for many working age Bulgarians to emigrate among other EU member states legally, a mass out migration began and continued to be responsible for more than 10% of the direct population loss (“Mitigating the Economic Impact,” 2013). Bulgarian children born and residing outside of the country, along with a very low internal birth rate, has effectively created a burgeoning elder population segment. This is demographically a unique phenomenon as the size and overall wealth of an aging population segment of most developed countries grows gradually and parallel, not abruptly and without adequate equity and resources (“Mitigating the Economic Impact,” 2013; Pitheckoff, 2017).

In a response attempted to mitigate the problem of socially disruptive out migration from Bulgaria, the EU held discussions to create proposals to curb the outflow, but the economics driven politics of other member states who value and enjoy cheaper Bulgarian laborers stymied implementations of such programs (Sodexo Institute for Quality of Daily Life, 2011). Illustrative by this approach that recognized the population outflow as a singular issue rather than a systemic problem, the corresponding actions by the EU were driven by policy change and other overarching initiatives, described by O'Connor (2005) as a top down approach with the aim to create the broadest positive impact. Instead of stemming the population outflow, another aspect of the problem, support for the Bulgarian elders, was targeted by broad EU-backed interventions that created localized programs such as food and mobility technology assistance to offset negative consequences of intergenerational caregiving loss, but were logistically difficult

to access by elders outside of the service areas because they existed only in the largest cities and high density areas (World Bank, 2013). O'Connor (2005) described these poor or limited outcomes as pitfalls of broad interventions because they were not responsive or well matched to the systemic elements of the problem. As a result of the poor and limited outcomes of these interventions that focused solely upon a singular element of a systemic problem, Bulgarian elders, especially those who reside in rural areas such as the Gabrovo region, are becoming more isolated, receiving less care, and being impacted by different types of poverties that threaten their opportunity to age successfully (Kulcsár & Brădăţan, 2014; Pitheckoff, 2017; Shishmanova, 2010).

The inhibition of successful aging is an issue that negatively impacts elders on all arrays of human dimension, and in many cases, creates or expounds vulnerabilities stereotypic to elders (Laceulle, 2017). Depression and depressive symptoms, including somatic responses, are common concerns that are often undiagnosed, misdiagnosed, or untreated due to the lack of mental health services, isolation, lack of transportation or communication, or poorly cross-trained primary care providers (Hokenstad & Roberts, 2011). A segment of this population most susceptible are women in the rural areas since many outlive their spouses or are burdened with difficult caretaking tasks, have smaller pensions, are physically unable to perform vital household tasks, and lack the means of independent transportation (Pitheckoff, 2017). Further compounding these components of marginalization are the dependencies on fringe type services that capitalize on the vacancies of local small businesses by overcharging and offering substandard products and services (Kulcsár & Brădăţan, 2014).

Intertwined with the needs of successful aging are expectations of successful aging (Fernandez-Ballesteros et al., 2010). These expectations are contextual and shaped by historically embedded cultural norms, religion, and wealth (Tam, 2014). For the current Bulgarian elderly population who was raised in a Communist society, their expectations were cemented by socialist ideologies, such as equality and community responsibility; this concept most markedly demonstrated through the intergenerational caregiving of their parents, and the supportive role of the government and community infrastructure (Kulcsár & Brădăţan, 2014; Pitheckoff, 2017). During this societal era, intergenerational caregiving was a historical component of the family that provided a continuum of reciprocal support between generations through shared tasks and resources (see Pinazo-Hernandis & Tompkins, 2010).

The clinical social work practice issue considered by this action research project was to understand how Bulgarian social workers viewed successful aging and the barriers to its achievement. To achieve this objective, facilitative interactions with regional social workers experienced with the elderly population yielded an in depth understanding of successful aging and its barriers, and through the lens constructed by the various social work roles, levels of social work intervention common within literature were distinguished and aligned. Jones (2005) described this array of social work interventions as micro-, mezzo-, and macrolevels of interaction, which corresponded in alignment to the main components of ecological systems theory (EST); a theoretical framework developed by Bronfenbrenner (1986) that helped to explain human development and its systemic problems in the context of environment by the identification and categorization

of the level or sphere of influence all components and systems that impacted the individual. Visualized as a spherical model, Bronfenbrenner defined the three major components as follows: (a) microsystem components represent the innermost and direct environment that the individual interacts with, such as family, friends, church, doctors, and community; (b) mezzosystem is the influence of two or more microsystem components upon the individual, such as family and community, or friends and church; and (c) macrosystem is the overarching ideology and culture that shapes human character through its indirect mechanisms of influence upon direct components (e.g., race, socioeconomic status, and sociohistorical events) and therefore, their properties of influence are not as easily discerned by the individual. Examples of these three system levels of influence, micro-, mezzo-, and macrolevel, respectively, found in current Bulgarian society and pertinent to the scope of this study are as follows: (a) the relationship between Bulgarian elders and their absent intergenerational caregivers has a direct influence on the ability to age successfully (Hajek & König, 2016), (b) the connection of community and population outflow is associated with infrastructure strain that has curtailed necessary services, such as medical or nutritious food options (Kulcsár, & Brădăţan, 2014), and (c) shared sociohistorical events and paradigms, such as the ideology of Communism that strongly promoted collectivity, has shaped the expectations of successful aging for the current elder population (Kulcsár & Brădăţan, 2014; Pitheckoff, 2017)

Jones (2005) asserted that successful outcome of social work interventions is dependent upon the full understanding of the problem and population in context, and

equally the interceding social work system itself. About social work practice in Bulgaria, the microlevel spectrum of interaction is directly connected with the client mostly by the presence of case managers who assess acute needs and provide access to resources (Dimitrova, 2017). Whereas the macrolevel of interaction, such as food assistance program policy and management, is considered broader and more indirect because it does not have individually shaped responses and typically is staffed by professionals who do not identify as social workers or have knowledge of the associated values and ethics (Georgiev, 2017). Exploration of how Bulgarian social workers' multileveled interventions responded to identified challenges to successful aging provided the components necessary to build a construct that comprehensively defined successful aging in context and illuminated the individual pathways of the collective response to the problem by social worker participants. Demonstrative of the need to unravel the complex and intertwined nature of the Bulgarian social work system is the example comparison between direct care and policy making social workers. The intervention level of direct care social workers is directed by policy, whereas the engagement level of intervention by policy making social workers is justified by output and outcome rather than the specific needs of the beneficiaries.

Furthermore, the comprehensive portrait also contained the full gamut of human dimensions contributory to successful aging. The tangibility of each dimension was dependent upon social worker roles and responsibilities reflective of intervention level. Applicable to the previous example, the importance of a dimension, such as spirituality or connection to a religious community, that may not have been considered an essential

need for successful aging to occur was an important and sought after element of the study aligned with the *Code of Ethics* by the National Association of Social Workers [NASW] (2017). The alignment resulted in an understanding that comprehensively and multidimensionally engaged the topical issue - a responsive holistic perspective that fully informed the stakeholders and provided a pathway for positive social change through a framework of multidimensional interventions shaped by core social work values (see Ashcroft, Van Katwyk, & Hogarth, 2017). Positive social change is the ethically responsible restorative function to achieve societal equilibrium and to challenge social injustice while doing no harm, and maintaining respect for individuality, diversity, and determination of the client (NASW, 2017). Therefore, a holistic approach to the social problem required more than a singular response to symptomology (Behrman & Tebb, 2009); it required an analytical examination of the client (problem) in situ. This directed the consideration of evidence-based interventions of various types, levels, and locations to mitigate the problem with results that contributed to overall positive social change, but most importantly a protective advocacy for the client in the environment (see NASW, 2017; Thyer, 2012).

Paramount to good social work as described above, interventions at multiple spheres of influence were necessary to mitigate the social problem and promote positive social change (Jones, 2005). Therefore, my understanding was needed of how each micro-, mezzo-, and macrolevel achieved its objective towards the collaborative goal. The following descriptions by Shelden (2015) equate levels with lenses: macrolevel social work interacts at a systemic level, usually through policy change; mezzolevel

social work interacts with components and systems that influence the client; and microlevel social work interacts directly with the client or local environment.

Application of this rationale to this project produced the following descriptions for each level: (a) the examination of local and national Bulgarian, and EU laws that pertain to elders identified macrolevel social work practice challenges, (b) the exploration of available social support and community programs for the elderly listed the mezzolevel social work practice challenges, and (c) microlevel social work challenges to successful aging, such as individual supportive services specific to the elderly, were scrutinized for availability, accessibility, and outcome effectiveness.

Contrary to the majority of programs that focus on the physical dimension as a pathway to successful aging, research by Torres (2003) found that multidimensional elements and respective support were needed for successful aging to occur, in which the need was manifested more visibly in populations like Bulgaria: societies multidimensionally compromised through losses such as community, ideology, family, and religion. Therefore, it was vital that the in depth understanding of how Bulgarian social workers viewed successful aging and the respective barriers to achievement was collectively derived by this research through a framework that echoed the multidimensions of the systemic problem by promoting equal ownership and participation of all social workers who interact with Bulgarian elders (see NASW, 2017; Stringer, 2013). This framework guided by the spirit of social work values is the hallmark of action research (Stringer, 2013), and put together creates a design that produces accurate, useful, purposeful, meaningful, and contextualized findings that

reflect the voice of the Bulgarian elders, and through informed actions becomes positive social change (see McNiff, 2016).

There are four major sections and an abstract contained in this research study. The first section, foundation of the study and literature review, introduces the social problem and how the research study addressed the problem: background/topic introduction, problem statement, purpose statement, research questions, nature of the project, significance of the study, theoretical/conceptual framework, values and ethics, and a review of the professional and academic literature. The second section, research design and data collection, recaps the problem and presents a detailed research plan implemented to recruit participants, and collect and analyze purposeful data using ethical procedures: research design, methodological components of data collection, data analysis, and summary.

Problem Statement

The systemic social work practice problem required an understanding of how Bulgarian social workers view successful aging and the identification of challenges and barriers faced by social workers and elders to support successful aging. Validating the abundance of successful aging literature, more than 600 research articles were identified in a recent meta-analysis by Kim and Park (2017) that analyzed components of aging for correlates supportive of a unified and singular operationalization of the term successful aging. Even though Kim and Park only included research conducted in the English language among other criteria that largely represented Western society, a consensus aimed at establishing a definition of successful aging was achieved. This finding bolsters

and exceeds the claim by Tam (2014) that, due to the highly contextual nature reflective of societal and cultural norms, the definition of successful aging cannot be templated or effectively applied to other populations than the one on which it was generated. This rationale, coupled with the extreme scarcity of useful research regarding successful aging in Bulgaria, created a gap in literature that is essentially the voice of the Bulgarian elder population. Because of its methodological characteristic of developing a collaborative voice specific to the problem and population, action research was a prime candidate to fill this gap by presenting a contextual definition of successful aging (see Stringer, 2013). In addition to providing rich data to inform successful aging literature and helping to define successful aging in similar populations, specifically those who have emerged from a Communist lifestyle, this action research project, which importantly included the participatory actions of its methodological components as agents of transformational change (see Stringer, 2013), may influentially improve Bulgarian social work practice in general through its application to other social issues. Compounding the already definitionally and the systemically complex phenomenon of successful aging is the interwoven component of unmitigated intergenerational caregiving loss that is unique to post-Communist regions such as neighboring Romania (Kulcsár & Brădăţan, 2014). In the context of Communist society, intergenerational caregiving was more than a relationship, it was a mutually beneficent transactional component of family structure that provided multidimensional support, notably to successful aging, in addition to being a vehicle for financial, cultural, and religious transfer; this construct exemplified as a desired developmental process in old age termed as generativity (Khan, 2014).

Supplementing the strong intersectionality of intergenerational caregiver loss that supported my decision to conduct research in a rural area, Kulcsár and Brădăţan (2014) found that elders who lived in rural areas faced even more challenges to successful aging that increased the likelihood of vulnerability. These factors of compounding intersectionalities supported the selection of regional social workers from the remote region of Gabrovo, Bulgaria as an action research participant group since they interact with a population that represents the most at risk. Although the participants of the group work at different levels of intervention, they all have knowledge and experience with the elderly population. The structured group platform, an email interview exchange, was facilitated as a collaborative learning activity that specifically explored successful aging perspectives and associated challenges faced in multileveled social work practice; a modern modality of a classic action research design where the researcher is also a participant and becomes a collaborative partner in the transformational change processes (see Kaner, 2014; Nielsen & Lyhne, 2016; Wach, 2015).

The reviewed research literature on successful aging available in the English language augmented components that are successful aging determinants contextually shaped by society, in this case a Western perspective, which are the importance of independence, comfort, financial security, and a strong focus on health, quality of life, and longevity (Fernandez-Ballesteros et al., 2010). The meta-analysis conducted by Kim and Park (2017) produced the following correlates aligned with a Western perspective: (a) physical and mental wellbeing, (b) activity, and (c) psychological adaptability. The research findings by Khan (2014) were in agreement but further suggested these

components are what replaced the multidimensional supported afforded by intergenerational caregiving. Because successful aging cannot be universally measured or transculturally applied accurately, Kim and Park (2017) and Iecovich (2014) agreed that the definition of successful aging was an expectation of old age; a relative construct shaped by multiple factors that acted upon each human dimension. Therefore, it was imperative that successful aging is understood in a person in environment manner (NASW, 2017), especially when cultures foreign to Western thinking are considered (Tam, 2014). However, common characteristics of aging elders established by research and consensus are the negative consequences when successful aging expectations and adaptability were not achieved (Shenk & Sokolovsky, 2001). Dependent on the contextual understanding of successful aging within a population segment, failed expectations or the inability to adapt were barriers identified that halted the normal developmental process of old age (Khan, 2014). Goldberg and Beitz (2006) highlighted increased physical ailments, psychological distress, such as anxiety, depression, and stress, poor diet, less activity, decreased quality of life, and shortened lifespan as negative multidimensional consequences associated when disruptions within the developmental process of aging occurred.

Purpose Statement

The purpose of this action research study was to gain an in depth understanding of how Bulgarian social workers viewed successful aging and to identify challenges and barriers in social work practice delivery. In addition to the social workers' views, the facilitative process also provided a contextual overlay to existing relevant literature of

what successful aging in Bulgaria entails. Increased understanding gained through this information exchange and reflection process progressively guided and shape consensus integrative to the rendering of future discussion, research, and action.

Research suggests that successful aging is an expectation beyond the basic elements needed for survival, but formed instead from contributing variables such as culture, religion, wealth, and other diversifying factors (Tam, 2014). Therefore, each society, at a minimum level, has shared expectations of successful aging. For example, it would be incongruent to apply successful aging expectations of a wealthy Caucasian American to a nomadic tribe member in Finland. Understanding successful aging and associated barriers through the lens of social workers who provide multilevel interventions are responsive to the specific needs and expectations of the population. Information gained through this study enhanced the understanding of successful aging by providing context to existing literature, which was especially beneficent to other populations. For example, social workers in America who have elderly Bulgarian clients may benefit from this study by shaping their practice, resulting in a better outcome.

Less attention in scholarly literature has been given to the concept of historical intergenerational caregiving due to the shift of independent living among elders and offspring alike, especially in Western societies where wealth has replaced the needs afforded by intergenerational lifestyle (Hajek & König, 2016). However, recent research that defined intergenerational caregiving differently still recognized the multidimensional benefits to the elder. The longitudinal study by Sakurai et al. (2016) examined intergenerational relationships within a nursing home environment between elementary

students and elders demonstrated that the one way (child to elder) transactional process of caring had a positive and long lasting multidimensional impact on the elders. Therefore, a gap in recent literature formed by a redefinition of intergenerational caregiving chronicles how modern day families in countries, such as Bulgaria, consider intergenerational caregiving as a necessary element of the family continuum. My action research study wove together the interdependencies of successful aging and intergenerational caregiving, informing literature how this unsupported loss created, in one generation, multiple vulnerabilities that inhibit successful aging opportunity.

The processes and findings of this action research study served multiple purposes. First, the discovery of Bulgarian social work practice improvement strategies occurred. Second, my future practice ambitions were solidly informed and shaped by the action research processes and outcome. The mission and operational details for my envisioned rural community elder care collective were further shaped and refined to be well matched to the population and its unique needs. Third, research findings presented an accurate reflection of the problem and a collective voice for Bulgarian elders that unified their desire for change. In addition to shaping Bulgarian social work practice, the findings may bolster initiatives to provide relief to the elders through the involvement of entities with scopes outside of social work, such as EU funding directive and appropriation committees, or nongovernmental organizations with compatible missions. Fourth, rich data produced from the research contextually informs scholarly literature and assists theory generation related to successful aging. A better-informed literature base may contribute to providing clarity to the ambiguous definition of successful aging by

synthesizing the diversity of other cultures and their respective elder subpopulations into the preexistent knowledge base. Fifth, future researchers may expand research to address other aspects important to successful aging. Transcultural research, such as this project achieved, may add or renumber the list of human dimensions or external factors influential to successful aging, which may lead research in other paths that may have more beneficence to the studied population, such as the uniqueness found in the post-Communist Bulgarian elderly population.

Research Questions

The two interrelated research questions directing the elements of this study are, “What are Bulgarian social workers’ perceptions and expectations related to successful aging for Bulgarian elders?” and “What are the barriers identified by Bulgarian social workers that inhibit successful aging for Bulgarian elders?”. The analytical processes that I used to synthesize the data collected with and against relative literature validated common themes and illuminated aspects unique to the population presented by this research project. As a result, I formulated specific evidence-based solutions and strengthened scholarly social work literature through the diversity of its contribution.

Definition of Key Concepts

Unlike experimental research that operationally defines variables of key concept through method or findings to provide concrete meaning, action researchers seek to explore, contextualize, and create an understanding that is well matched to the population and problem aimed to develop effective solutions reflective of the current reality in situ (Irvine et al., 2007; Stringer, 2013). Applying the best practices approach to bolster

translation validity, Slife, Wright, and Yanchar (2016) suggested three tasks necessary to the constructs of operational definitions: (a) clarification, (b) specification, and (c) justification. Since the key concepts listed below have transcultural specific meanings requiring clarification and are the essence of what was being explored for better understanding to inform the definitions specific to the research, it is reasonable to conceptually define the key concepts of this study through the syntheses of an exhaustive literature search to what was studied.

Bulgarian Social Worker: A professional whose direct or indirect interactions with the rural Bulgarian elder population reflect the multileveled roles and responsibilities of a professional social worker as described by the NASW (2017).

Intergenerational Caregiving: A sociohistorical embedded structural component of the Bulgarian family, which is a construct of continuum that enables effective transfer of reciprocal and mutually beneficent transactions between generations that are multidimensional, such as physical and emotional needs, wealth, safety, religion, tradition, culture, and knowledge (Iecovich, 2014; Khan, 2014; Lewis, 2010).

Successful Aging: A positive developmental process of old age that is the actualization or successful adaptation to collective multidimensional expectations of life in old age, which is contextually framed and shaped by culture, diversity, religion, tradition, and sociohistorical experiences (Hajek & König, 2016; Singh, 2015). Interdependent upon intergenerational caregiving expectations as perceived by the typical Bulgarian elder, successful aging is essentially the product of the transactions and transfers between generations such as physical and mental health support, mobility,

happiness, lack of poverty, security, safety, supportive adaptations to negative circumstance, and the fulfilment of existential questions (Hajek & König, 2016; Laccelle, 2017).

Nature of the Doctoral Project

An exploratory qualitative research design was used to answer the research questions inductively. Insight and understanding specific to the problem and population were obtained by a nonstatistical means using a small sample size. Imperative to this research project success were the inclusion and participation of those relevant to the problem; the participants identified as social workers whose practice scope involved Bulgarian elders. My role in this research project was a researcher as a facilitator and colearner with the participant social workers. After shaping the preliminary email interview protocol based on available literature, the challenges of Bulgarian social work practice in mitigating barriers to successful aging were collectively explored. The initial information gathered yielded a twofold purpose. First, it shaped and refined the subsequent email interview exchange protocol. Second, it provided a contextual picture of what successful aging expectations of Bulgarian elders are through a Bulgarian social worker perspective. The email interview exchange of information facilitated comparative analysis and reflection of the participants' responses against their input, especially for social workers intervening at different system levels, and ultimately a mechanism for consensus (see Wach, 2015). The colearning aspect of action research allowed free exchange of information that stimulated creativity in developing problem solving strategies that concentrated the focus from all system levels (see Stringer, 2013).

Furthermore, the solutions unified by action research participants have increased merit and potential for instigating change in systems outside of their scope. Using this philosophy, the employment of Bulgarian social workers as action research participants was rationalized to deliver a unified and professional voice regarding the successful aging crisis to overarching decision making entities, such as the EU.

This project applied action research methodology to acquire an in depth understanding of how Bulgarian social workers viewed successful aging and associated multilevel systemic challenges that create barriers for the elderly population. Action research is a facilitative process that enjoins stakeholders and the researcher to fully examine a problem from many perspectives (Stringer, 2013). Unlike other research methodologies, action research produces contextualized data specific to the problem and participants; the research becomes the voice of the population. Furthermore, action research is inclusive and promotes ownership; allowing all relevant stakeholders an opportunity to work towards problem solving strategies that create sustainable solutions and positive change. For example, social workers who administer programs in a macroenvironment may simply be unaware of the challenges faced by social workers on the front line, intervening at the microlevel. Likewise, microbased social workers may be unaware of programs or other resources available to their elderly clients.

Using an action research process guided by an informed agenda, regional Bulgarian social workers who deliver or administer programs to the elderly were invited to become email interview exchange participants. The initial email purpose was to introduce the research and to explain how the email interview exchange process works.

Subsequent email interview exchanges reflected a focused protocol that described the needs of Bulgarian elders through the elicitation of challenges and barriers faced by the population and the social workers. The collaborative goal of the email interview exchanges was the development of solutions responsive to social work practice challenges to support successful aging opportunity within the framework and resources of social work practice.

Like a semistructured focus group, a structured email interview exchange protocol proportionately matched with micro-, mezzo-, and macrosocial worker roles guided the group topic and information exchange in a manner that shared the perspective of exploration asynchronously (see Hardy et al., 2016; Wach, 2015). The individual participant responses were transferred from the individual email correspondence into a word processor file in a deidentified participant format adherent to Walden University and NASW (2017) policies and ethical guidelines, respectively. The complete dataset was translated into a master file using professional grade translation software. I initially reviewed the mechanically translated data against the interview protocol and made notations as necessary where interpretations were unclear in meaning. The master file containing the side-by-side deidentified Bulgarian and mechanically translated responses were securely transferred by me to the local translator for correction and clarification. The individual data, less the demographic portions, were further randomized in ordering and checked for subtle identifiers before being returned in another email exchange for member checking and reflection purposes. Primary analyses of the approved final English translation used a scissor and sort technique that removed data with relevance to

the research questions for further analytical processes that developed themes inductively (see Stewart & Shamdasani, 2014). Upon the presentation of the thematic findings to the email interview exchange group for their individual feedback, the participants became invested in the analytical process to ensure that the findings reflected a thematic analysis that shaped further information exchanges and interview protocols (see Nind & Vinha, 2016).

Significance of the Study

Much research is directed towards understanding the attributes and trends of successful aging, but minimal research addresses the occurrences of intervening crises that threaten the successful aging opportunity (Torres, 2003). For example, within one generation successful aging expectations have remained constant among Bulgarian elders, but perceptions, challenges, and barriers viewed by social workers in practice settings who deliver or administer services may not have been congruent with the population served. Therefore, my collaborative engagement with Bulgarian social workers through action research provided a rich understanding of the problem, population, and regional social work practice. The mechanics of the study, along with the findings increased social work practice understanding of the problem, identified multilevel challenges faced at service delivery, and labeled system barriers that inhibited progress. The transactional process of information exchange prompted creative thinking about strategies that could mitigate the problems discovered in each other's practice environment. Also, because all participants were social workers, the values, ethics, and mission of social work practice was an overarching guideline that was expected to ground

responses and ideas uniformly. Since some of the social work participants were administrators or worked in a macrolevel setting, it was important that they also applied social work values in their critical thinking processes.

Upon the successful completion of this action research project's scope, a demonstrable participant change process and findings from the collected data that accurately reflect the problem and the population, the ultimate goal was to foster positive social change in the participant and beneficiary stakeholder populations. Although the desired potential positive social change implications from this project would directly and immediately benefit the Bulgarian elders in crisis, more tangible and attainable implications that act as an impetus towards this goal are considered for the scope of this project (see Huang, 2010). Therefore, I anticipate that the momentum generated from this project, harmonized with other contributors, will provide a sustainable pathway of social change towards the alleviation of the successful aging crisis in the Bulgarian elder population. Tangible and incrementally foundational examples of potential positive social change from this project are primarily in the participant stakeholder groups of Bulgarian social workers whose practices interact with the elderly population.

First, positive social change implications within the microinteractive social worker group could result in more focused direct care due to augmentations in practice stemming from the information shared about successful aging. For example, direct care social workers may have been overly focused on the physical wellbeing aspect of successful aging, but less responsive to possible mental health conditions (see Sodexo Institute for Quality of Daily Life, 2011); paradoxically a source or primary contributor to

physical ailments that inhibit successful aging opportunity (APA, 2013). Reallocation of scarce resources for specific individual needs, such as mental health intervention, would acknowledge and respond to the multidimensional aspects of successful aging.

Second, potential positive social change implications with the mezzointeractive sphere of influence would be informed by the understanding of successful aging through the lens of micro- and macrointeractive social workers within the participant group. For example, through comparison and reflection an increased understanding of the multidimensional aspects of successful aging and identified practice challenges and limitations of macrointeractive practice could enable the mezzointeractive social workers to develop or refocus community programs that may not be aligned or efficient in delivery or logistics. Practice improvement tasks, such as program outcome evaluations, as part of research culture mentioned by Gardner and Nunan (2007), could create positive social change through recommendations and subsequent implementations that would realign program mission to support multidimensional aspects of successful aging. Small, incremental changes, not necessarily program overhaul may demonstrate to other agencies and even retailers the importance of understanding and effective response to the needs of elders.

Third, macrointerventive social workers are practitioners who are the gateways that provide representation and advocacy to the beneficiary population through the social workers who interact with Bulgarian elders at the micro- and mezzolevels. Therefore, incremental and measurable positive social change can have a magnified impact that has sustained growth potential based on performance. The understanding gained, and

consensus achieved through the action research collaborative process about the systemic properties of successful aging will enable important change on two fronts. First, barriers in policy, funding allocation, or politics that inhibit micro- and mezzopractice can be addressed by the macrointeractive social workers to relieve the burden that wastes time and resources originally allocated to the elders. Second, new policy or funding streams can be established for the newly discovered aspects of successful aging, such as the previously mentioned mental health component. The establishment of more available mental health support would benefit not only the elders but the entire community; a positive social change that is fundamental to a community's ability to thrive and overcome future social concerns.

Realistic positive social change implications stemming from this action research project are small, measurable, and incremental, but most importantly aligned to future achievement of providing all Bulgarian elders the opportunity to age successfully. The outcome of the project is expected to be an impetus of change that conjoins other resources, creating a momentum to collaboratively and systemically respond through actions that support the multidimensional components needed for successful aging to occur. As Gardner and Nunan (2007) proposed, the key to effective action research is not only the outcome towards goals but the perpetuation of the cyclical action research process itself.

Theoretical/Conceptual Framework

Bronfenbrenner's (year) ecological systems theory (EST) and continuity theory (CT) were used to provide a contextualized framework to study successful aging. A good

fit with social work ideology, when researchers apply EST to a problem, they seek to understand a phenomenon by recognizing the person, environment, and the nature of transactions between those and other interactive elements within the system (Bronfenbrenner, 1986; NASW, 2017). The acknowledgement that successful aging expectations are largely shaped by culture and other historical norms, using EST helped me identify the shaping components, which further define the multidimensional properties that influence the aspect of continuity (see Castiglioni, Hărăguș, Faludi, & Hărăguș, 2016). The EST framework best produced an accurate, contextual, and holistic perspective of how Bulgarian social workers viewed successful aging and associated challenges in practice and delivery. Equally important as the constructed holistic portrait was the demarcation and categorization of all input components, markedly the Bulgarian social worker participants who directly and indirectly interacted with the Bulgarian elderly. The use of EST assisted my identification of participant (Bulgarian social worker) roles with their associated interventions that impacted Bulgarian elders; the interventions were translated into a systematic paradigm common to social work practice (see Bronfenbrenner, 1986; Jones, 2005). For this study, this spectrum of interaction type spanned direct care to federal policy administration. Because EST is a systems-based theory, examination of how these interventions at micro-, mezzo-, and macrolevels of Bulgarian social work practice impacted perspectives of successful aging, and its barriers was a well-matched analytical framework to contextually define the systems, components, and associated interactions for clarity, accuracy, organization, and synthesis with literature (see Bronfenbrenner, 1986). Remembering the other important

dimensional aspects of interaction upon the participants and elder population, EST also incorporated the influences of social worker personal attributes, as well as overarching cultural and religious norms that contributed to the level of alignment and harmonization to the environment (Fernandes, 2013), which in this case was the threshold between successful and unsuccessful aging.

Contextualized by EST, psychosocial grounded CT is a theory of aging that represents the motivation to successfully adapt and overcome disruptions faced during the life course of old age to achieve consistency across the dimensions that comprise successful aging (Breheny & Griffiths, 2017). Connecting the effectiveness of adaptability required by CT, Mansvelt, Breheny, and Stephens (2014) asserted that individuals who lacked historical insecurities such as the absence of caregiving, resources, or any other type of poverty, did not build coping skills necessary to form effective adaptive strategies faced as an elder. Therefore, CT in the context of successful aging was very well matched to the Bulgarian elder population since they are the first generation of elders outside of Communism and have incorporated associated ideology to their successful aging expectations (Kulcsár & Brădăţan, 2014). In application to this action research project, more than half of Bulgarian social workers are young and have no recollection of Communist ideology that provided sociohistorical security (Dimitrova, 2017). Serving a dual purpose, CT created a lens to understand better the historical context of Bulgarian elders and their expectations for successful aging (see Iecovich, 2014). Also, CT was an applicable theory that operationalized the family continuum of intergenerational caregiving linked to the Bulgarian elder population (see Macfie,

McElwain, Houts, & Cox, 2005; Nimrod & Kleiber, 2007), and provided in depth understanding to the social worker participants (see Cosco et al., 2015).

Values and Ethics

The undertaking of an international project required that similarities and differences in social worker roles, responsibilities, values, and ethics be examined, analyzed, and carefully applied throughout the project design (Wilkinson et al., 2017). Regarding social work values and ethics, Bulgaria does not have its own code of ethics or national association to unify the profession, but several different practice bodies within have declared their allegiance with the International Federation of Social Work (IFSW) and its associated ethical codes (Barnes & Hugman, 2002). Therefore, it seemed reasonable for this study to apply the values and ethical guidelines of the IFSW (2004), which is an overarching and globally encompassing architecture for all social workers. In the review of the IFSW content, comparison against NASW content, and other than the exclusion of the Universal Declaration of Human Rights (UDHR) by NASW (Keeney et al., 2014), it was found ordered differently, but in alignment with the meaning and spirit of NASW values. Although barriers to successful aging in contexts other than in Bulgaria could be considered an infringement of human rights, such as targeted tyranny, or forced euthanasia, the ethical reflections of NASW values support interventions that create a positive social change for the elderly. Lastly, because this project and committee emanate from Walden University in the United States, and because of my familiarity with the *Code of Ethics* by NASW (2017), it was justified to reference the NASW rather than the IFSW throughout this project.

All ethical principles reflective of the core values of the social work profession, such as positive change that enhances human wellbeing (NASW, 2017), guided this project in its entirety and is evidenced through its responsive content and actions. Since this study directly interacted with fellow social workers through an email interview exchange process, Section 2 of the *Code of Ethics* by NASW (2017) was especially relevant due to the interwoven nature of the multileveled and hierarchal participant pool.

Most important of this ethical standard subset, ethical responsibility to colleagues, is the maintenance of confidentiality. To achieve confidentiality that could otherwise disrupt client services, jeopardize careers, or cause policy change/enforcement, all of which may compromise data accuracy, the structure that was being interacted with, (i.e., interwoven nature and structure of relationships and transactions) must wholly be understood (see Barnes & Hugman, 2002; NASW, 2017).

Furthermore, Section 5.02 of the *Code of Ethics* by NASW (2017), which pertains to responsible evaluation and research practice, directs researchers to fully explain data access, data storage, data contents, such as level of anonymity, so that levels of confidentiality are clearly understood; factors that have a direct influence on participation level and unfettered interaction (Cyr, 2016). Moreover, it is anticipated that this action research process and positive outcome associated with the narrow scope of this project will become a template for solving other social work practice problems in the Bulgarian or contextually similar societies, thus more broadly furthering the mission of social work by propagating the spirit of social work into other systems and entities that shape society we live in.

Review of the Professional and Academic Literature

A response from firsthand witnessing the impacts of the elder crisis in Bulgaria, two research questions emerged to guide this project: (a) “What are the perceptions and expectations of social workers related to successful aging for Bulgarian elders?” and (b) “What are the barriers identified by social workers that inhibit successful aging for Bulgarian elders?”. Together, these two research questions encompassed five primary elements foundational to the context and scope of this research project: (a) action research methodology, (b) theoretical frameworks of systems theory and continuity theory in aging, (c) successful aging, (d) intergenerational caregiving, and (e) Bulgarian social work. These topics, which form the following literature review, other than Bulgarian social work, which I have completed an exhaustive search of the literature on social work practice and could only find several articles, separately yielded sufficient material to provide basis and rationale for this project. Collectively, almost no literature supported the specific focus of this topic. My query for professional and academic literature included Walden University databases, Google Scholar, and local repositories in Bulgaria. During the literature search process, probable relevant literature discovered in Bulgaria was electronically translated into the English language for content matching analysis, and if selected was translated more accurately and incorporated into this project. Although there was almost no literature focused on the specific problem addressed by this research project, the syntheses of the following topics provided an informed approach to the project.

Study Methodology: Action Research

Incorporated into qualitative research design, action research is a methodology that uses a qualitative research design framework to explore and understand a specific social issue to facilitate effective problem solving of a local problem by creating a community of participants as decision makers (Stringer, 2013). Because of its adaptability to diverse problems and populations, and because it is a feasible methodology that produces real life or practical solutions for urgent problems, action research was well matched to the needs of this project, and to social work values and ethics (see Fern, 2012). Moreover, action research is a reflective change process that improves practice through collaborative effort; a process that never ends as it endeavors to mitigate societal changes that negatively impact its members.

A review of academic journals described many different components of action research as applicable to their respective research, but very few present the big picture of action research, its available components, and recommendations for application. Therefore, this project relied heavily on three separate textbooks by Kaner (2014), McNiff (2016), and Stringer (2013) that presented foundational information necessary to build this project. Although Kaner's work aimed more upon decision making processes of participatory action research, the information and recommendations about being an effective facilitator are invaluable, and when incorporated into the methodology it added a high degree of rigor to the project. The McNiff's work was a great resource as a practice improvement tool that guided this research project by ensuring that the proper elements and format existed within this document because research without proper

explanation is worthless and ethically compromising. Secondly, Kaner's and McNiff's works effectively prepared researchers to be a participant, and to be a part of the change process, whereas other literature often presented action research like conventional research that disconnected the researcher from the population; an attempt to overcome bias and reduce the threat to validity. I feel that these texts sufficiently grounded me and my writing to reflect the dual role of a researcher as a participant. Stringer's (2013) book was the core source for action research theoretical aspects, operational recommendations, and suggestions of how to apply the findings to action development and implementation phases. Stringer's presentation of action research helped to shape components, such as data collection and analysis techniques, and to create the most useful findings accurately aligned with the contextual framework and needs of the participants (community) rather than rigid boundaries of theoretical frameworks. For example, a difference is visible in the unit of analysis between a survey driven participant group and a discussion driven participant group, individual unit of analysis and group unit of analysis, respectively. Projects like this one that have multileveled participants whom may have no or little interaction of each other's relationship to the elder population illustrate the importance of methodological adaptation to need since consensus would be harder to reach due to the lack of learning and insight gained through a discussion or information exchange format if an individual unit of analysis was applied (see Cyr, 2016).

One aspect unique to this project, language differences between the participants and me were not addressed in the textbooks mentioned above. Initially, I viewed this aspect as an obstacle that would negatively impact the project components. However,

after querying literature for guidance, a journal article by Al-Amer, Ramjan, Glew, Darwish, and Salamonson (2015) asserted that a fully explained process of interview translation created a higher degree of rigor, truthfulness, and transparency. Further, Al-Amer, Ramjan, Glew, Darwish, and Salamonson proposed the use of debriefing sessions to present findings (reverse-translated) data to the subjects for their review of translation quality. For this action research project, the use of this type of debriefing as a member checking strategy integrated these aspects into a systematic process supplemental to what McNiff (2016) and Stringer (2013) provided as a framework.

Theoretical Frameworks

Unique to other professional disciplines, the grounding of social work values and associated ethical procedures in practice and research demands that intervention must be responsive to the person and the respective environment (NASW, 2017). Singular theoretical frameworks foundational to interventions, such as continuity in aging, would not achieve the holistic requirements of social work since it would be focused on the individual and not considerate of their environment. Therefore, an overarching explanatory framework was needed to identify the person in environment, effectively contextualizing other theories used in practice or research.

Systems theory. Bronfenbrenner's ecological systems theory (EST) is a long standing, time-tested theory that is very closely aligned with social work because of its multidimensional framework of description and understanding of components and their interactions with other components or systems (Miller, Hayward, & Shaw, 2012), (i.e., the understanding of the person or problem within its environment) the heart of good

social work (NASW, 2017). EST views humanity as a system with components and other systems that interact with each other through transactional processes across time and human dimension type (Bronfenbrenner, 1986). In addition to explaining the structures and interactions within the system, EST identifies homeostatic imbalances of members and the transactional source. For an action research study, such as this project that intervened with multileveled social workers, it was a vital shaping tool for practice problem identification and remedy (e.g., the discussion of a problem outside the practice scope of a stakeholder would be fruitless). Viewing social work practice through a systems lens is no different; micro-, mezzo-, and macrotypes of interventions can all act upon one system or component, but in different modalities, goals, and effectiveness. Therefore, the organization of framing this project under a systems theory ensured that other supportive and analytic theory could mesh with the problem and population in an ethically responsive means specifically tailored to serve the needs of those who are out of equilibrium.

Although it could be argued that systems theories or other paradigmatic theories could have been used instead of Bronfenbrenner's (1986) EST as a method to contextualize the analytic theories, the intertwined relationships between human development in aging, which encompasses all human dimensions, the nature of social work, and the study of a foreign culture, supported the named choice. Also supportive of Bronfenbrenner's (1986) EST choice was the social learning perspective attributed to Lev Vygotsky (1978) that promoted a platform of free flowing thought, discernment, and decision making process and consensus (Rosa & Tudge, 2013). In his writings, Vygotsky

claimed that a person or described problem could not be fully or effectually understood or transmitted to others if it (discussion) occurs outside of the environment it exists in (Vygotsky, Cole, John-Steiner, Scribner, & Souberman, 2006). Without this aspect of social learning, action research participant groups would lack the necessary transactions of information and be rendered unproductive and unfocused, which would ultimately hinder the transformative change process of the participants (Odelius et al., 2015).

Continuity theory in aging. Since aging has been a voiced world concern for many years now, the introduction of multiple theories related to aging is in response to specific concerns, populations, and needs. The choice to incorporate continuity theory (CT) in aging into this research project was because its dynamic qualities of adaptability to maintain a continuum were in alignment with the relative nomenclature of successful aging (see Nimrod & Kleiber, 2007). Historically, the theory to describe the aging process was disengagement theory - a theory described by Ejechi (2015) that successful aging was a gradual withdrawal from society, (i.e., a course of action parallel to physical and mental decline). As social dimensions were considered important to successful aging, competing theories, such as activity theory, emerged to incorporate this dimension, but could not be individually applied because the characteristics of activity were not universally definable (Lemon, Begtson, & Peterson, 1972). Atchley (1989), the founder of CT, understood that activity was a positive influence for successful aging, but introduced the concept of consistency in maintaining historical patterns of life. The concept of adaptability was introduced as a mechanism to achieve the desired or expected continuity through the developmental period of old age, thus gauging activity.

Maintaining the understanding that through adaptability, elders and social work practice have successfully navigated some barriers through change, but have not overcome other barriers that were of negative consequence. Therefore, CT through adaptability matched the need as a qualified mechanism to identify barriers and disruptions dually in the continuum of aging and practice (see Goldberg & Beitz, 2006).

In Western and other nations where physical wellbeing is the almost singular indicator of successful aging, theories such as activity theory have taken preference in the literature (Ouwehand, de Ridder, & Bensing, 2007). From an anthropologist's perspective, Iecovich (2014) promoted the application of CT in aging to present the historical aspects of successful aging expectations, namely the socialistic ideology, which may have been unknown to younger social workers in Bulgaria. Secondly, CT was in alignment with the concept of intergenerational caregiving, (i.e., the preservation of the family continuum) a cultural expectation of successful aging (see Macfie, McElwain, Houts, & Cox, 2005; Nimrod & Kleiber, 2007).

Successful Aging

Rather than a universally definable concept, literature presented successful aging as a perception relative to the uniqueness of a culture or individual (Zanjari et al., 2016). Scales measuring different aspects, such as wellbeing and quality of life, theorized to change during aging have been used to attempt the creation of a universally operational definition of successful aging (Torres, 2003). These attempts, in addition to a meta-analysis by Kim and Park (2017), indicated that the operationalization of the term successful aging remains unachievable. As the highest point of Maslow's hierarchal

pyramid, self actualization, foundational upon multidimensions of human need, successful aging is the pinnacle, but not a predetermined level of distance. Research by Torres (2003), understood the multidimensional needs as foundational for successful aging to occur and promoted programs that supported important dimensions other than physical health; the most common focus for the quality of life and lifespan (Kim & Park, 2017). For this research study, findings from the exploratory research questions provided an insight of dimensions and their levels that constitute a threshold between successful and unsuccessful aging for the current generation of elders in crisis, which through the action phase of action research can ultimately lead to well-matched interventions that are value laden and ethically responsive to propel continuity or facilitate adaptability.

There is less literature devoted to understanding the relevant aspect of successful aging among diversity, (i.e., how successful aging could be accurately benchmarked within a certain population). Tam (2014) heavily weighed the influence of culture, religion, shared experiences, and wealth, in the determination of successful aging achievement. Further supporting this concept, Fernandez-Ballesteros et al. (2010) asserted that individual goal achievement best described successful aging. Because goals can change (adaptability) when barriers remain, successful aging can continue at a different level, or it can fail when adaptability lacks the necessary support. Matching this rationale as an example, the application of CT contextualized and helped to explain successful aging for those following the project, and for younger generational social workers who did not understand the impact of historical context (see Cosco et al., 2015). The consensus among literature as indicated by Fernandez-Ballesteros et al. (2010), Tam

(2014), and Torres (2003) indicated that above all else, a contextually informed framework must be used to study successful aging; a well-aligned directive with good social work practice (NASW, 2017).

Because successful aging is a self-descriptive term, and this project's participants were social workers, there was a concern that their perspective was not the same as the Bulgarian elders because of generational difference and ideological shifts. Kelly and Lazarus (2015) addressed this concern by emphasizing the need to keep the context attached to successful aging perceptions. Therefore, as part of the email interview exchange process, it was important to incorporate historical contextual features into the interview protocol as a litmus test for this important aspect.

Intergenerational Caregiving

Like the definitional challenges presented with the term successful aging, the description of intergenerational caregiving in recent Western literature is changing to reflect an intergenerational relationship beneficent to an independent elder from someone who may not be offspring or have any other connection, thus creating a difficulty in applying new literature to historically understood intergenerational caregiving (see Sakurai et al., 2016). Historically understood intergenerational caregiving is a structural component of the family system that through transactional processes provides a continuum of reciprocal care for all members and establishes a pathway for financial, cultural, and religious belief transfer (Iecovich, 2014; Khan, 2014; Lewis, 2010). Present in many societies scattered throughout the world, intergenerational caregiving has been a historical mainstay and continues to be a normal expectation that supports successful

aging (Walsh, 2012). As parents become elders, and their children mature and have families of their own, the elder parents leave their career and begin to undertake household tasks and provide care for their grandchildren when the parents are away at work. Intergenerational families of Bulgaria typically lived under one roof or in separate cottages on the same property and collectively improved their lifestyle, always with the thought of transfer to the next generation (Kulcsár & Brădăţan, 2014). Besides being logistically efficient, this arrangement served other purposes for the elder. The involved interactions with their grandchildren fostered a healthy environment for the transmission of cultural, ethical, and religious aspects important to the elder; a reinforcement of purpose, and an expression of generativity (Koib, 2004). When studying these components of intergenerational caregiving about wellbeing, Hajek and König (2016) discovered that it was statistically insignificant who provided the care, only if the components remained present. Further extrapolating this rationale, Sakurai et al. (2016) explained that independent care outside of the family, more common in Western society, could replace the more tangible components of intergenerational caregiving such as security against poverty types, safety, and health, but when children interacted with these independent elders, they (elders) reported more happiness and satisfaction. Because the loss of any components due to catastrophe severely and negatively impacts successful aging and exceeds the coping ability to adapt to form a healthy continuum (Khan, 2014), the term intergenerational caregiving for this project was considered interdependent with successful aging, and a foundational structural transactional delivery system of the Bulgarian family that met the multidimensional expectations of the elders. Specifically,

it was the continuous interdependent relationship between generations that multidimensionally facilitated the achievement of successful aging through the realization of old age expectation, or by supportive adaptation when needed.

Elders in cultures or societies, such as the United States that are a melting pot of global cultures, are no longer so dependent on intergenerational caregiving due to sociohistorical events that shifted societal norms: women in the workplace stemming from WWII, financial independence from increased wealth, availability of social programs, and other supportive structures that effectually replaced the need for intergenerational care (Singh, 2015). A majority of literature chronicles historical aspects of intergenerational care in the United States or isolated studies of indigenous tribes, but the overall view of intergenerational care in the context of U.S. culture is a less desirable pathway for successful aging (Castiglioni, Hărăguș, Faludi, & Hărăguș, 2016; Kulcsár & Brădățan, 2014). Therefore, a small segment of literature from Europe provided insight into the past and present intergenerational caregiving phenomenon. From a mental health aspect, studies by Hajek and König (2016) found that intergenerational caregiving reduced the incidence of mental illness, whereas intragenerational caregiving produced the opposite. This finding reinforced the need to understand and apply the importance of intergenerational caregiving when developing solutions that effectively replace it. Furthermore, a European study by Kulcsár and Brădățan (2014) in neighboring Romania, a country with a similar sociohistorical past, demonstrated through comparative demographic statistics that family structural changes due to intergenerational caregiving disruption had a much more profound impact on rural elders; a contributing factor in

selecting the geographic placement for this project – a concept of triaging the most vulnerable (NASW, 2017).

Bulgarian Social Work

Operationally defining roles and responsibilities of social workers was vital to understanding how their practice intervenes with populations such as Bulgarian elders. Applying assumptive characteristics from knowledge based in other countries would have improperly informed the overarching systems theory, and ultimately lead to misaligned and unproductive research components. Moreover, the ethical consequences would ethically compromise the entire research and create harm through the introduction of new barriers to the participants and Bulgarian elders (see NASW, 2017). Therefore, a clear and holistic understanding of Bulgarian social work, in a structural sense, was needed. The website of Regional Administration Gabrovo (2017) sheds some light on the grouping of their social workers. The administrative social workers are directed by a financial director and are physically located in another office, whereas the direct practice social workers appear on various types of program pages. Beyond this, an extensive literature search in the English language had not yielded enough information necessary to understand the Bulgarian social work structure fully, but several recent articles were written in response to needed changes reflective of a changing society. In a plea to bring standardized ethics into Bulgarian social work practice, Georgiev (2017) wrote that since Bulgaria formed the Bulgarian Association of Social Workers (BASW) in 1995 and adopted the International Federation of Social Work (IFSW) ethical code, the code remains untouched and largely forgotten - most social workers do not know what the

ethical code is. The author further wrote that since the BASW is inactive and its ethical code obscured, professional identity, including roles and responsibilities are no longer definable.

A recent article by Dimitrova (2017) laid the groundwork for the development of professional identity by identifying the vocational need for more social workers due to the increase of social issues and the lack of social work representation in supporting structures. Dimitrova reported the following findings from a questionnaire given to child protection respondents that explained the need: 36.9% of graduated with a social activities degree, 8.6% had a social work specialization, and 44.4% reported difficulties handling difficult situations because of the lack the knowledge and training. The report, however, did not mention what levels besides direct care (e.g., case managers) the participants may be working. Because roles that equate structural levels of practice were not formally established or even identified and was an important element to the research design, a key informant was needed to explain firsthand who is working with the elderly population in a social work role as described in the *Code of Ethics* by the NASW (2017). Ensuring that all participants were provided the opportunity to participate in the research increased dependability, credibility, and overall rigor (see Stringer, 2013).

Conclusions

The social work practice problem regarding the successful aging crisis in Bulgaria was to understand the problem about multilevels of social work practice holistically, to reach a consensus, and to unify in a response. Literature on successful aging and intergenerational caregiving was abundant but lacked the necessary context for the

Bulgarian population. Literature about action research was abundant, but literature about Bulgarian social worker roles and responsibilities was extremely scarce in the English language search attempts. The lack of context, a vital component of action research, was identified as the gap in the literature and was paradoxically the reason for this action research project. The findings reflective of a successful project inform other literature, provide context, create the impetus for further research, and most importantly improve practice to effectively mitigate the current complex and systemic aging crisis.

Section 2: Research Design and Data Collection

The primary task of social workers is to work within systems and components to identify and mitigate everchanging phenomena that disrupt societal equilibrium. The focus of this project was not to externally identify the successful aging crisis in Bulgaria, but rather to gain insight and perspective from local social workers about successful aging and associated barriers they encounter or envisage as practitioners, with the goal of developing and implementing positive change that grants relief to the elders. The lack of focused literature to bolster hypothesis or other theoretical frameworks to examine the problem suggested that a qualitative-framed exploratory type of research design be used to collect a contextually rich understanding of the problem and population. Understanding the issue as a social work practice problem unified multileveled social workers who interact with elders and collaboratively reached a consensus on the best course of action to overcome barriers and to create strategic and sustainable interventions.

This section, the description of the plan used to research the problem described in section one, is the architecture that was implemented to collect and analyze the data. The three major sections, research design, methodology, and data analysis, describe how qualitative action research methodology explored, through a structured and ethical responsive process, the social work practice problem in a collaborative perspective that was reflective of the population and culture. The findings prepared the foundation to recommend actions and recommendations as outlaid in section four.

Research Design

Based upon visual experiences and my conversation with a local Bulgarian friend several years ago about the current elder crisis, I wondered how local social workers perceived the problem, what they were doing about it, and what barriers inhibited their interventions. Being a social worker who upholds the values, ethics, and spirit of the social work profession as detailed in the *Code of Ethics* by the NASW (2017), I understood the problem as an interwoven systemic phenomenon, requiring a multilevel social work intervention to make positive change for the elderly population. Therefore, I determined that exploration of this social work practice problem was best aligned with a qualitative research design using action research methodology. The qualitative framework of research sought to inductively discover and explore this phenomenon in a manner that extracted rich and unframed data unique to the contexts of the population and the problem.

Since very little literature focused on this problem existed, and the crisis is no longer emergent, but fully realized, action research properly applied to primary stakeholders was deemed the most effective approach to gain an understanding of the problem and to develop viable solutions straightforwardly implementable within the existing structure of the systems (see Fern, 2012). Equally important in intent, via proper application of this methodology I sought to create collaborative networks, contribute to professional and academic literature, generate theory, and to not impose researcher or literature bias in the design (see Stringer, 2013). Since I was also a learner and participant in the research process, change and growth opportunity occurred to all

participants; the overall purpose to improve social work practice and create positive, responsive change for clients and community.

Methodology

Prospective Data

Data collection type and the method of acquisition were the essential components of how this exploratory qualitative research design answered the research questions in a collaborative change process format that transcended formal findings by formulating an effective and sustainable solution to the problem (McNiff, 2016; Stringer, 2013). Therefore, a data collection method aligned with the qualitative design was needed to inclusively allow the presentation of individual perspective that promoted learning, change, and group consensus. Of the numerous data collection methods available, Stringer (2013) promoted the use of focus groups in this instance, mainly because the data collection process is not bound by an interpretive framework that allows participant thought free from a researcher or theoretical paradigms. A modern variant of the focus group used in this action research project, email interview exchange (see Wach, 2015), upheld the abovementioned characteristics of the focus group but was better matched to the ethical requirements of a transcultural research project where the researcher was also a participant. Through analytical processes, the data produced useful themes that shaped subsequent email interview exchanges, and ultimately provided focused findings that provided the foundation to the development and implementation of well-focused actions to mitigate the elder crisis.

Participants

The participants in this study were Bulgarian social workers who practice at micro-, mezzo-, and macrolevels with the elderly Bulgarian population located within the rural Gabrovo region. Only applying the criterium that their practice interactions include the elderly population, rather than licensure or degree, the regional office website hosted in Gabrovo, which encompasses all regional workers from dozens of rural villages, identified the social worker participants (Regional Administration Gabrovo, 2017). Because I am still considered a foreigner, primarily due to the lack of language proficiency, I followed Stringer's (2013) recommendation of the use of a local key informant with the following characteristics: (a) aligned contextually with the participants, (b) trustworthy, (c) interested genuinely in the project, and (d) capable of effective communication in a reciprocal format. Equally important is the key informant's knowledge of bureaucratic and hierarchal structure that may constrict the scope of social workers available to participate (see Hwang, Mollen, Kellom, Dougherty, & Noonan, 2017). For example, the location or department of administrative social workers may differ, and due to the terminology of what a social worker is in Bulgaria, they may not be considered a social worker because they administrate rather than provide direct or program level interactions with the elders. For this study, participant social workers included those whose practice scope entails direct or indirect interaction with rural elders from the Gabrovo region. An oversight to not seek inclusion of the macrolevel social workers would have severely compromised the data and outcome of this project (see Gardner & Nunan, 2007; Stringer, 2013). Justified by the above reasoning that shaped

the unique requirements of the key informant for this project, a lifelong resident and mayor of five local villages in the Gabrovo region who is semifluent in English adequately met the criteria to be the liaison charged with recruiting the social worker participants.

The chosen sampling frame, informed by literature, was geographically restricted to the rural Gabrovo region of Bulgaria. Gabrovo is a regional postindustrial city with a declining municipal population less than 100,000 located in the Stara Planina mountains of northcentral Bulgaria (CIA, 2014; Shishmanova, 2010). Representative of Bulgarian demographics, the beneficent stakeholder group (elders aged 65 and beyond) is 54% female, 77% ethnic Bulgarian, and 88% of whom have a mean income 34% of the government established poverty level, which equates to less than USD 80 per month (CIA, 2014: Regional Administration Gabrovo, 2017). The targeted rural area of the Gabrovo regional authority consisted of 355 villages and hamlets with a combined population of fewer than 2,000 elders, enclosed within 1,952 square kilometers; a mean distance of 18 kilometers between residence and essential services, such as practitioners (Regional Administration Gabrovo, 2017). Other remarkable differences between urban and rural elder populations reported by the Regional Administration Gabrovo (2017) were the increasing ratios of female elders and ethnic Bulgarians whose residence was considered rural, 68% and 98%, respectively.

Responsive to the above-identified demographic portrait and identified social worker roles, purposive sampling was used to inclusively select multileveled social workers whose practice scope and interaction include the Bulgarian elder population.

Because purposive sampling is a nonprobability sampling type, it could be argued that it lacks objectivity (Groves et al., 2009) because it may not truly be representative of the whole sample. However, preliminary examination of the website by Regional Administration Gabrovo (2017) indicated that there might only be 8–10 social workers in total, an ideal number of participants for an email interview exchange to foster equal participation opportunity, collaboration, inclusion, and ownership (see Stringer, 2013). Contingently, if the sample size would have exceeded the estimation and was too large for an email interview exchange, an expert strategy would have been applied that ensured experts were selected as participants from each interaction level. The expert strategy relies upon a key informant who understands the structure and the participants to make participant recommendations (Wretman, 2011). This rationale promoted a higher level of participant representation aligned with the sample throughout each system level of social work interaction involving the elderly (see Mammen & Sano, 2012).

Instrumentation

Well matched to the nature of the exploratory-based research questions, this project only collected primary data through an email interview exchange process; a method like a focus group, which required an informed approach, organization, interview skills, and a platform supportive of a democratic process (see Kaner, 2014; Nielsen & Lyhne, 2016; Stringer, 2013; Wach, 2015). An interview protocol (discussion agenda) was carefully developed to effectively develop and guide the skills necessary to accurately convey the literature informed research questions. Taken from elements of participatory action research, I compiled an interview protocol draft based on the

synthesis of professional and academic literature into carefully operationalized questions that translated accurately into the Bulgarian language (see Kaner, 2014; Wach, 2015). Especially important in a transcultural qualitative research setting where translation is a form of interpretation; van Nes, Abma, Jonsson, and Deeg (2010) stressed that vernacular language common to academia, such as the use of professional lingo, acronyms, colloquialisms, or euphemisms, must be conveyed to the foreign participants in a standard and accurately translatable language to limit participant interpretation – a substantial and avoidable threat to validity.

Because I knew little about the roles and responsibilities of Bulgarian social workers regarding the elderly population, and literature on the subject was sparse, an explorative approach framed by the overarching systems theory provided a contextual understanding of the data focused on the research questions. These discussions were also beneficial to the social worker participants by providing clear and concise understanding focused on how their practice setting interacts with their colleagues and other systems that impact the elderly population (see Stringer, 2013). Equally important to me as the researcher was how to formulate an action plan that was feasible and aligned with the structure of the Bulgarian social work system (see McNiff, 2016).

The deidentified individual participant responses were further checked for identifiers, such as work affiliation, and redacted in the subsequent email interview exchanges, but were left intact and attached to the data to provide context – essentially like the usage of field notes recorded during a focus group discussion (see Squires, 2009; Wach, 2015). Especially in an exploratory research paradigm that seeks a holistic

understanding, contextual information is vital to clarify data, provide a richer description, and to denote topics that should be discussed further or investigated (Stringer, 2013). Important indicators of progress towards consensus, key themes, discussion points, and other insights gained were visually available at the onset of each email information exchange (Nind & Vinha, 2016; Wach, 2015) – a reflective process integral to action research that ensured the data are accurately reflecting the participants (Kaner, 2014; Stringer, 2013).

Data Analysis

Since the level of English language proficiency in the participant group was unknown, the email interview exchanges were conducted in the Bulgarian language to ensure full understanding occurred between all parties – an ethical consideration that the research project conformed to participant characteristics rather than of the researcher (see McNiff, 2016). Also, information exchanges conducted in a format or language foreign to the participants have a high potential of being a multifaceted threat to project rigor, including exploitations of vulnerable areas of research processes that if lacking foresight, would demark good research as untrustworthy (Stringer, 2013). McNiff (2016) asserted that trustworthiness and accuracy must be established and transmitted to all stakeholder groups (participant, beneficiary, and those in the between spectrum) throughout the processes and outcomes of the action research project to obtain a high level of rigor in action research. To achieve this, McNiff (citing Lincoln & Guba, 1985) identified four characteristics needed to be present: credibility, transferability, dependability, and confirmability. To the larger English speaking audience who may examine this research,

the above elements may be easily discernable based on what is written. The unseen challenge was to ensure that the reflection of the participant stakeholders was without distortion caused by cultural and language transactions, which is ethically paramount to the collaborative nature of action research and good social work (NASW, 2017; Stringer, 2013). A rationale using McNiff as a guide framed by the *Code of Ethics* by the NASW (2017) justified that the lone achievement of credibility through gaining trust would foster attainment of the three remaining above-mentioned characteristics vital to research rigor. Although McNiff did not specifically address the nuances of transcultural action research, several universally applicable actions were listed by the researcher that establish and foster feelings of trust: triangulation, member checking, and participant debriefing. Therefore, it was necessary to examine implementations of these actions in a transcultural context to develop methods within the research process specific to this project that multidimensionally bolstered rigor.

Echoing Lincoln and Guba (1985) (as cited in McNiff & Whitehead, 2010), Irvine et al. (2007), in their transcultural research, agreed that four criteria reflective of research design were necessary to effectively assess the degree of trustworthiness in regard to the quality of research: (a) credibility = internal validity, (b) transferability = external validity, (c) dependability = reliability, and (d) conformability = objectivity. Similar in the project strategy mentioned above with credibility as the focus, building a platform to attain rigor through transferability of transcultural research findings, Irvine et al. discussed the importance of understanding and implementing actions that promoted good rigorous research through the treatment of the cultural and linguistic diversity of

stakeholder groups. The method of translation within the processes of the research design encapsulated attributes of all four abovementioned components of research rigor. Therefore, a lack of informed planning, development, and implementation of the research process would have certainly compromised research rigor on all aspects, and would have been ethically unresponsive (Irvine et al., 2007). Using the research design components listed above and noting the pairing of the credibility component of rigor with internal validity, the actions to establish trust and ultimately rigor placed focus on the uniquely inherent property of action research; most importantly the collaborative interactions between the researcher and participants (McNiff, 2016). Deductively revealed through their analytical presentation, Irvine et al. acknowledged that transcultural research conducted in the native language were superior regarding rigor advantage, but moreover, innovative methods successful in thwarting threats to study rigor countered the logistical limitations of transcultural research that degraded this ideal framework. Three methods of actions dependent on the chain (internal validity, credibility, and trustworthiness) of establishing defendable rigor embedded within their research processes were examined and applied to the research processes as a strategy.

The participant pool who interact with Bulgarian elders consisted of micro-, mezzo-, and macrolevel social workers. The microlevel social workers are more commonly known as the direct service providers who assess needs and deliver services through programs managed by the mezzolevel managers and funded/directed through policy administered by the macrolevel social workers. Since the levels are singularized, a level of triangulation each level and me already existed. As I am not fluent in the

Bulgarian language, a certain threat to internal validity existed because I became a part of the data collection process; an essential element nature of action research (see Irvine et al., 2007; McNiff, 2016). The authors posited two possible paradigms to examine and consider when interacting with the transcultural information exchanges: (a) verbatim (mechanical) translation or (b) interpretation of meaning in context (informed translation). Rigid choice of either role could produce distortions in how the data is recorded and relayed to the researcher, who, therefore, promotes a balanced approach (Irvine et al., 2007). Since the professional translator for this project did not have social work experience, know professional terms, or understand underlying theoretical concepts of successful aging or intergenerational caregiving, pre preparation was necessary. The translator spent time with me in conversation to learn about this research topic and specific terminology. During the data collection process, the translator, who was not a subject matter expert, approached the information as a learner, which prompted participants to more clearly relay their thoughts through clarifications in subsequent information exchanges. According to McNiff (2016), this approach is a type of triangulation because different perspectives of the phenomena are present during the interaction, thus prompting clarification and assurance that the data accurately conveys the meaning.

Different than a focus group where the interpreter is present with the participants and a mutually trusting relationship can be nurtured (McNiff, 2016), the email interview exchanges using a local translator provided an unidirectional type of relationship that promoted an accurate localized interpretation of data that was contextualized through

expression of feelings, memories, and reflection written into the data (see Irvine et al., 2007). This benefited the study by bolstering trustworthiness of data as a component of establishing credibility among all stakeholder groups (see Squires, 2009; Wach, 2015). Although this relationship type was indirect with me, richness through augmentation of the data further benefited the research by providing high quality and contextual data. The employment a local bilingual Bulgarian rather than a non native bilingual Bulgarian speaker was an advantage because there would have been a greater risk of not properly understanding aspects unique to the culture or locale, ultimately conveyed to me as a low or guarded level of trust and displayed as impoverished data (see Irvine et al., 2007).

Similarly related to the benefits for the establishment of trust discussed above, a strategy to strengthen overall rigor through member checking was the incorporation of the local translator who is from an unassociated stakeholder group (see Elo et al., 2014; McNiff, 2016). Furthermore, borrowing from an innovative strategy to maintain rigor within the translation process, Irvine et al. (2007) used a back translation process to understand better how the data was corrected and clarified using a combination of mechanical and human translation services. First, I used a professional grade translation software named Paralink to translate the data from Bulgarian to English. The translated data was reviewed and saved in a master electronic file containing both the questions and the responses. The Bulgarian and English translation in a side by side format contained within the master file was sent securely to the local translator. The translator read each response in Bulgarian and corrected or clarified the provided mechanical English translation. This method, instead of using an aggregate data source, promoted a sharper

focus on each response by diminishing the human propensity to inject analytical elements into the translation (see Squires, 2009; Temple & Young, 2004). The corrected/clarified translation was securely returned to me for review, noting the changes between the English translations. Together, the translator and I met to discuss differences and to approve a final English text. Upon receipt of the final English transcript, I read it and made notations where needed, including items that needed a reintroduction to the email exchange group for clarification or explanation. The incorporation of a participant interactive strategy to address errors or missing data contributed to project vigor (see Onwuegbuzie & Byers, 2014). After completion of the data cleaning process, the analytical software program NVivo was used to parse the transcripts and classify elements into themes or codes. As expected, some of the codes were unrelated to the research questions or existed singularly as outliers. Therefore a strategy was needed to focus the data on useful findings further. For this type of research, Stewart and Shamdasani (2014) suggested the implementation of a scissor and sort strategy that removes data unrelated to the research. Lastly, the presentation of the peer-reviewed cleaned and analyzed data to the participants for review and feedback, a member checking strategy, promoted trustworthiness by the transparent demonstration of the lengths taken by me to ensure the data was accurate and high quality in the representation of the phenomena (see McNiff, 2016). Finally, with credibility established, the other important elements of rigor, confirmability, transferability, dependability were demonstrated by the design, transparency, and collaborative ownership of the findings; an

important consideration for garnering support for the action phase of solution implementation (Stringer, 2013).

Ethical Procedures

Integral to any social science research, ethical procedure throughout the entire research process must adhere to professional and academic guidelines and must convey values in spirit (McNiff, 2016). Three intertwined elements; privacy, confidentiality, and informed consent, were especially important to the this studied population because it occurred in a foreign country, and the political and hierarchal structures of the multilevel participants and their superiors were relatively unknown (NASW, 2017). Several adaptive strategies were approved by Walden University institutional review board (#06-13-18-0577457) and implemented to uphold these primary ethical elements. First, the invitation to participate sent to each participant's work email address requested that the potential participant reply using their personal email address if they wished to participate in the study. This protocol ensured that the organizational structure or hierarchal members who may have access to government email accounts of employees would not know who a participant of the study was. Second, the informed consent documents were written in plain Bulgarian language and were reviewed and signed through an email exchange using the above-mentioned personal email addresses requirement. This being a strategy that emphasized the importance to me that conveyed authentic care towards the participants and instilled aspects of the NASW ethical culture into Bulgarian social work. Third, the demographic data and any potential identifiers, such as gender pronouns and case changes within the data syntax, work affiliation, and references to special client

populations, were painstakingly redacted in the email interview exchange data provided to the email exchange group in an effort to prevent the identification a participant, or to attribute singular data to a particular participant. The deidentification strategy also upheld the desired analytical technique of group analysis rather than individual analysis, which ultimately reflected collaboratively deliberated findings rather than multiple perspectives (Cyr, 2016). Furthermore, these combined strategies ensured that power differentials within the group were noninfluential so that they did not suppress data or force others to agree with their suggested perspective (see Kaner, 2014).

Because this was an action research-based project, and I was a participant, I addressed several other ethical considerations in the structure of the research design and implementation of processes, respectively. First, the choice of a modern modality of the focus group technique, the email interview exchange, was supported by the specific characteristics of this transcultural research project and me, an English only speaker. The incorporation of an interpreter into the focus group would have effectively classified me as a co researcher, and not the main facilitative partner since my low fluency level of Bulgarian language does not support normal synchronous conversation. The asynchronous feature of the email interview exchange allowed me to be the facilitator, learner, and participant. Second, I needed to be aware of my personal biases and understand how to safeguard the project against it. Because I am from the United States and have worked with the elderly population, I already have a picture of what successful aging is. The elders I initially witnessed in Bulgaria, which were the impetus for this project, were assumingly not aging successfully according to my lens. This project

defined what successful aging is within the context of Bulgarian society. Even my facilitative questions contained in the interview protocol needed to be concise, and without presuppositions or leading components, otherwise, objectivity and credibility could have been compromised (see Stringer, 2013).

Summary

The concept for this project was a product of my firsthand experiences with elders in rural Bulgaria and a local Bulgarian friend who desperately wished for a solution, but at the same time had accepted the aging crisis was probably a new norm. Best matched to explore this phenomenon, a qualitative design utilizing action research methodology was supported as a scientific means to contextually understand the problem and find successful and sustainable solutions that incorporated the relative stakeholders through collaborative decision making processes (McNiff, 2016; Stringer, 2013).

An email interview exchange process using an informed interview protocol facilitated information exchange with multileveled regional social workers who interact with the Bulgarian elder population. Data were analyzed through rigorous strategies that produced themes consensual to the group and member checked by the participants. The findings presented to the participants elicited feedback that supported courses of action to promote positive change in a manner that respected the culture and importantly was ethically responsive to the beneficiary stakeholders, the elderly population of Bulgaria.

Section 3: Presentation of the Findings

This transcultural action research project was a response to an actual and ongoing elder crisis in rural Bulgaria that I witnessed firsthand. My initial encounter with an elderly and very poor woman desperate to sell her property for money to purchase prescriptions and other life necessary products and services challenged my paradigm. Although her situation was distressing to me, my Western perspective viewed her situation as a typical case management example of a single person in difficult circumstances requiring supportive services. My further similar interactions with other elderly in the region led to the discovery of an entire population, rather than individuals, in a crisis. Surmising, I understood a much more encompassing, culturally entwined, and systemically perpetuated problem existed for the rural Bulgarian elderly. Rather than to focus solely on the apparent lack of supportive services for the elderly, I chose to investigate the problem as a systemic phenomenon. I critically analyzed local literature, professional reports, and statistical data, and synthesized it with global literature on aging to develop an informed social work practice approach that would explore and seek understanding of the elder crisis. From this approach, I developed two interrelated research questions to be answered from the perspective of local social workers who work with the elder population: “What are Bulgarian social workers’ perceptions and expectations related to successful aging for Bulgarian elders?” and “What are the barriers identified by Bulgarian social workers that inhibit successful aging for Bulgarian elders?”.

Because I am American who conducted action research in Bulgaria, the transcultural partnership required special preparations and procedures to ensure the achievement and maintenance of ethical and high research standards throughout all elements of the project and populations, including the beneficent stakeholders.

Importantly, the transcultural nature of this action research project steered the modality of data collection from the social worker participants because I could not participate without an interpreter. Instead of using a researcher led focus group, which would have required an asynchronous interpreter who would have de facto facilitated the discussion as a coresearcher, an email interview exchange process with similar characteristics to a focus group modality was used to facilitate information exchange based upon an interview protocol that steered the information exchanges towards consensus in an asynchronous format. Conceptualizing the special requirements of the transcultural aspect as an overlay to data collection and analysis provides context and understanding to the following paragraphs and sections that concisely describe data collection and analysis techniques, and associated findings, respectively.

The participant pool for this capstone research project consisted of Bulgarian social workers from the Gabrovo region who professionally interacted through micro-, mezzo-, or macrointerventions with the elderly population from the rural Gabrovo region. Since I was not fluent in the Bulgarian language, and I did not understand the social system structure that contained the potential participants, a local key informant, known to this research project by the label local research participant advocate, was needed. The primary tasks of the local research participant ensured that the sampling frame and

recruitment elements were all inclusive of eligible social worker participants, and to act as a liaison between the cooperating social work agency and me. Informed with the information necessary to the requirements of this research study, the local research participant advocate located an administrative official who either managed or knew all potential social worker participants. The scheduled meeting between the three abovementioned parties achieved four objectives: (a) personally present me and explain the project, (b) answer questions about the project, (c) obtain a letter of cooperation, and (d) collect the email addresses of potential participants for recruitment. Because this project depended on the participation of multileveled social work participants, more time was needed to build an all-inclusive email list of potential participants because the bureaucratic structure did not recognize some who worked in social work roles as social workers. By July 2018 I had received the work email addresses of eight potential participants, an ideal participant number that did not require reduction strategies.

An email containing an introduction, invitation to participate, and a consent form, all in the Bulgarian language, was sent individually to each of the eight participants' work email addresses. The transcultural nature of this project required several unique aspects to this initial email. First, because it was unknown the level of English proficiency, all body and attachment content of the emails were translated into Bulgarian by a local professional to ensure full understanding. Second, the invitation to participate and consent form existed not only as attachments to the introduction email but were also duplicated in the email body itself to ensure that those who could not open attachments encoded by proprietary software had equal access to those who could. Third, since it was

unknown who had access to the work or government email addresses, it was necessary for ensuring confidentiality to instruct the potential participant to reply using their personal email address if they chose to participate by returning the signed consent form. Another aspect unique to this transcultural research project was the need to extend email response time. The local research participant advocate notified me that several participants were vacationing and had no internet access. Furthermore, I discovered that their vacations might easily encompass 30 days or more. Therefore, to ensure that all participants had an opportunity, the response deadlines became extended and fluid.

The six participants were sent an email to their self-provided personal email addresses containing a thank you for participation, instructions on how to participate, and the interview protocol written in the Bulgarian language (see Appendix A), both as an attachment and as HTML text in the email body. The response rate achieved 100% on 09/19/2018. An email was sent out 2 days later explaining that the second email in the exchange would follow the completion of the data analysis process. I sent to each participant the second interview exchange email containing the deidentified responses, less the demographic data, and the two reflections questions (see the lower part of Appendix A). Four responses were received as expected. The other two participants indicated to the local research participant advocate that they were unavailable to respond due to planned extended vacations. After completion of the analysis process, I sent to the six participants a third interview exchange email with a 1-day response request containing the study findings as a verification mechanism. On the last day for data

collection for this study, I sent to each of the six participants a thank you letter email containing an electronic voucher to a local restaurant.

The following data analysis techniques and processes used solely the translated raw data from the six participants who engaged in the email interview exchange. Like the data collection process, transcultural research also influenced the process components of the data analysis. Since translation itself is a form of interpretation that can substantially impact data consistency, accuracy, and outcome, it is also a vital component of the data preparation process (van Nes, Abma, Jonsson, & Deeg, 2010). This is especially significant in research methodologies, such as the email interview exchange, where data collection and data analyses are cyclically intertwined, (Heikkinen, Huttunen, Syrjala, & Pesonen, 2012; McNiff, 2016). In addition to providing a detailed summary of the data analysis and data validation procedures, the following section also addresses the discovered limitations and problems associated with the ascribed data analysis techniques.

Data Analysis Techniques

The originally planned data collection period for this study was 30 days since participant total time burden for the combined stages was estimated to be no more than 5 hours. However, due to factors such as extended vacation times without communication means and the lack of technology in the home prevented timely participant responses, the total data collection time doubled to slightly more than two months. However, this accommodation fostered very good recruitment and initial email interview exchange participation rates, 75% and 100%, respectively. The secondary and tertiary response

rates were 66.67% and 50%, respectively, but those who did not respond to the member checking email indicated that they were not available to respond for another month. When compared to a focus group modality of data collection, the participation percentages for this study were considered exceptional (see McNiff, 2016). Applying a discussion by Kaner (2014) stressing that focus group attendance does not necessarily imply participation or contribution towards consensus due to lack of individual input, the participation in the email interview exchange is tangibly the response to the email itself. Therefore, all attendees of the email interview exchange worked together towards consensus, learned from each other, and were equal partners in this project; hallmarks of good action research that are often difficult to attain and maintain throughout the project (see McNiff, 2016).

Patterned by the discussion of Irvine et al. (2007) that transcultural research conducted in participant language other than native could achieve equally high rigor if careful, innovative, and preplanned methods were employed, I used a combination of mechanical and human mechanisms to ensure the highest achievement level of analysis and interpretation within the logistical limits. This strategy aimed to establish internal validity, credibility, and trustworthiness; components of defensible rigor (Irvine et al., 2007; McNiff, 2016). The procedures used in this strategy are as follows. After email receipt of each of the six initial email interview exchanges, which consisted of five demographic questions, nine open-ended problem identification questions, and five open-ended problem resolution questions, the data (email body content or attachment) was detached from the individual emails and saved to a password secured and encrypted

individual word processor file with an unlinked numerical identifier. Following the containment of the six responses into the six files, the collective responses to each question were randomly assigned to a bulleted line below each respective question of the email interview protocol (see Appendix A in Bulgarian language). After the master file was populated (a completed email interview protocol), the text was batch processed through a professional version of Paralink translation software into plain English language. I then placed the mechanical translations of each response in parallel with the corresponding Bulgarian response contained in the master file. I carefully read each English response and made notations where I suspected something to be incorrect, or identifiers were present that could identify a participant or their response. These handwritten notations assisted the translator and me for reflective purposes. Dually purposeful from the task of reading and notating, I became familiar with the data after the first initial reading – essentially bringing me into the email interview exchange partnership (see Onwuegbuzie & Byers, 2014).

The local translator was tasked to correct and clarify the English text received the master file containing the first three sections of the email interview protocol, associated responses, and handwritten notations in a printed parallel language format. The written and nonaggregate format of the data given to the translator achieved several items of importance for the project. First, it prevented the usage of another mechanical translation means. Second, the nonaggregate format of the response data reduced the propensity for analytical injection by the translator (see Squires, 2009; Temple & Young, 2004). Third, the hand written notes were indications to the translator where the literal translation could

be correct, but cultural meaning did not transmit into something meaningful for me, an often-overlooked caveat of transcultural research to be considered and overcome (see Irvine et al., 2007). Following the return of the master file from the translator, I read the data and made further notations in areas that needed clarification. The reciprocal exchange occurred three times before a final English text, and deidentified Bulgarian text emerged. Each of the six participants received the deidentified full email interview protocol with associated data in the Bulgarian language (see Appendix A) for their review, reflection, and response. During this process, I began to analyze the demographic and question response data contained within the final English email interview exchange protocol less the reflection questions.

Analytical Model Rationale

Coding is a traditional model developed for analyzing data from qualitative research (Onwuegbuzie & Byers, 2014). Since the purpose of coding is to organize and properly interpret data that produces purposeful outcome, it is important to well match the coding model to the needs and characteristics of the project as a whole, to ensure the highest level of rigor is attained (Maher, Hadfield, Hutchings, & de Eyto, 2018). Coding models can be traditional, such as using notes and codebooks, or technologically enhanced through algorithms and software, such as the computer program NVivo. Through their research using NVivo, Bazeley and Jackson (2013) demonstrated its ability to promote a more rigorous analysis when in the hands of a competent researcher. Factors in this study unique to traditional qualitative research (e.g., transcultural elements, action research methodology, and the email interview exchange process) were

influential in my decision to follow the concept by Maher, Hadfield, Hutchings, and de Eyto that combined traditional qualitative analytical models with the modern NVivo software to achieve the highest degree of rigor possible. The usage of the digital tool NVivo to analyze translated text more precisely coded the syntax (see Bazeley & Jackson, 2013) - it produced more codes that were later manually scrutinized by the referenced text to merge into another code ultimately or to establish a theme. Bazeley and Jackson found that in some types of research the usage of digital tools alone blunted the depth of learning, the context of understanding, and interaction of the researcher to the study components. Since this project was action-based research and I was in the dual role as researcher and as participant, any elements that hindered or degraded the qualities of the reciprocal relationship were not acceptable. Therefore, NVivo supplemented by traditional methods of analysis were used as the model to analyze and interpret the data collected by this project.

A univariate analysis rather than coding was used to describe the participant group by their responses to the demographic portion of the initial email interview protocol. Although the data from the demographic section did contain detailed answers (expansions of the questions into subtopics) from some of the participants, content was derived from the text to match the other participant response type to ensure consistency in the descriptive findings. This process used the creation of analytic memos to parse the content (Elo et al., 2014), rather than coding analytics. The below example illustrates how the analytic memo process was used to parse an indirect response into a response

compatible with the majority and expectations of the question. **M** is a reference to the analytic memo.

Q: ... social work roles and responsibilities?

A: ... being a good manager.... building a solid team.

M: Role = Manager; Responsibility = Organizational management

A: ... director of a facility providing social services... multiple tasks of various kind... bear full responsibility.

M: Role = Manager; Responsibility = Organizational leadership

The above example produced one type of role and two types of responsibility that would not have been reported with either a univariate analysis or NVivo analysis because labels, such as manager or organizational, cannot be derived from descriptive phrases.

Additionally, the context of social work components, such as role and responsibility, are unique to the profession, and further justified the application of the manual analytical memo process to classify the participants into professionally recognized categories based on how social work values are delivered to the rural Bulgarian elderly (see McDonough & Davitt, 2013). Furthermore, this rationale was aligned with the systems-based framework as a tool to better understand the composition and workings of the Bulgarian social work structure.

Hybrid Analytical Model

The above-mentioned model was applied to the deidentified, cleaned, and clarified English text of the data to automatically extract nodes and associated codes, which loosely represented separate themes. The algorithms of NVivo effectually

completed much of the scissor and sort strategy, a manual task, discussed by Stewart and Shamdasani (2014). After the NVivo process concluded, I reviewed the data cut from thematic inclusion to ensure the conservation of relative data and meaning. Although the algorithm performed well, I manually removed some codes and nodes from the assembled codebook (see Appendix B) because they were not pertinent to the study subject. I further manually reduced the analytical output through merging to develop themes that corresponded to questions contained under each email interview protocol heading, (a) problem identification, (b) problem resolution, and (c) reflection, to answer the research questions, and to lay the foundation for the development of future actions to ultimately mitigate the elder crisis in Bulgaria.

Secondarily, a built in NVivo feature produced a sentiment analysis of the participants' responses to each node. Sentiment analysis is a complex analytical computation of a text string that determines the emotion of opinion to classify the viewpoint, often a polarity of positive and negative (Kiritchenko, Zhu, & Mohammad, 2014). Kiritchenko, Zhu, and Mohammad further added that these sentiment classifications of subjects often reflect what is actually occurring outside of the text, and further aids validation of the qualitative themes. Therefore, sentiment analysis was an added benefit to this study that enhanced elements of rigor difficult to tangibly observe and demonstrated the relationship between the problem, population, education, sociohistorical aspects, and social work values. The combined rendering of the hybrid analytical model used for this project provided me a robust and comprehensive understanding of the problem in context to build concisely aligned actions with the

population and the problem in crisis. This informed foundation resulted from the action research processes that diligently investigated the components, intersections, and their influences: the participants, the rural Bulgarian elder population, the overarching social work and larger systems, the definition of successful aging for rural Bulgarian elders, intergenerational caregiving, and disabilities.

Validation Model

One of the major critiques towards action research methodology is the questionable ability to effectively demonstratively validate what was investigated through unequivocal levels of credibility and trustworthiness (Heikkinen, Huttunen, Syrjala, & Pesonen, 2012). Irvine et al. (2007) explained the need to achieve high rigor levels throughout the systematic inquiry process, which are established by the quality of the individual components and their associated universal research attributes: (a) credibility = internal validity, (b) transferability = external validity, (c) dependability = reliability, and (d) conformability = objectivity. Authentic action research demands that validation is integrative, embedded through the procedure or design strategy of the processes throughout the life of the project rather than a singular task (McNiff, 2016). The added dimension of transcultural research placed an extra burden on one component, the achievement of credibility, that if overcome through principles culturally responsive to the population, would bolster overall rigor and promote a high degree of trustworthiness during the research processes and after (see McNiff, 2016; NASW, 2017; Stringer, 2013). To best operationalize this rationale, five validation principles introduced by Heikkinen, Huttunen, Syrjala, and Pesonen (2012): (a) historical continuity, (b) reflexivity, (c)

dialectics, (d) workability and ethics, and (e) evocativeness, guided the research process actions of triangulation, member checking, and participant debriefing. Process components existent in intrinsic and extrinsic modalities succinctly presented by McNiff and Whitehead (2010) as a combination of personal and social validation, which were well matched by modality and type to the properties of this transcultural action research project.

Validation Procedures

The ethical accommodations made to the research design due to the transcultural nature of the project created passive or intrinsic types of validation that are equally important as planned processes to mention since they can be of equal beneficence to the establishment of rigor and overall trustworthiness (Heikkinen, Huttunen, Syrjala, & Pesonen, 2012; McNiff, 2016). Although aimed at data collection and analytical methods to validate findings, validation methods of other operations precursor to data operations ensure that unique characteristics and perspective of the transcultural overlay inform the research questions, purpose, and chosen theoretical frameworks (Irvine et al., 2007); a guiding principle of any social work intervention type (NASW, 2017). Mentioned as a principle by Heikkinen, Huttunen, Syrjala, and Pesonen, historical continuity, the in depth literature review and associated synthesis with local information often in a language other than English acted as a type of triangulation between Western literature, localized literature and information, and myself as the foreign researcher. Without this important element, it would be questionable whether the ensuing research processes were aligned and purposeful to the local problem and population.

Another example of inherent triangulation, a principle of dialectics (Heikkinen, Huttunen, Syrjala, & Pesonen, 2012), that occurred before and during the data collection and analysis processes was the utilization of the local translator who translated email correspondence, email interview protocol questions, and participant responses. Because the translator was not a social worker or a subject matter expert on successful aging but was a local Bulgarian who shared the cultural context with the social worker participants and the rural elderly population, the translator's learning approach to the subject through the data was an important mechanism of conveying accuracy in meaning through the translated texts. Regarding this type of translator, Al-Amer, Ramjan, Glew, Darwish, and Salamonsen (2015) and van Nes, Abma, Jonsson, and Deeg (2010) described an essential role beyond translation as an interpretive liaison between the participants and the researcher who ensured that the data was clear and concise between the transcultural divide. Furthermore, a principle of reflexivity, that is a form of inherent triangulation is the composition of the participant group itself; multileveled professionals who work in social work roles with the rural Bulgarian elderly population. As McNiff (2016) described, participants as learners from each other's perspectives of the social issue components, coupled with me as a participant, formed a triangle of validation technique that fostered trust through credibility (internal validity), which bolstered overall rigor and established authenticity in the cyclical process of action research (see Stringer, 2013).

Applying two validation principles discussed by Heikkinen, Huttunen, Syrjala, and Pesonen (2012) for action research, the principle of dialectics and principle of workability and ethics, I employed two different processes of member checking. One of

these was present in the translation process of the participant responses. Simply sending the raw data to a translator for my subsequent analysis in the English language would have effectually disregarded the interpretive nature of language translation, which could have ultimately begun a chain of a threat to the internal validity of the project (see Irvine et al., 2007). To counter this possibility and to strengthen the data preparation process beyond the normal processes of a non-transcultural project, I performed the following steps for each participant response set.

First, I translated each participant's response using a professional grade of Paralink software to generate an English text mechanically. The assembly of the English text and the original Bulgarian responses were in a parallel format, (i.e., a line by line translation in preparation for the translator). Lastly, after reading the English text, I made notations where things did not make sense and delivered the notated transcript to the translator. Guided by Irvine et al. (2007), the constructive nature of the transcript compelled the translator to use human means to translate, use a back translation process to clarify and correct the English text, and translate by line rather than aggregately (see Squires, 2009; Temple & Young, 2004). In a dialectic sense, these combined procedures accurately reflected the voices of the participants, projected authenticity in the data, and granted the opportunity for me to gain deep insight. All of these elements are demonstrative of a trusting relationship necessary for ethically grounded and successful action research outcome (McNiff, 2016; NASW, 2017).

The second type of member checking premised on workability and ethics (Heikkinen, Huttunen, Syrjala, & Pesonen, 2012), was the feedback responses of the

participants. The first type of participant feedback demonstrative of this was member checking by reading participant responses in a randomized collective of responses to ensure that the data cleaning process did not distort the intended response, or by changing their response based on a new perspective taken of the initial question. McNiff (2016) and Onwuegbuzie and Byers (2014), and Stringer (2013) describe these process components of member checking as an integrative strategy of good action research to correct errors and to tangibly witness the change process individually and collectively. The second example of participant member checking occurred in two parts. First was their review of the deidentified and randomly assembled collective responses to each question of the email interview exchange protocol, and their associated responses to the two reflection questions that captured their feedback (see lower portion of Appendix A), of which four out of the six submitted a written response. This process, through its operational characteristics of ethical transparency that created a safe workplace to exchange information (see Heikkinen, Huttunen, Syrjala, & Pesonen, 2012), demonstrated that this research was able to generate and maintain a platform that hosted purposeful discussion, fostered a change process, and facilitated consensus between the multileveled social worker participants.

Further validating the authentic commitment of the participants during the information exchange process was the level of sentiment change – a reflection of how the learning process of information exchange (discussion) fostered the conjoining of perspective to critically examine and respond (Lin et al., 2013) to the aging crisis of rural Bulgarian elders. The second and final member checking component of which everyone

validated without comment was the presentation of findings email to the participants, less the demographic portion. The presentation of findings were essentially the analytically derived themes that answered the components of the research questions: What are Bulgarian social workers' perceptions and expectations related to successful aging for Bulgarian elders?" and "What are the barriers identified by Bulgarian social workers that inhibit successful aging for Bulgarian elders?". The conclusion of the validation process occurred since there were no additional inductively derived questions added to the final email exchange for clarification and validation, (see McNiff, 2016; Stringer, 2013). Therefore, the findings were a credible, trustworthy, and accurate representation of the problem and participants of this transcultural research project. The final commitment to the participants, the research project executive summary, reflects their collective voice.

Limitations and Problems Encountered

The cyclical nature of action research, which generates new data supportive of new actions requires that validation is a continuous process and not a onetime event (Heikkinen, Huttunen, Syrjala, & Pesonen, 2012; McNiff, 2016), especially in an exploratory framework that seeks to understand systemically complex evolving phenomena to develop well-matched solutions (Wilkinson, 2017). The perceived lack of concreteness in variables conjoined with the dual and more roles of the researcher as a participant is fodder for critics who question the validity of an action research study such as this (see Heikkinen, Huttunen, Syrjala, & Pesonen, 2012). For this reason, the establishment and defense of high vigor were needed to overcome this threat, not only to the research project but to the participants and the social problem. As Irvine et al. (2007)

and Stringer (2013) point out, the foundation of research rigor can exist in varying levels of credibility, transferability, dependability, and conformability; equitable to internal validity, external validity, reliability, and objectivity, respectively. Irvine et al. and Stringer further assert that the key to establishing high rigor is not a certain quantity, but rather the quality. Because my social work values acknowledged the ethical burdens of a transcultural research project, it influenced how I selected and designed components of this research to build a high level of credibility. More succinctly, the failure to overcome low credibility by the achievement of high levels of rigor in the other three above mentioned components would have jeopardized the validity of the action research process to reflect the stakeholders' voice accurately.

Because I was not fluent in the Bulgarian language and would have required an interpreter as a co facilitator in a focus group data collection method, the synchronous nature of the discussion would have severely limited my participation as a facilitator and member of the decision making team. Although the shift from focus groups to the asynchronous email interview exchange process eliminated this concern by increasing the rigor of the design (Wach, 2015) by more tightly controlling the instrumentation, it did mute the nonverbal actions of the participants. As a social worker who knows and understands the equal importance of nonverbal data to recorded statements, it was necessary to partially offset this limitation by most carefully crafting the email interview protocol in translated format to capture feelings and sentiment that could be measured (see Onwuegbuzie & Byers, 2014). In summary, the transcultural aspect of this research project in a social work context presented ethical, cultural, and operational concerns that

were difficult to overcome, but the payoff of the strategic design component was a project that was highly credible; the most important principle of action research rigor determination, its trustworthiness (McNiff, 2016; Stringer, 2013).

Findings

The data set collected for this project emanated from email responses to 21 open-ended questions contained in a four-part email interview protocol (see Appendix A): (a) demographics - five questions, (b) problem definition - nine questions, (c) problem resolution - five questions, and (d) reflection - two questions. The initial participant exchange contained the demographic, problem definition, and problem resolution sections. The subsequent email exchange contained the collective responses from the problem definition and resolution sections in addition to the newly posed reflection questions.

Demographics

The demographic component of the email interview protocol queried the social worker participants in an exploratory manner to gain a better understanding of the social work system structure, (i.e., to understand how and at what level the participants interacted with the rural elderly population) and to understand the context of their insight by considering their education and time in service as a social worker. Although the demographic questions sought a numerical or label response type, some of the responses included sub topic expansions of the questions that provided insight into character and context.

Noteworthy and important to the contextual understanding of the problem definition/resolution, and reflection findings are the following demographical observations that were intended to paint a portrait of the social worker as an action research participant, rather than participant characteristics. The examination of Figure 1, years in service as a social worker, indicated a median age of 12 years in service, of which two participants had 25 years or more.



Figure 1. Bar graph showing the number of years as a social worker by participant group. Note: The work history indicated by one participant indicated the occurrence of short but unknown breaks.

The time working with the elderly as depicted in Figure 2, indicated a median of 72% and a lowest range data point above 50% - the majority of time each participant spent within the scope of practice involved interactions with the elderly population.

generation now classified as elderly and in crisis. Furthermore, the two veteran social workers witnessed the systemic changes caused by sociohistorical events and would likely be more informed to understand the current social problem from the perspective of a rural Bulgarian elder.

The findings visualized by Figure 3, educational degree and level also added a significant layer of validity to the data.

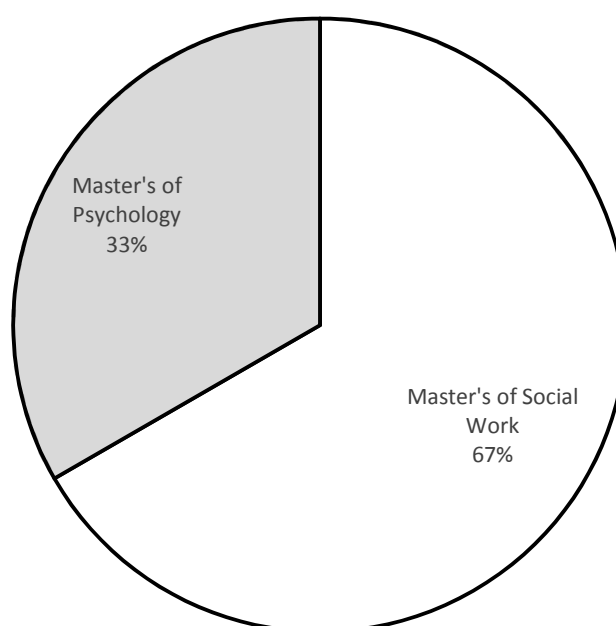


Figure 3. Pie chart showing educational degree and level. Note: One participant had 3 Master's degrees. One participant with a Master of Psychology had a Bachelor of Social Work.

Because all six participants held a master's degree in either social work or psychology, they likely had knowledge of multiple theoretical frameworks to apply in their social work practice settings, understood ethical standards of practice, and understood the role and importance of good research. Additionally, the four participants who held degrees in

social work likely practiced within a social work value paradigm; an architecture sensitive and responsive to the specific diversity of the individual, and the innate drive to make positive social change for the client and larger.

The broad spectrum of social work job titles illustrated in Figure 4 represented the micro-, mezzo-, and macrolevels of social work intervention.

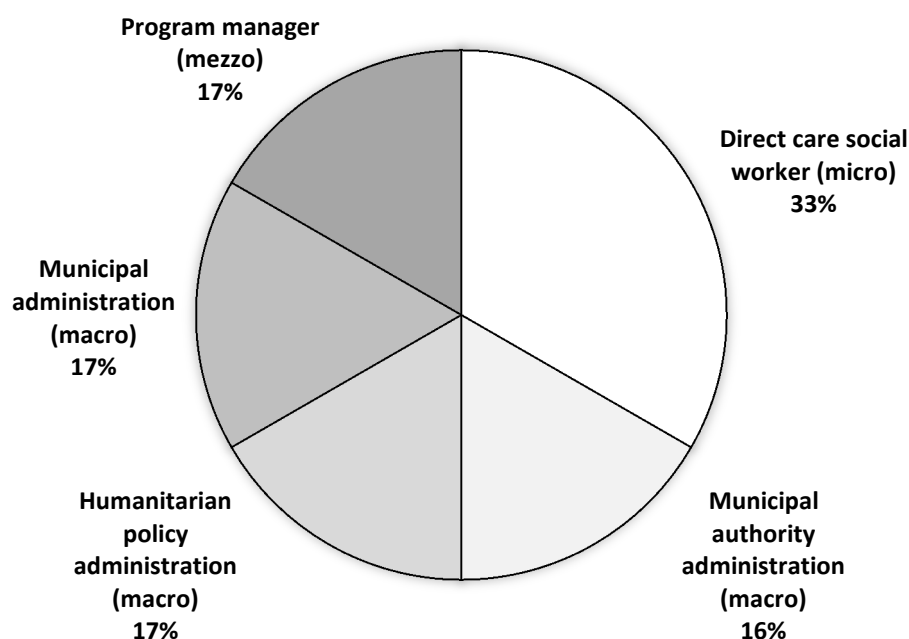


Figure 4. Pie chart showing social work job title. Note: Data term “social worker” = direct care.

The learning aspect of the email interview exchange provided a perspective of each other’s interactions with the elderly population, which may have otherwise remained undiscovered due to the disunified structure of the Bulgarian social work system.

Because the participant group achieved this high level of diversity representative of the social work structure, saturation further bolstered rigor, (i.e., the collective voice was a valid, accurate, and trustworthy representation of the stakeholders and the problem).

Further delineating participant interactions within the Bulgarian social work structure when working with the elderly, Figure 5 and 6, NASW roles and responsibilities, respectively, indicated the levels and types of interventions associated with the social worker participants.

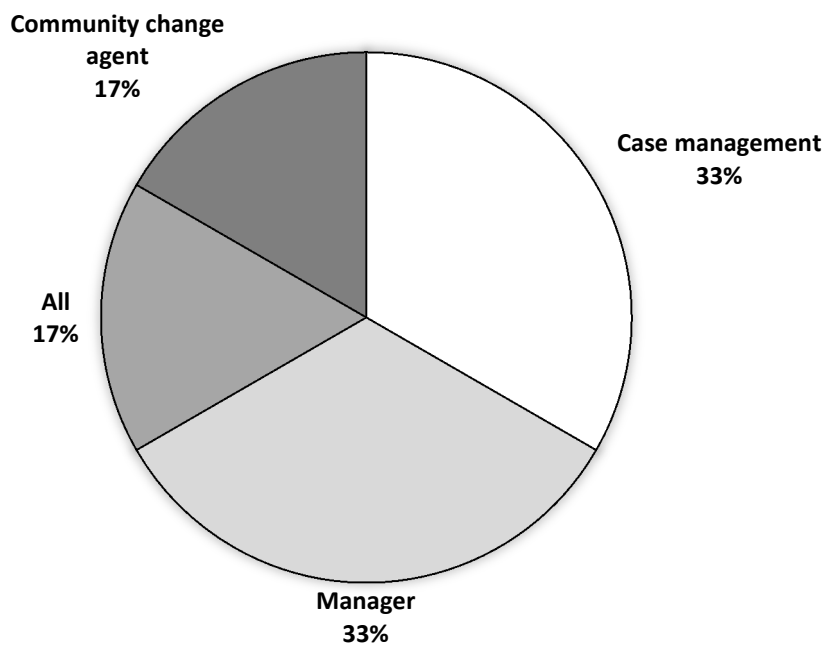


Figure 5. Pie chart showing NASW roles. Note: Data converted to NASW roles.

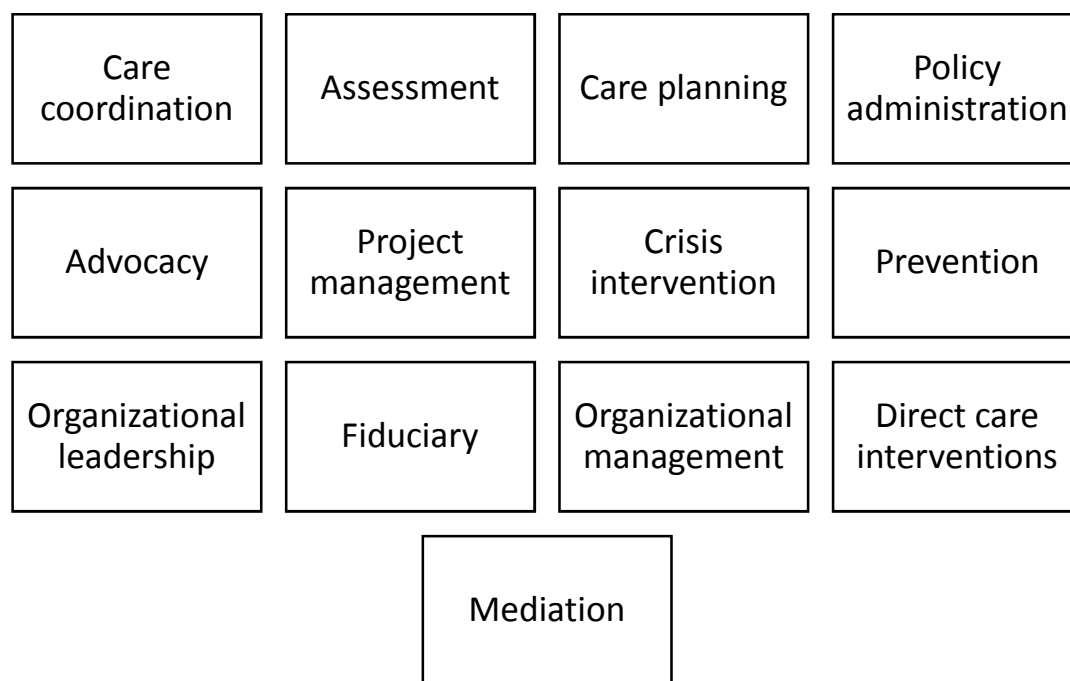


Figure 6. List of responsibilities. Note: Converted to traditional responsibilities.

The respective data indicated several intervention types for each social work role, and several participants reported that roles and responsibilities often overlapped, (i.e., they performed interventions outside of their traditional roles). For example, one participant indicated that direct care interventions and accounting/budget management were part of their case management role. The diversity and overlapping responsibilities within the traditional roles increased the comprehensive level of understanding of the participants and was likely a factor contributable to the relatively short time of reaching consensus.

Although the above-mentioned demographic data and associated analyses demonstrated the participants were indeed excellent candidates for this research study, the data excluded from the six charts and graphs were still important to consider and include in the findings. For this study, the following extraneous qualitative data provided

in the demographic responses were descriptors of the character and voice of the individual as a social worker not capturable through numerical or labeled responses. To better present this type of important qualitative data as individual components of the collective voice, narrative presentations provided the means to demonstrate the contributions of each participant. Each participant was assigned a pseudonym to ensure privacy through anonymity: P1 was Jordan; P2 was Danika; P3 was Petka; P4 was Kyrill; P5 was Alex; and P6 was Boriانا.

Three demographic topics, job title, roles and responsibilities, and percentage of time working with the elderly, elicited additional response data from four participants. For example, all participants provided a labeled response to the question “What is your job title?”, but two participants further validated their level of commitment to the named job title: Danika answered that she was a social worker (translated to a direct care worker) and added, “after 35 years, I think my calling is being a social worker”, and Jordan responded that he worked in the humanitarian policy department and disclosed, “he was a junior expert.” Regardless of being a veteran expert or a junior expert, Danika and Jordan demonstrated that their jobs were more than a title – it was the full commitment to a career at an expert level. Regarding the question, “What are your social work roles and responsibilities?”, Petka further described her role as a manager responsible for case management by writing, “I implement multiple tasks of a various kind on a daily basis, but it does not keep me from bearing full responsibility for all people sheltered with us, as well as for the service staff.” Through the extension of social work values through her subordinates, Petka affirmed her desire as a manager to remain

interactive with clients to ensure the output, and more importantly, the outcome of the intervention addressed the needs of the clients. Kyrill, who registered a response of “never counted” on Figure 2 as a response to the question, “What percent of your time is spent working directly or indirectly with the elderly?”, explained his rationale:

“As a person who has worked for so many years in the social service area, I know one thing by now: the social worker is like a doctor, he does not take a holiday, So I have never kept count on the time I spend in working with one or another social group, nor intend to do in future.”

A closer inspection of his statement demonstrated his knowledge of and responsiveness to the encompassing nature and demands of social work, respectively.

Problem Analysis

Cleaned and prepared data from nine open-ended problem identification and five open-ended problem resolution questions were initially analyzed by the automatic coding feature of the NVivo 12.0 computer program to generate a list of 14 nodes (themes), 52 supporting codes, and 102 data references (see Appendix B for NVivo automatic coding analysis). Since many of the interrelated questions were purposely intertwined to fully investigate the problem and elicit a solution(s), the answers were expected to be entangled likewise. Although the algorithms in NVivo performed surprisingly well with the automatic coding data analysis, there were too many codes and too many overlapping references that were not aligned or supportive of the theme. Therefore, a manual process of reviewing each reference for its mechanically assigned code, and then parsing process to add, delete, or merge codes with its associated references was performed to produce a

smaller-themed and more concise codebook containing nine nodes (themes), 60 codes (descriptors), and 134 references (see Appendix C for codebook) that more descriptively and accurately answered the two research questions - a highly credible collective voice that provided an informed pathway for positive and sustainable social change interventions to mitigate the aging crisis in Bulgaria.

The next three sections detail the findings for each component of the research questions regarding successful aging, perceptions, expectations, and barriers. The first section, perceptions, includes an example of the analytical processes for codebook development to demonstrate how to answer the research component. Since the other two research question components used the same process, the analysis began after the codebook development.

Perceptions. Specific references to “perceptions” in the codebook (see Appendix C) were aligned with all nine nodes through their coded-derived descriptors to be negative: (a) care – inadequate, not needs matched, not easy access, and poor quality, (b) community – population loss, poverty, lack of care, and lack of services, (c) elderly people – poor attitude, lack of community, lack of home environment, and disabled, (d) institution – not easy access, not home environment, and poor quality, (e) life – poor attitude, negatively changed, not cheerful, lack of community, lack of home environment, and not successful, (f) needs – not needs matched, (g) services – poor attitude, not easy access, lack of home environment, inadequate, not needs matched, and poor quality, (h) situation – poor attitude, negatively changed life, desperation, disabled, lack of home

environment, isolation, loneliness, and poverty, (i) system – poor attitude, lack of funding, low pension, lack of services, poor social policy, and convoluted structure.

Many of the nodes (see Appendix B for NVivo automatic coding analysis) were self explanatory as thematically relative, but others with a high number of references and low code count, such as “situation,” needed further analysis as described above.

Otherwise, a vague and incompetent description of the successful aging situation would likely result if the findings rested solely on the automatic analysis that rendered only two descriptors, loneliness, and isolation (see Appendix B). The need for a much richer account of how loneliness and isolation described the successful aging situation emerged.

The following narrative presentation of the automatic coding example of “situation” demonstrated how this process explored the mechanically extracted references (individual responses) in detail to unite the voices into a collective and rich voice that tells a functionally useful story about the successful aging situation. In the example, 12 references representative of the six participants were extracted from 12 different questions out of the available 14 in the problem definition and resolution portions of the email interview protocol. As in the previous demographic section, the same pseudonym convention was used in the following narrative and throughout this paper to demonstrate individual participant input.

Even though the categorization of 11 out of the 12 references linked to the node “situation” as either loneliness or isolation occurred, the participants provided insight that illuminated equally important elements, some of them precursory to the two codes, loneliness, and isolation. For example, when asked, “For the rural elderly you work with,

how would you describe life in old age?”, Borianna responded, “I think their life is tough since their access to medical and health care is limited. Limited or no access to any kind of services or entertainment. Reduced mobility people are entirely deprived of contacts and communication.” Alex provided a response to the question, “What happened that changed life in old age?” that helped explain Borianna’s response by the following statement, “Weakening and gradual loss of physical and cognitive abilities – especially for those living in isolation in the small, depopulating villages.”

Furthermore, the response by Kyrill to the first question introduced cause to Alex’s response by his answer, “Those who are reliant on care feel worse, for the simple reason that there is no one to look after them until their placement in any institutional care would take too long.” The examination of these three responses introduces many elements necessary to understand the situation more fully. First was the issue of health, a vulnerability that emerged from the lack of necessary services and care. This unsupported aspect of aging created a difficult life and daily struggle to survive. Moreover, it seemed that when mobility became compromised, full isolation was inevitable. The second was the depopulation of the villages, which translated to a loss of community and services, and poor infrastructure, such as adequate transportation to other locations that had necessary services. Also, coupled with the population loss was the loss of caregivers. As discussed in the literature review, the children of the elderly, the intergenerational caregivers, attributed to most of the population loss. Third, the mention of “living in isolation” was connected to “life is boring,” “Boring, with limited social contacts,” and “their life is tough, heavy, and boring” through “loneliness” by the

responses from Alex, Danika, Jordan, and Petka, respectively. This concept is important to understand because many individuals can live a lonely life without boredom and still thrive. Responses by Danika and Kyrill hinted that attitudes might reinforce the idea that the drudgery of life in old age makes a boring life. Their responses captured this association, "...it also comes by their own attitude. They had lived most of their adult years in the socialist society, so they believe and are convinced that it is the Republic who owe it to them..." and "In the first place, standing the mere thought of having become old aged, then the poverty, and last, other peoples' casual attitude towards their age."

The above responses suggested that the successful aging situation was lonely and isolated mainly because of unsupported aging due to the lack of services and care from the failed communities. Upon reflection, I pondered why the elderly remained in such an unsupportive environment or did not seek outside services, such as a private caregiver. Danika, Petka, and Borianna all referred to extreme poverty as the reason, "isolation elderly have been forced to live in." Because levels of poverty and feelings of loneliness or isolation are relative to the person, it was important to understand the intensity level of the situation for the elderly who had no means to choose how to live or to adapt successfully. References from various questions indicated a dire condition. Kyrill wrote, "It is bad." Alex answered, "It is a very hard situation." Danika expressed, "Most people feel desperate." Although these descriptions were very strong indicators that successful aging was not occurring, responses by Jordan and Petka provided the most direct message, "I doubt if we could consider successful the aging in Bulgaria at all" and "The

status of the elderly is “no exit” or “there is no light at the end of the tunnel”, respectively. Furthermore, Alex captured the hopelessness of the situation by quoting his client, “One of our service users told me, ‘I’m old and sick, but loneliness is my burden.’”

Indeed, each of the 12 references provides insight into the successful aging situation, (i.e., the participant’s perception of successful present day aging) but more importantly, many of the responses reflected problem cause and resolution. Some of these references already existed in other nodes, and some were added to or merged with other nodes to develop and contextualize the existing data. For example, the reference to isolation indicated above also has reference to “small, depopulating villages” and “health-related limitations.” Therefore, the node “situation,” which had two codes and 12 references assigned from the mechanical analysis (see Appendix B), now has 11 codes and 34 references (see Appendix C) as a result of the secondary analytical process demonstrated above. Coalescing the directly impactful attributes, isolation, loneliness, poverty, and health-related limitations, echo the responses by Jordan and Petka, “I doubt if we could consider successful the aging in Bulgaria at all.” and “The status of the elderly is “no exit” or “there is no light at the end of the tunnel.” Concisely, the successful aging situation is a failure to thrive and therefore perceived by the Bulgarian social workers that successful aging for rural Bulgarian elders is nonexistent. The collective voice did not refer to successful aging as the adaptation to something less than an attainable successful aging expectation, but rather indicated that aging in the present state was unsuccessful, a failure to thrive, and definitively a crisis.

As a supplement to the mechanical output of NVivo that can mute individual voice by its coalescence into code, it was important to consider other references that matched the findings generated by the NVivo processes. In addition to providing richer context to the research question answers, the discovery and inclusion of supplementary responses provided another element of validation to bolster components of rigor. The following narrative captures important data references excluded from the above demonstrated analytical processes and further supports that successful aging is nonexistent.

Although the discussion of intergenerational caregiving occurred in the above narrative, additional references clarified and expanded the important association with successful aging. Regarding a question that asked about the relationship between successful aging and intergenerational caregiving, Boriana responded, “Elderly cannot cope with daily activities like medical appointments, transport, dealing with public institutions, etc. without support from their children and relatives.” Analysis of this response validated the absence, need, and failure to replace intergenerational caregiving, and indicated that adaptation through resiliency was not achievable. Also demonstrative of the intergenerational caregiving disruption, Jordan added, “(nowadays) families visit them when they could and only check them by phone calls.” Petka’s response, “Elderly feel loved and important when cared for in the home or as close as possible to the home environment. It gives them strength and courage to live” established a relationship between purpose in life and intergenerational caregiving, (i.e., a family structural component that provides mutual intergenerational purpose). Additionally, her response

provided another reason besides poverty that explained why the rural elderly do not leave their isolated communities – the elders need a home environment structure to survive.

Expectations. Like the operationalization of “perceptions” above, “expectations” were aligned with the same all nine nodes contained within the codebook (see Appendix C) through their coded-derived descriptors, but inversely reported to be positive: (a) care – community based, easy access, home environment, improving, institutional, needs matched, and quality, (b) community – care, life, and services, (c) elderly people – attitude, autonomy, community, and home environment, (d) institution – easy access, and quality, (e) life – attitude, cheerful, community, everyday, faith, home environment, peaceful, and successful, (f) needs – medication, needs matched, and specific, (g) services – attitude, autonomy, community, easy access, home environment, improving, needs matched, and quality, (h) situation – attitude, community, faith, home environment, and resiliency, (i) system – attitude, funding, home environment, adequate pension, and services.

Therefore, the positive aspects of the above listed nine codes expressed through the associated references provided insight into the expectations of successful aging. After consideration of the “perception” findings, I surmised that a majority of “expectations” were some level above the currently reported perceptions. Therefore, it was important to discover not only the expectations but also the characteristics, such as attainability. The following narrative presentation of the six participants’ responses achieved this and provided the information necessary to define the research question component “expectations” of successful aging.

To elicit a direct and comparative response from the participants, the question, “How life in old age should be?” was placed directly after the question regarding perceptions. The most common theme, the ability to live positively, was echoed from four participants, Jordan, Danika, Kyrill, and Alex, by their respective statements: “It should be decent, quiet, cheerful.”; “It should be quiet, with easy access to health care, with better social network and more colorful everyday life.”; “...it should be carefree, elderly people should receive the best possible care, so they could feel good in the sunset of their life.”; and “... life cheerful and peaceful, to be surrounded by family and friends.” Many of these adjectives described a life opposite of boredom. However, the attainment of such a feeling must be considered. Referring to the prior analysis of perception, I understood the linked relationship of boredom, loneliness, and isolation required that loneliness and isolation must be first be mitigated. Alex’s response connected being cheerful and peaceful to being with family. This concept was important since it reinforced the strong association of intergenerational caregiving to the root of the crisis. Highlighting another aspect of intergenerational caregiving as discussed in the literature section, the need for intergenerational transfer, (i.e., a capstone of accomplishment) Petka stated, “If he is happy with what has been already accomplished in his life, with his faith in himself and God.” Simply stated, the elderly who suffer from boredom stemming from loneliness and isolation have not fully achieved self actualization through generativity. This ideology relates to one type of purpose in life, but other purposes were mentioned as a necessary expectation to achieve. Boriana wrote most extensively about this in two different references, “...when he feels useful and

productive with society.” and “...the opportunity to be respected, opportunity to be helpful to the community by your knowledge and skills, opportunity to be part of community life, financial opportunities.” This understanding that purpose in life is a result of some type of action performed by the elderly individual validated the previously discussed continuity theory in aging concept – successful aging is a life stage continuum. Different from the first purpose mentioned, the need to productively interact with the community is equally important but difficult with a compromised community. Dovetailed in her response was the aspect of financial matters and an association between autonomy and attitude. Kyrill, Petka, Danika, and Jordan wrote, “... should have a decent pension, which allows you to live normally.”, “... should be financially secure...adequate services should be available at home environment...and access to autonomy.”, “... independence and autonomy.”, and “... should receive better support and more attention from younger people.” These statements suggest several things. First, if younger people, who comprise society’s decision makers, had a better attitude towards the elderly population, they would support them better through increases in pensions and services. Second, the elderly suggested they could cope better with their situation if they had the means to do so.

The analysis of “expectations” yielded several important insights to this study. First, the individual voices provided a detailed list and rationale of successful aging expectations. Most importantly was the ability to feel positive (not bored), to be purposeful to self, family, and community, to be connected with an intergenerational family structure, and to have adequate resources to cope. The collective voice produced

an understanding that these factors were associated with and were currently unattainable because of systemic barriers.

Barriers. The final member of the tripartite research question components, “barriers”, drew negatively from the descriptors contained in the other two members, “perceptions” and “expectations”, but was referenced by all nine nodes in the codebook (see Appendix C): (a) care – lack of community, not easy access, not home environment, not improving, inadequate, not needs matched, and poor quality, (b) community – lack of care, bad life, population loss, poverty, lack of care, and lack of services, (c) elderly people – poor attitude, lack of community, lack of home environment, and disabled, (d) institution – not easy access, not home environment, and poor quality, (e) life – poor attitude, negatively changed, lack of community, and lack of home environment, (f) needs – necessary medication, not matched, and specific, (g) services – poor attitude, not easy access, lack of home environment, lack of community, inadequate, not needs matched, and poor quality, (h) situation – poor attitude, negatively changed life, disabled, lack of home environment, isolation, loneliness, and poverty, (i) system – poor attitude, lack of funding, lack of home environment, low pension, lack of services, poor social policy, and convoluted structure.

Since many of the barriers to successful aging were discovered through the analyses of “perceptions” and “expectations”, and classified as a systemic type, it was important to analyze other areas of the email interview protocol (see Appendix A) that directly and indirectly addressed barriers within the sphere of Bulgarian social work practice influence. Although it is important to recognize all barriers, the goal of action

research is not to make a resolution about something outside of intervention reach (e.g., out migration) but rather to develop actions that eliminate or provide a pathway around tangible barriers that provide relief from the crisis (see McNiff, 2016; Stringer, 2013). Also, when considering barriers, it was important to envision the individual and combined intervention characteristics of the micro-, mezzo-, and macrolevels of Bulgarian social work practice.

Two direct questions, “What happened that changed life in old age” and “What things are keeping life in old age from what they should be?” provided data that echoed what was previously discovered: economic and demographic situation of Bulgaria, low pensions, depopulation of villages, loss of intergenerational caregivers, lack of local services, loss of community, and poor attitude towards the welfare of the elderly population. I recognized these issues as large and overarching barriers that were contextually important, but further investigation into the specific code references yielded more purposeful information that potentially applied to social work practice solutions. For example, references to care and services emerged as barriers to the elderly and the Bulgarian social work structure. Petka and Kyrill commented, “services are not matched with their needs” and “community services are being offered, such as daycare centers and centers for social rehab, but they do not meet the needs of the users.” Furthermore, Alex noted that regulations limited access to services, “only one specialist per month could be seen.” Further, if the individual had multiple problems requiring specialist care, the lack of affordable or free transportation to these specialists would make it impossible for most. These responses about service issues that form a systemic and hard barrier to the elderly

are collectively representative of the multilevel Bulgarian social work structure: proper and aligned service delivery is a microresponsibility; accessibility and availability to the service is a mezzoresponsibility; and funding appropriation is a macroresponsibility.

A deeper examination of references linked to problem resolution provided several additional barriers that need to be discussed. One of these being related to services, the need for services in the home environment. Boriana, Jordan, and Petka wrote, "...providing services at home environment like recruiting of personal or a social assistant.", "...by providing social services in the home.", and "...developing of a network for suitable social services in a residential setting, to allow the elderly to stay in their home as long as they wish." Since remaining in a supported home environment was identified as an expectation but was illuminated as a solution, it likely and reasonably was also a barrier to the expectation. Another important barrier discovered through solution references was the Bulgarian social work structure itself. Danika, Kyrill, Alex, Boriana, and Jordan all expressed the need to get out of the office and give priority to fieldwork instead and reduce administrative burden to "focus on the specific needs of the people." Jordan and Alex added another dimension, "To ensure good communication between levels" and "Social workers should be given proper authority; their status changed, so that they could effectively work as a team." These statements suggested that barriers to effective social work are the roles and responsibilities (e.g., too much social work manpower dedicated to administrative work) and the interrelationships and interactions between levels of social work.

The analysis of “barriers” that inhibited successful aging produced findings aligned with systemic issues, both inside and outside the sphere of social work practice influence. A deeper understanding of barriers emerged from the study of references from the resolution section of the email interview protocol (see Appendix A). Destructing these suggested solutions identified structural barriers within the social work system present in all three levels. Because the participants provided solutions, it indicated that the structural barriers could be overcome. Therefore, the barriers that inhibited important successful aging factors, the availability, affordability, and accessibility to well-matched services, the need to age in a home environment, and the availability for social workers to be more directly involved with the elderly, were identified as candidates for a collaborative multilevel social work practice response as a means to restore successful aging.

Reflection Analysis

The second part of the participant member checking process was a separate email interview exchange of two open-ended questions that queried the participants’ reflections of the collective responses generated in the email interview exchanges, and an invitation to comment on the study itself (e.g., beneficial changes). Due to participant logistics, four out of the six provided a response, two of which answered that they agreed or had nothing to add, leaving two participants who provided reflective answers. For an unknown reason, the responses appeared in an area below both questions in an aggregate form of response to the two questions.

Since the collection of the descriptive text was only two paragraphs, the application of NVivo was not warranted. Coding memos produced from the reflection data were as follows: attitude, reform, faith, needs, resiliency, humanity, and successful. One participant's response captured most of these reflective themes:

“They (Bulgarian elderly) have a constant need for care and love in order to feel safe and not lose faith in themselves and God.”

After a careful review of the raw data as individual voices, another theme emerged that supported the most fundamental concept of the action research cycle, the presence of a change process. The following statements further validate action research, stakeholder change process, and the systems-oriented interventions of good social work.

Q: ... reflection?

A: ... first, we need to put some order in our souls, as the pure soul calls for a clear mind. In other words, we need to put order in our country, to create clear and precise rules...sure it would take time, as all this is related people's awareness and culture, their knowledge, attitude, mind, etc., but the sooner that comes to real, the better for all of us. Let's not forget that aging is ahead of us all.

A: ... the Republic must step in...this could be achieved through “big changes” in the social care system.

No participants disagreed, suggested changes, or introduced new concepts. After review and comparison of the coding memo themes against the codebook themes (see Appendix C) as indicated in Table 1, an 86% match emerged. It was also reasonable to conclude that the two participants were also in agreement with the collective responses.

Table 1

Reflection comparison

Reflection node	Problem	
	Node	Code
Attitude		Attitude
Faith		Faith
Humanity		
Needs	Needs	
Resiliency		Resiliency
Successful		Successful
System reform	System	

The final email interview exchange, a member checking mechanism, contained a summary of the findings to be verified by the participant through their email response. Since all responded “OK” or “verified,” no analysis was needed – the consensus was considered trustworthy.

Sentiment Analysis

The NVivo sentiment analytical tool measures the relative positive sentiment in each node and code using an algorithm. Although any form of written text has measurable sentiment, the characteristics of sentiment are only relative to that text itself (Kiritchenko, Zhu, & Mohammad, 2014), and therefore is difficult to incorporate as a useful finding for action research because it cannot indicate a change of sentiment. Therefore, to best use this tool to bolster validity, a measurement across and intervention type was required. In this study, the shift of critical thinking from problem definition to problem resolution as presented by the initial email interview exchange was enough to validate a change process occurred. Since the groupings of questions shared most of the variables (themes), the sentiment analysis became more important as a

validation tool to demonstrate the efficacy of action research methodology. All nodes and codes of the problem definition and problem resolution components that could be analyzed were first analyzed for sentiment type and level. Table 2 illustrates the nodes and codes that increased in positive sentiment. Note that a shift to less positive for a negative theme indicates more awareness of its negative characteristics, such as awareness. Sentiment identification is as follows: N = neutral, M = mixed, P = positive, and a double letter indicates an increase in the same sentiment type rather than a shift in sentiment type (e.g., PP = more positive).

Table 2

Sentiment analysis

Problem definition			Problem resolution		
Node	Code	Sentiment	Node	Code	Sentiment
Care		M	Care		P
Community		N	Community		PP
	Home environment	N		Home environment	PP
Services		N	Services		M
Situation		N	Situation		M
	Specific needs	N		Specific needs	PP
	Successful	P		Successful	PP
System		P	System		M
	Social policy	N		Social policy	M

Besides illustrating that a change of sentiment occurred, it was important to report that the changes in sentiment were in alignment with the previously analytical components, perceptions, expectations, and barriers: an increasingly negative sentiment

towards the themes and descriptors of “perception” validated that successful aging is not occurring in the rural Bulgarian elderly population; an increasingly positive sentiment towards the themes and descriptors of “expectations” validated that “expectations” to age successfully existed in the rural Bulgarian population; and since most of the node descriptors in the Codebook (Table 2) relevant to “barriers” were also aligned with the “perception” descriptors in a negative aspect, sentiment analysis relevant to “barriers” closely matched “perception”. This rationale indicated that many of the identified descriptors of unsuccessful aging were also considered to be barriers themselves. Further examination revealed these barriers to be systemically-based, barrier types that subjugate the elderly.

The findings in Table 2 also demonstrated that critical thinking occurred about how micro-, mezzo-, and macrolevels of social workers, intervening through their associated roles and responsibilities, understood the successful aging crisis. For example, a case manager likely did not consider social policy issues in their direct care role, but as indicated in Table 2, the shift from a neutral sentiment to a mixed sentiment indicated a shift to more negative sentiment occurred in the datasets, indicating a greater awareness level of the problem. The sentiment analysis findings indicative of the change process were an unexpected but welcomed addition to the overall findings that further validated action research methodology, the themes discovered through the email interview exchange, and the inherent nature of social work to understand and intervene within systems.

Summary

This summary of findings reflects the entire dataset analyses: (a) demographic (Figure 1-6), (b) problem (see Appendix C for codebook), (c) reflection (Table 1), and (d) sentiment (Table 2). The investigative nature of this action research study explored various characteristics and perspectives of the social worker participants to gain a better understanding of the successful aging crisis in Bulgaria. Several important outcomes from this research process accomplished this endeavor by providing collaborative responses to the research questions: “What are Bulgarian social workers’ perceptions and expectations related to successful aging for Bulgarian elders?” and “What are the barriers identified by Bulgarian social workers that inhibit successful aging for Bulgarian elders?”.

The demographic component in this study was designed to explore and understand the participants’ characteristics as a social worker interacting at some level with the rural Bulgarian elderly. Because sociohistorical events in Bulgaria severely impacted society, it was important to understand who shared those events. Equally important was the need to gain an understanding of how the social work system was structured, and how and at what level the social worker participants intervened with the rural Bulgarian elders. The examination of the social work practice structure also provided the information to generate a list of roles and responsibilities common to the NASW; a transcultural consideration that promoted better transferability of this project to a Western audience. Also, years of work experience, education level and degree, and

percentage of time spent working with the elderly further vetted the participants as knowledgeable, ethical, and experienced experts on the population and the problem.

Possibly the most significant outcome of this study relative to the composite research questions was the derivation of responses from a truly collective and egalitarian voice that reflected through perspective, the characteristics of the social worker participants. The themes, descriptors, and associated references (see Appendix C for codebook) demonstrated the broad spectrum of responses that reflected elements of the participant's various roles and responsibilities within their micro-, mezzo-, and macrolevels of practice. Additionally, the relationship of the themes to the problem demonstrated the systemic nature of the aging crisis, and the need for a systemic response (action) to effectively and sustainably restore the opportunity for successful aging to occur.

The findings of this exploratory study operationalized the research question components in the following ways: (a) Bulgarian social workers' perceptions related to successful aging for Bulgarian elders is that because expectations are not being met, successful aging is nonexistent; (b) Bulgarian social workers' expectations related to successful aging for Bulgarian elders is that expectations are not attainable due to systemic barriers; and (c) a collaborative multilevel response of Bulgarian social workers can overcome barriers that inhibit successful aging identified by Bulgarian social workers who interact with the rural Bulgarian elderly. Using the codebook (see Appendix C) to describe the three summarized question components produced an accurate and trustworthy platform to launch further research and action initiatives.

Moreover, the findings from this transcultural action research project were useful and meaningful to the beneficiary stakeholders (rural Bulgarian elderly), stakeholders (Bulgarian social workers), me (social work scholar practitioner) social work profession, literature, action research methodology, social work practice, transcultural ethics, and to the development of well-matched actions to create positive social change. The selected dual theoretical systems overlay, exploratory framework, and action research methodology coupled with the special overarching requirements of a transcultural study created a purposeful project that was well-aligned and applicable to good social work practice. With the confidence that these findings were an accurate, trustworthy, and a true representation of the problem and the stakeholders obtained in an NASW ethically compliant manner, I am ready to make recommended actions for positive social change concerning the aging crisis in Bulgaria.

Section 4: Application to Professional Practice and Implications for Social Change

The inspiration for this transcultural action research project originated from personal experience with a rural Bulgarian elder while I, accompanied by an English speaking real estate agent, was searching for properties in the rural Gabrovo region of central Bulgaria. After the initial encounter with the elderly woman, I internally analyzed the situation through my Western-aligned social work lens; a paradigm constructed by my past social work practice exclusive to the United States. Guided from a rationale built from this foundation, I concluded that the elderly woman might need to use some services to address her poverty and health-related problems, a typical case management intervention for assistance. During the drive to the next property, I learned through our discussion that there were no services at her village, limited transportation availability, and no family caretakers - a common situation for the rural Bulgarian elderly who often are compelled to sell their house in exchange for goods and services essential to survival. The justification of my motivation to intervene occurred after viewing several more properties, and repeatedly witnessing the same plight of the elderly. Because I knew virtually nothing about the population and the encompassing systems they interacted with, a deep and contextualized understanding was necessary to inform any recommended actions. Considering the objectives of this purpose, an action research study conducted in a social work practice setting was the best-matched research methodology to investigate the problem and population and to inform recommended actions that would produce a measurable outcome in an ethically and culturally responsive contextual framework. Furthermore, the nature of this transcultural research

project allowed me to function as a researcher, a participant, and a partner in the local social work practice setting, the opportunity to explore and learn about the perceptions and expectations of successful aging, the barriers encountered that hinder successful aging opportunity, and the overall system and social work structure that intervenes with the rural Bulgarian population.

The methodological processes and data generated from this project coalesced to produce findings that were key to the formulation of accurate responses to the research questions: “What are Bulgarian social workers’ perceptions and expectations related to successful aging for Bulgarian elders?” and “What are the barriers identified by Bulgarian social workers that inhibit successful aging for Bulgarian elders?”. Parallel with current literature, successful aging perceptions and expectations are definitionally relative across societies or other diversifying characteristics. Therefore, the need to operationalize these terms in the perspective of Bulgarian society was necessary to understand the intensity and components of the crisis. This study did find a consensus that systemic barriers, mostly attributable to the ramifications of major sociohistorical events, blunted and even inhibited the opportunity for elders to realize their successful aging expectations. Furthermore, the intensity and breadth of the systemic barriers were demonstratively too great to overcome through the elders’ resiliency and adaptation ability, which has led to a failure to thrive in old age. Because this project explored the problem within a systems framework theoretically aligned with social work practice, intervention characteristics could be specifically matched to the available resources and

components of Bulgarian social work practice to produce the most effective response to the crisis based on a positive social change initiative.

Western literature and available but extremely limited local Bulgarian information with regards to successful aging in Bulgaria were used in this study to demonstrate what was known and to illuminate what was unknown. Referred to as a literature gap, I formulated the question contents of the email interview exchange protocol to query the unknown information and to effectually bridge the gap by the discovery of purposeful data and by the dissemination of findings. Like the goal of this project to reach participant consensus about successful aging in Bulgaria, the findings of this project will further extend the global knowledge of successful aging through its representation of a minor population, and effectively be a building stone that may lead to the definitional consensus of successful aging; a precursor to new successful aging theory.

Transcultural action research projects such as this are themselves intervention tools within social work practice - they must have a purpose that achieves its goal through positive social change (Huang, 2010; NASW, 2017). Anything less would not uphold the values and associated ethics of the social work profession and do a disservice, perhaps harm, to the stakeholder groups. The following sections will present how this project integrated professional values and ethics, framed by the NASW, into the processes used to study the social work practice problem and introduce what findings-supported interventions for multileveled clinical social work practitioners are recommended to mitigate the crisis through positive social change best.

Application for Professional Ethics in Social Work Practice

Although all values and ethical principles contained within the *Code of Ethics* by NASW (2017) and redundant in the charter of the IFSW are equally important components that guide and shape any types of professional social work interventions, some become first of equals due to diverse problems and populations of everyday practice. Unique social work practice situations, such as those with a transcultural aspect, command additional preparation and diligence from the intervening social work practitioner to ensure the values and associated ethical principles are upheld (see Irvine et al., 2007). For this transcultural action research study, the core social work values of service and social justice were distinguished paramount to achieve and maintain for the following reasons. First, service, a primary ethical social work principle to help those in need and address social problems (NASW, 2017), was highlighted because of the successful aging crisis; a direct reflection of a bona fide social problem of systemic nature. Second, social justice, building a case for positive social change to restore equilibrium for those oppressed by injustices (NASW, 2017), was important because the systemic problem impacting Bulgarian elders emerged from ongoing repercussions of inequality and injustices stemming from shared sociohistorical events; thus, creating and exacerbating vulnerabilities within the elderly population that inhibit successful aging opportunity.

It should be clear that people in old age are not considered vulnerable, and if endowed with the components necessary to meet successful aging expectations, they will age successfully without negative attention (Laceulle, 2017). If, however, their

expectations are not supported, and they lack the resiliency to overcome the barriers through adaptive strategies, a vulnerability that becomes a general failure to thrive emerges (Hajek & König, 2016; Kruse & Schmitt, 2012). Sometimes an individual case, as I assumed during my first encounter with an elderly Bulgarian, may exist as an isolated event, but when an entire stratified population segment becomes and suffers from avoidable vulnerabilities, a systemic problem is a likely culprit. Translating these thoughts into a clinical social work practice setting, the *Code of Ethics* by NASW (2017) is a necessary guide to direct the proper conduct of practice. Often, intervention strategies that aim to restore equilibrium to systemically oppressed populations require interventions on both sides of the balance; a distinguishing hallmark of the social work profession (NASW, 2017). Also, good social work reflective of the established ethical codes must view the client in their environment and apply well-matched theoretical frameworks and associated interventions in a manner that respects and maintains the dignity, worth, self determination, and diversities of the client. These benchmarks alone require a high competency level to achieve, and even more so when a transcultural component overlays social work practice.

Beneficence for the client is not the only reason to conduct action research. Ensuring that the design and performance manner of research is useful for the broader society is an ethical standard contained within the *Code of Ethics* by NASW (2017) to promote positive global change through local interactions. As indicated in the literature review about the benefits of transcultural research to bridge global literature, very little non Western literature exists about successful aging or intergenerational caregiving.

Therefore, clinical social work practice with the elderly from minority populations, whether through evaluation or research, should inform the broader sphere. For example, this research, although it is about Bulgarian society, may provide useful information for other post-Communist societies in Europe or other societies that are experiencing an aging crisis phenomenon associated with intergenerational caregiving loss.

The primary findings from this study indicated that (a) Bulgarian elders were not aging successfully because systemic barriers have disrupted their ability and opportunity to live life in old age as they expected; and (b) a collaborative multilevel social work practice response was needed to overcome systemic barriers. Because the premise of professional social work is the holistic perspective of the client (Ashcroft, Van Katwyk, & Hogarth, 2017), a systems framework guides the conduct of ethical social work, regardless of intervention type or level. Through the research processes and findings from this study, I discovered that social workers from multiple levels were intervening with the elderly, but not in a manner of strategy or unified actions. Further findings indicated the social system structure itself was a barrier that prevented the collaboration necessary to respond as a multileveled collective effectively. Participation in this action research study provided a pathway to overcome this barrier, provided a platform for information exchange and learning, and demonstrated a new perspective of what a collaborative social work practice system was, and what it could achieve – a higher level of professional ethics.

Without the extra diligence required to meet high ethical standards for the transcultural nature of this study, the richness of the data may not have illuminated the

vitality of ethical social work practice. Elements of transcultural practice should be present in every interaction because social work practitioners can never understand the client fully. To be ethically responsive, social workers must learn about the client and adjust practice interventions accordingly, not standardize the client to a particular practice setting, culture, or biases reflective of the practitioner (see NASW, 2017; Shelden, 2015). Through the processes and findings of my research, I achieved an accurate and trustworthy consensus of problem definition and resolution. Built upon these solid findings, the recommendations for action steps in Bulgarian clinical social work practice to achieve a successful outcome will mitigate the aging crisis in Bulgaria and restore successful aging opportunity.

Recommendations for Social Work Practice

The process of reaching consensus towards findings was evident in the data stream. A group of highly educated and experienced professionals whom all work at some intervention level with the same population was brought together to discuss a systemic problem. The email information exchange was a safe and very productive method of learning about each other, the social work system, aging crisis, past events, elders, and possible solutions.

Due to the success of the platform, a more permanent and regular venue inclusive of all micro-, mezzo-, and macrolevels of social work to host the action research cycle is recommended to be created. Many outcomes could happen at first. With the focus on the elderly, micro- and macrolevel social workers could inform each other about services and funding, respectively, to increase output and outcome – a type of formative evaluation.

Small changes like the above would work to unify the responsive actions of the social work practice as a system and prepare it for bigger objectives that extend beyond its current sphere of influence. A second, but a related recommendation for social work practice is to prepare a professionally written, concise, and accurate report on the elder crisis, the unmet needs, and request for Republic or EU assistance. As mentioned above, before this is attempted, the social work practice system must be functioning as a collective. First, a full scale needs mapping service, available services, and resources inventory, case examples, and supportive literature, such as comparison regions in the EU, would need to be collected and presented through the proper policy making channels. Each level of the social work spectrum would provide their professional input, and using the framework of action research, levels of funding, policy change, or other proposed actions would be ratified for presentation.

As a social work practitioner who intends to stay in the rural Gabrovo region, the findings of this study further inform and support my ambitions as an advocate for the elderly. My intention is to develop a formal community care collective, similar to the informal village model presented by Stone (2013), which capitalizes the skills and the expertise of the elderly residents to build a sustainable, successful aging environment and community. A closer representation to this vision was the historical Good Samaritan model present in the mid-20th century America - a rural community residence of 8 to 10-elders who lived and worked together on a farm as a community collective (McClure, 1968). The restoration of community, compensation for intergenerational caregiving loss, abolishment of loneliness and isolation, preservation of a home type environment,

and the creation of purpose through activity were principles of the model that restored continuum of life and met the elders' adapted level of expectations to age successfully. Parallel to the Good Samaritan model, the themes and descriptors from the qualitative findings of this research are an essential shaping component for a project such as the one imagined: (a) the need to restore and maintain a functional rural community; (b) the need to remain in a home type environment; and (c) the need to allow the autonomy to feel purposeful. This strategy ensures that conformability exists on the side of intervention not on the client, as many institutions impose. Since the locations of most elderly are in or around depopulated villages, existing properties to create such a project are plentiful and inexpensive. The property would be familiar to the village residents, and improvements to it would be obvious and a talking point. Since the Bulgarian elderly are quite self sufficient and industrious, the property would need ample garden and outdoor workspace. To best fit the locale of the village, I suggest that a community meeting is held to introduce the project and solicit feedback. The meeting would also serve as a validation method to compare successful aging perspectives between the social workers and the elderly. As contributors to the intervention, the elderly would feel purpose through their investment into the project, and likely be even more motivated to ensure its success.

Furthermore, the collective idea of sharing resources, knowledge, and skills is aligned with their sociohistorical roots of socialism, which was an aspect projected in the expectations analysis and will help to disrupt boredom due to loneliness. The residents would have the autonomy to shape their community to fit their needs and abilities best.

Lastly, the more centralized location of the elders would likely increase efficiency in communication, transportation to needed services, and in home care, increasing the output potential through the conservation of limited resources.

The findings from this study demonstrated that successful aging occurs when a level of expectations is met or adapted to through resiliency. When resiliency cannot overcome barriers to these expectations, a failure to thrive occurs (see Hajek & König, 2016; Kruse & Schmitt, 2012). Although this study does not claim to define successful aging outside of the study context, it does bring context, process, theory application, and literature to outside clinical social work practice settings. For instance, the relationship of intergenerational caregiving loss to successful aging is an important lineage supported by CT in aging when contextualized by an overarching systems framework. For example, the findings indicated that because of the need for intergenerational transfer and other types of purpose common to intergenerational dwelling, the replacement of intergenerational caregiving did not fully fulfill the successful aging expectation because it did not match the needs of the continuum. Other populations may value other aspects, such as physical care, as the most important part of the continuum.

Furthermore, the findings discovered that the loss of intergenerational caregivers impacted the elderly directly and indirectly through loss of support types and loss of community and necessary services – an association that validated European literature about other former socialist countries. Therefore, the decision makers of other countries, especially former socialist, who are demographically aware of population losses, particularly in rural areas, may be more proactive to stem the loss or prepare support for

the remaining elderly. Clinical practitioners who work with the elderly and read this study may be more informed about how the elder is interacting with society rather than placing focus only on the acute concern. Also, younger social workers who have no recollection about Communist ideology and the associated implications after the regime collapse may better understand the reasoning of post-Communist elders' successful aging expectations.

In a broader sense, the findings from this study may be useful to better understand the mechanisms and influences of successful aging across different populations. For example, one society may weigh the level of physical (health) dimension heavily when considering successful aging, whereas another may place more emphasis on generativity, (i.e., maintaining a productive purpose). Social work practice in some instances can become too narrow due to the restrictions of policy, funding, or regulation, which can ultimately create a disservice to the client because of misaligned intervention. This transcultural research demonstrated that only proper research, (i.e., research guided by aligned (in this case) dual theoretical frameworks and foundational social work values that shaped the methodological approach and processes to be responsively adaptive to the context of the problem and population) produced the foundation for effective and ethical action. Additionally, the findings from this study demonstrated how the innovativeness inherent to social work, regardless of level or role, can be harnessed through action research to produce unique solutions that match systemically complex problems.

As with any good research, limitations are a natural consideration to be discussed. I am confident this research is an accurate and trustworthy representation of the studied

population, but outside of that, even within Bulgaria, full generalizability cannot be assumed due to a plethora of factors unique to the problem, population, and society. For example, the chain of isolation to loneliness to boredom is closely associated with depopulated villages and is a primary problem component in the Gabrovo region, whereas the problem in another region within Bulgaria may be challenged with food poverty because their environment does not support subsistence agriculture. Likewise, in the example, a population of Roma may not have intergenerational caregiver loss but is subjected to unequal treatment and receiving less or poorer services. The next generation of upcoming elders who did not share the sociohistorical events as an adult may have completely different expectations than their parents. These examples validate the purpose of the action research cycle as a continuous change process based on reflection that is the accurate voice of those who participate. Moreover, this research should be used as a template for study; making changes where necessary to accommodate the specific characteristics unique to the population or problem.

In anticipation of the recommended action steps for social work practice, further research with the same email interview exchange group could explore what the study findings indicated as a systemic problem in the utilization of necessary services. I discovered the mismatch between the essential services and the needs of the elderly. For example, the medical services available to the elderly did not match their needs or was inadequate, and transportation to the location of the needed services was not available where the need was located, which translated to direct service delivery, program management, and administration/policy levels of Bulgarian social work that were not

responding collectively, thus presenting a systemic barrier. These findings also reflected the structural characteristics of Bulgarian social work; a poor or nonexistent communication between the levels of social work that was the mechanism of the barrier. The further proposed information exchanges between the micro-, mezzo-, and macrolevels of social workers who administer, manage, and fund/direct the essential services specific to the rural Bulgarian elderly would likely prompt the development of strategies to increase the level and quality of services for those in need through a unified approach to administer, manage, and use services more effectively.

An executive summary of the project will be made available to the multilevel social worker participants (primary stakeholders) whose practice scope includes the elderly Bulgarian population located within the rural Gabrovo region. The executive summary may provide the momentum needed for effective action research through feedback suggesting further research or actions, such as the examples mentioned above. Each of the participant stakeholders will see elements of their input, which may generate feelings of ownership, professionalism, and unity as a social work practice structure that is working for a collective goal to end the aging crisis. Equally important is maintaining the unique aspects/responsibilities of a transcultural study. Because the study is written in the English language and will reside in Western literature, the manuscript is recommended to be professionally translated into the Bulgarian language and reside in a Bulgarian journal for social science. This action would introduce the Bulgarian academic world to the consideration of new perspectives and inspire the enlistment of others to address the aging crisis known to them.

Implications for Social Change

Since the overarching theoretical framework was a systems-based/learning type, the demarcation of the relatively unknown Bulgarian social work structure and its associated intervention properties defined primary micro-, mezzo-, and macrolevels of social work, which were translated into social work roles and responsibilities common to NASW: (a) micro = case management role, care coordination, advocacy, assessment, care planning, crisis intervention, prevention, direct care interventions, and mediation responsibilities, (b) mezzo = manager role, project management, and organizational management responsibilities, and (c) macro = community change agent role, organizational leadership, fiduciary, and policy administration roles. Because the systemic problem identified was matched with a systemic response from each level as a measurable positive social change, the need to discuss this potential positive change at each level is warranted and ethically responsive to establish evaluative systems that report output and outcome of the actions. Implementation of my recommended actions would positively impact all three levels of Bulgarian social work practice; a benefit when the direct care providers, program managers, and administrators who serve the elderly population in the rural Gabrovo region are equal investigative and decision making social work partners.

Because the recommended changes are systemically derived and systemically delivered, it is prudent to discuss the implications per recommendation rather than a certain system level analysis. The first recommendation, to bring perpetuance to the action research cycle through the continued information exchange and partnerships

between social work practice levels through regular multilevel collaboration would improve efficiency in service delivery, and work to better match the specific needs of the elderly (micro), such as the need for specialists in geriatric medicine instead of general practitioners, or the fitting and repair of mobility assistance devices. Possibly, funds could be reallocated (macro) from poorly attended services in larger villages, such as a traveling dentist, due to the lack of inter village transportation, to provide transportation to a more central location such as Dryanovo or Gabrovo for services that have multiple service providers and a more modern infrastructure that is better equipped to match the individual needs of the elderly (mezzo). The development of other efficient strategies to maximize the available resources would evolve through discussion. Most importantly, all these actions would benefit the Bulgarian elderly through positive social change within each level of Bulgarian social work practice. Second, the recommendation to compile a detailed report of the aging crisis for policy/funding change would incorporate the involvement of all three levels of Bulgarian social work practice. One example of an action would be a needs assessment of the Bulgarian elders (micro) and what needs are currently served (mezzo). The process of needs mapping would directly bring each elder into the process, which would give them a voice and ownership, and the chance to be a collaborative stakeholder with policy makers (macro) in the process. Because the elderly segment of the population commands weighty political power through representation, their unified advocacy behind subsequent policy initiatives would be important for success. In each of these recommended actions, the key point remains the same – social work practice cannot be effective at one level of intervention when the problem

encompasses all levels. A systemically matched response is the only response that upholds the unique spirit of social work, collaboration, and unity.

Summary

After critically thinking, analyzing, and reflecting on the performance of this project as a tool to study a real crisis, I have come to several important conclusions. First, the production of rich data from action research is dependent on the proper and ethical conduction of its very special methodology. Moreover, it can produce a perpetual cycle of change that constantly evaluates, responds, and reevaluates the outcome, ensuring that a dynamic problem has a dynamic response, or a systemic problem maintains a systemic-based intervention. Action research is only good as the participants. Therefore, if the participants are social work practitioners, their allegiance to the *Code of Ethics* (NASW, 2017) and associated ethical standards, will ensure that action research methodology retains its ability to be a good research and solutions tool. Second, the impact of the transcultural component of this research study was overwhelming at times, but through the course of data collection and analyses, I understood that transcultural research conducted properly can add much rigor to the study, and equally important trustworthiness for the stakeholder populations. Because of the scarcity of transcultural research in social sciences, the most difficult part was to know when I had prepared enough to ensure the design components and processes were culturally responsive and ethically reflected all social work values.

This project began as a happenstance encounter with a Bulgarian elder who was in peril, and soon the discovery of many just like her. This appalling situation challenged

my preexistent social work lens to make sense of it, but I could not achieve it alone. Therefore, I chose to conduct an action research study to investigate the problem and population through a perspective I shared, social work practice. Six highly educated and experienced multileveled social workers from the rural Gabrovo region in Bulgaria participated in a technology-enhanced form of a focus group, email interview exchange, to explore the perceptions and expectations of successful aging and its barriers for rural Bulgarian elders. An overarching systems/learning theory contextualized continuity theory for aging as a framework to organize and classify the components of the study, collect suitable literature, inform a discussion agenda (email interview protocol), analyze the data, and synthesize the findings.

The findings were important in several ways and had multiple aspects of beneficence. First, the findings resoundingly demonstrated that successful aging is not occurring in Bulgaria and is a systemically-rooted failure to thrive crisis. Second, direct barriers to successful aging are highly associated with the loss of intergenerational caregivers, directly and indirectly. Doubly impacted by the loss of support and caregiving, the population loss of working age Bulgarians has devastated the rural villages and further isolated them from essential services and social interaction. Third, the Bulgarian social work system does intervene with the elderly but does not act as a unified body in intervention type or level. Fourth, the change process inherent to action research was identifiable in the rich data and the increase in sentiment. High participation retention rates during the study indicated that Bulgarian social workers do care and want to do more for their people. One social work research participant said it best, “We need

to keep our humanity and try to help older people live longer and happier lives. Let's be better people!!!” Thus, action research was validated as a well-matched methodology to investigate the situation, provide a collective voice, and to become a platform for future remedial actions of positive social change. Fifth, the findings including the whole action research process, have prepared me to understand a population that I plan to focus my clinical social work practice upon here in Bulgaria. Although the project was an academic capstone requirement, it was a real project that will certainly continue to exist.

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Appendix A: Email Interview Exchange Protocol

(English Version)

Demographics:

1. How many years have you been a social worker?
2. What is your job title?
3. What educational degree and level do you hold?
4. What are your social work roles and responsibilities?
5. What percent of your time is spent working directly or indirectly with the elderly?

Problem Definition:

1. For the rural elderly you work with, how would you describe life in old age?
2. How life in old age should be?
3. What happened that changed life in old age?
4. What things are keeping life in old age from what they should be?
5. How do you define successful aging?
6. How does someone in old age determine if they are aging successfully?
7. How would you describe the current state of successful aging in Bulgaria?
8. How does intergenerational caregiving contribute towards successful aging?
9. What is the social system currently doing to support successful aging?

Problem Resolution:

1. How do you think Bulgarian social workers as a whole, (i.e., multileveled social workers who directly or indirectly interact with the elderly) could work better

together in addressing the problems that inhibit successful aging for rural Bulgarian elders?

2. What could be done to effectively replace intergenerational caregiver loss?
3. How could defining “successful aging” help Bulgarian elders to age successfully?
4. What changes in the social system do you envisage as the most effective in supporting Bulgarian elders’ expectations of successful aging?
5. What other ideas do you have that may help remove barriers so Bulgarian elders can age successfully?

Reflection:

1. After reviewing the collective responses from the other participant social workers, please reflect by writing your thoughts (e.g., agreement, disagreement, additional information needed, changes needed, additional discussion needed, and any other concepts).
2. In addition to the questions posed by this study in an effort to explore the problem and develop solutions to the successful aging crisis faced by Bulgarian elders, please comment on any changes that you feel may be beneficial to this study.

(Bulgarian Version)

Демографски данни:

1. От колко години работите като социален работник?
2. Какво е наименованието на вашата професия?
3. Какви образование и степен притежавате?
4. Какви роли и отговорности има вашата социална работа?
5. Какъв процент от времето ви е ангажирано с пряка или непряка работа с възрастни хора?

Дефиниране на проблема:

1. Как бихте описали живота в старческа възраст за възрастните хора от селата, с които работите?
2. Какъв трябва да бъде животът в старческа възраст?
3. Какво е това, което променя живота в старческа възраст?
4. Какво ограничава живота в старческа възраст да бъде такъв, какъвто трябва?
5. Как определяте достойното остаряване?
6. Как възрастният човек определя, че остарява достойно?
7. Как бихте описали сегашното състояние на достойното остаряване в България?
8. Как обгрижването между поколенията допринася за достойното остаряване?
9. Какво прави социалната система за кризата на стареенето в момента?

Решение на Проблема:

1. Как мислите че могат българските социални работници като цяло, т.е. социални работници на много нива, които пряко или непряко общуват с възрастните, да работят по-добре заедно за разрешаване на проблемите, които пречат на достойното остаряване на възрастните хора от селата в България?
2. Какво може да се направи за ефективната замяна на починал близък обгрижващ?
3. Как би могло да помогне на българските възрастни хора да остаряват достойно определянето на термина „достойно остаряване“ ?
4. Какви промени в социалната система считате че биха били най-ефективни за подпомагане очакванията на българските възрастни хора за достойно остаряване?
5. Какви други идеи имате, които биха помогнали за премахване на бариерите пред достойното остаряване на българските възрастни хора?

Забележка:

1. След като се запознаете с общите отговори на другите участващи социални работници, моля отразете писмено вашето мнение, например съгласие, несъгласие, необходимост от допълнителна информация, необходими промени, необходимост от допълнителна дискусия и всички други концепции.

В допълнение към въпросите посочени в това проучване в опит да се проучи проблема и да се разработят решения за кризата на достойното остаряване, с която

българските възрастни хора се сблъскват, моля коментирайте всякакви промени, които смятате, че биха били полезни за това проучване.

Appendix B: NVivo Automatic Coding Analysis

Nodes	References	Codes	References
Aging	3	people age	1
		aging crisis	1
		useless age	1
Care	12	adequate care	1
		community care	1
		foster care	1
		easy access	2
		improving care	1
		institutional care	1
		possible care	1
		proper care	1
		residential care	1
		social care system	1
		social services	1
home care system	1		
Community	5	community care	1
		community life	1
		community services	1
		community type	
		activities	1
		old age community	1
Elders	8	Bulgarian elders	3
		elderly people	5
Home	3	appropriate nursery	
		homes	1
		home environment	2
Life	15	community life	4
		everyday life	3
		keeping life	1
		successful life	7
Low pensions	5	low pensions	5
Needs	3	medication needs	1
		specific needs	2

Pensions	8	decreasing pensions	1
		low pensions	4
		national retirement pension system	3
People	4	disabled people	1
		elderly people	1
		people age	2
Services	15	adequate services	3
		protection services	1
		community services	1
		homecare services	1
		mapping services	1
		providing services	1
		quality service	1
		service staff	1
		service under ledger organization	1
		service user records	1
		social service area	1
		social service claimants	1
		vendor services	1
Situation	12	isolation	8
		loneliness	4
Small, depopulating villages	4		
System	5	pension	5

Appendix C: Codebook

Node	References	Code	References
Care	14	Community	1
		Easy access	2
		Home environment	2
		Improving	1
		Inadequate	1
		Institutional	2
		Needs matched	3
		Quality	2
Community	12	Care	1
		Population loss	4
		Life	1
		Poverty	5
		Services	1
Elderly People	10	Attitude	3
		Autonomy	1
		Community	2
		Disabled	1
		Home environment	3
Institution	3	Easy access	1
		Home environment	1
		Quality	1
Life	22	Attitude	3
		Changed	5
		Cheerful	2
		Community	2
		Everyday	1
		Faith	2
		Home environment	2
		Peaceful	1
		Successful	4
		Needs	5
Needs matched	2		
Specific	2		
Services	15	Attitude	1

		Autonomy	1
		Community	1
		Easy access	2
		Home environment	2
		Improving	2
		Inadequate	1
		Needs matched	3
		Quality	2
Situation	34	Attitude	3
		Changed life	3
		Community	1
		Desperation	4
		Disabled	2
		Faith	2
		Home environment	2
		Isolation	6
		Loneliness	7
		Poverty	3
		Resiliency	1
System	28	Attitude	4
		Funding	5
		Home environment	1
		Pension	5
		Services	4
		Social policy	6
		Structure	3
