Modalities and Costs of Familiar and Social Support to Chronically Ill Patients: A Pilot Investigation in the Udine Health District

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Abstract

The main objective of this study was to quantify the characteristics of social networks in a sample of elderly ill patients. These patients who had chronic illness were receiving home based care, in an Italian district during 2001. Both patients and caregivers were interviewed. The analysis of the caregivers' questionnaire was conducted to avoid missing answers when gathered from the patients. This method also enabled a better understanding of the impact of social support on chronic illness pathologies. Further more, it allowed the investigation of the patients' network, the caregivers' point of view, the costs, the quality of care and the assessment of socio-demographical data of both. Results highlighted the particular situation of patients, characterized by high dependence from other persons especially

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for every day activities. Most of the caregivers were family members for the number of persons involved and for the time spent for the care. The network support maintenance and mobilization costs evaluation was faced suggesting three different strategies, according to three different ways of time-opportunity calculation, of the informal caregivers.

1 Introduction

The growing emphasis in the Western world on transferring at least part of the inhospital care of some patients to primary, community based care, is targeted to specific goals: (i) to increase the efficiency of care leaving the patients as close as possible to their home, (ii) to increase the independence of the patients, and their quality of life, and (iii) to contain the overall costs of care, particularly for long term chronic illnesses. The main reasons for this fast growing interest in replacing hospital care with home care are: (i) the growth in the number of elderly and chronically ill people, (ii) the lack of availability and accessibility of acute and sub-acute inpatient service, (iii) the technological innovation, (iv) the patients' choice, as they often prefer to stay in their home environment, thus improving quite substantially their standards of living (Bentur, 2001). In this respect, it is possible to divide the patients who receive medical home care in two categories: (i) chronically ill patients who often are at high risk of hospitalization with relative long durations, and (ii) patients who, owing to an acute event, need shortterm, intensive medical treatments but they don't need long-term nursing and maintenance care. In general, medical home care is an alternative to long-term care for elderly and chronically ill patients, who require living along with the limitations imposed by their clinical conditions. The most prevalent illnesses of these patients are usually congestive hearth failure, chronic pulmonary disease and the final stages of a terminal illness (Bentur, 2001). The impact of such diseases and treatments should be measured not only in terms of survival (quantity of life) but also in terms of well being (O'Boyle, 1992), in particular for chronic illnesses with poor prognosis. In 1996 the World Health Organization Quality of Life Group defined the Quality of Life as "an individual's perception of their position in life in the context of culture and values system in which they live and in relation to their goals, expectations, standards and concerns. It is a broad ranging concept affected in complex way by the person physical health, psychological state, level of independence, social relationship and their relationship to salient features of the environment" (World Health Organization Quality of Life Group, 1996). Certainly, a home assistance for such patients has the potential to improve their Quality of Life as chronic ill subjects, because it can increase their independence and their possibility of getting more social support. Eventually, the social support influences also health outcomes and reduces mortality, as it is known that stressful social relationship increases health problems (Kaplan and Toshima, 1990).

The term "social support" refers to different aspects of social relationships and may be defined in terms of quantity of social relationships (integration versus isolation), in terms of structure of a person's social relationships (in this case the expression "social network" is often used) or as qualitative content of relationships, meaning the degree to which the social relationships provide emotional concerns, understanding, caring, instrumental and practical aid (House and Khan, 1985). Moreover, social support has to be split in two different parts: actual support and perceived support. In most of the studies perceived support is the most powerful predictor of health (Turner, 1983). Lately many researches have been conducted in order to understand the impact of social support on different chronic illnesses (Newsom *et al.*, 2005, Simoni *et al.*, 2006). These researches have led to a general acceptance that social support has a beneficial effect on daily life and it helps people to remain healthy.

In this study, particular attention has been given to heart disease, cancer and dementia, which represent a major part of the burden of chronic diseases (Joyce *et al.* 2005). Currently, psychosocial factors and social relationships are known to play a crucial role as predictors of mortality in congestive heart failure patients (Murbreg and Bru, 2001); whereas a lack of social support and social isolation are associated with increased risk of mortality (Case *et al.*, 1992). As regards patients affected by dementia, there is a little evidence of the effect of social support on the occurrence of dementia (Henderson *et al.*, 1996); the results of a study on different degrees of social connections showed that being single and living alone are strong determinants of dementia, almost doubling the disease risk (Frantiglioni *et al.*, 2000). The social support for cancer patients is important for psychological adjustment and survival (Carlsson and Hamrin, 1994); other studies underline the differences between patients who receive treatment away from or at home (Payne *et al.*, 2001).

Home based care assistance can decrease the readmission rate and its associated costs. It improves the overall quality of life of chronically ill patients and their perception of independence. It is very difficult to compare the costs of medical home care with hospitalization costs. The reduction of the days of hospitalization, as a consequence of early discharges, can lead to medical home services with long duration, raising the total costs for the system (Vaux, 1988). Moreover, the National Health System saving could become an expense for patients and their families.

The goal of this study was to investigate the social and medical care support given to chronic patients in a northern Italian Health District, using the methodology of social network analysis. Finally, an attempt to provide preliminary estimates of the cost of an "at home" care was performed, with the aim of including both direct and indirect costs represented by the family activities in taking care of patients.

2 The health system in Udine

Social support was assessed in a sample of elderly patients (over 75 years old) with chronic illness (cancer, heart failure, dementia), who requested the National Health Service (NHS) for a "Home Based Care" during 2001, in the Udine Health District.

Udine Health District is an Italian health community district, situated in the North-East of Italy, in the Friuli Venezia Giulia Region. The Region counts 1.200.000 inhabitants and shows both agricultural and industrial economy and high social and economical levels.

In Italy home care services are provided by two different organizations:

- Home care health service provided by N.H.S. consists in nurse and/or rehabilitation therapist's home visits and interventions for people who need to be treated at home (medications, physiotherapy, monitoring chronic disease,...). These services are free;
- Home care social service provided by municipalities consists in caring for aged people (personal hygiene, house cleaning, meal preparation, telemedicine). These services have to be paid according to the patients' incomes. Home care social services may also be provided by several kinds of private agencies.

The district of Udine is the smallest administrative entity of the NHS (supporting from 60 to 150 thousand inhabitants) and it is the reference point for social services and primary cares. The local epidemiological situation is similar to the national one: chronic diseases are prevalent with a high pressure for hospitalization.

As the health and social services come from two different organizations, the district decided to constitute a single unit, integrating the overall activities: (i) the social and health request organization, (ii) the improvement of cooperation between hospital and district for the early discharges, (iii) the development and implementation of the services, (iv) the social and health workers' training, (v) the establishment of a home service network information point.

The final purposes of this kind of service were: (i) to avoid early hospitalization of aged people, (ii) to hold up loss of autonomy, (iii) to reduce hospitalization rates and promote early discharges, (iv) to facilitate the decision of aged people to stay at home.

During the first year activity 2433 people were cared by integrated home care service.

3 Study design and sample

The sample consisted of 50 patients affected by cancer, heart failure and dementia older than 75 receiving Home Based Care from the Health District of Udine during 2001. The sample was randomly selected from a list of consecutive patients in charge of the District having these characteristics. Presentation letters were sent to selected patients; then they were contacted by phone to fix two appointments: one for a face-to-face interview with them and the other for a face-to-face interview with one of their caregivers.

Since the objectives of this study were the identification of the patients' networks⁷ and the final costs for the families, the network was centered on the patient. Social networks of the patients were measured using structured interviews for both patients (when possible) and caregivers, using ad hoc questionnaires.

The caregivers' questionnaire was an extension of the patients' one, containing a number of additional questions about his/her activities. The answers of the caregivers were used both to clarify uncertain situations given by the patients' partial or doubtful answers and to complete missing answers. Caregivers were classified as "relative caregivers" if they were strict relatives of the patient, "extrarelative caregivers" if they were friends or neighbours, "volunteer caregivers" if they were people coming from no-profit organizations, "private" if they were people without specific education, being paid for giving assistance from the patient's family, "professional" if they were people with specific education paid from the family and finally "non-private" if they were people provided by the local Health System.

The patient's questionnaire included questions about: the social network, the quality of care, the costs supported for the care, and socio-demographical data. The caregiver's questionnaire consisted of different groups of questions about: the social network of the patient, the quality of care (in his/her opinion), the total costs for the care, the activities involved in caring the patient, and socio-demographical data.

One of the main objectives of the study was the evaluation of the total costs of the care, considering both the direct costs (including the price -if paid- to receive the home care services from the NHS and the compensation of other private caregivers), and the indirect costs (including the time-opportunity of volunteer caregivers spent to care for the patient).

Direct costs were calculated on the basis of the hours of the professional caregiver's work in assisting the patient, the salary and the price of the "NHS Home Care". The subjects were asked about the price of the home care service provided by the district (in case they had paid it) during the interview.

⁷ Patients' networks include professional and non professional assistance (volunteers or family) helping the patients in their daily activities.

Indirect costs, expressed in terms of the cost of the time-opportunity of the volunteer caregivers, were harder to evaluate. We proposed three strategies for the evaluation of the indirect costs, on the basis of the volunteer caregiver's profession and multiplying the time of care for: (*i*) the average regional salary of the profession in 2001 (case 1), (*ii*) the average salary of a professional caregiver (case 2), (*iii*) the mean net Italian income per capita in 2001 (case 3). As regards the other caregivers (15 persons), because of the heterogeneity of their professional lives (mostly retired or dedicated to home care), it wasn't possible to think of a given salary for their time, and thus we decided to assign: the average salary of the interviewed caregivers (case 1), the average salary of a professional caregiver (case 2), and the mean net Italian income per capita for 2001 (case 3).

For the statistical analysis we used the following measures: mean, median, absolute numbers, percentages, first and third quartile, confidence intervals. All analysis were done using SPSS ver 13.

3 Results

Most of the sample (50 pts) is living with another person (Table 1). The majority, 61%, is living with one or more relatives and the 19.5% with his/her partner.

Table 2 presents the patients' activities and their autonomy in managing them. A patient was classified as "independent" in an activity if she/he can manage at least 70% of his/her activities alone, with or without difficulty; she/he was classified as "less independent" if she/he can manage less then 70% of the activities with the help of someone else; she/he was classified as "totally dependent" if she/he is completely unable to manage it without the help of someone else. According to these criteria forty-nine patients (98%) resulted dependent in their home activities and 42 (84%) resulted dependent in their daily activities (Table 1).

Table 1: Characteristics of the patients. Percentages refer to the number of people matching the specific condition (rows) among those (N) for which the information is available. Health and social assistance are not mutually exclusive categories.

		Ν	N (%)
Independence	At least 70% of daily activities	50	8 (16%)
	At least 70% of home activities	50	1 (2%)
Living	Alone	46	2 (4.3%)
	With the partner	46	9 (19.5%)
	With one or more relatives	46	28 (61%)
	With a private assistant	46	6 (13%)
	With another patient	46	1 (2.2%)
Assistance	Health workers' assistance	45	43 (96%)
	Social workers' assistance	45	4 (8.9%)

		Independent	Less	Totally
Activities	Ν	patients	independent	dependent
			patients	patients
Home activities				
shopping	50		36 (72%)	14 (28%)
cleaning	50	4 (8%)	32 (64%)	14 (28%)
cooking	50	5 (10%)	31 (62%)	14 (28%)
washing laundry	50	3 (6%)	33 (66%)	14 (28%)
ironing	50	2 (4%)	34 (68%)	14 (28%)
gardening	50	4 (8%)	20 (40%)	26 (52%)
giving injections and bandaging	50	1 (2%)	43 (86%)	6 (12%)
housework	50	2 (4%)	35 (70%)	13 (26%)
Daily activities				
washing body and bathing	50	4 (8%)	46 (92%)	
washing hands and face	50	22 (44%)	28 (56%)	
putting on shoes and socks	50	11 (22%)	35 (70%)	4 (8%)
(un)buttoning and (un)doing zippers	50	14 (28%)	33 (66%)	3 (6%)
putting on clothes	50	14 (28%)	33 (66%)	3 (6%)
using the WC also going there	50	15 (30%)	26 (52%)	9 (18%)
rising from and going to bed	50	13 (26%)	33 (66%)	4 (8%)
feeding	50	27 (54%)	22 (44%)	1 (2%)
washing and combing hairs	50	3 (6%)	47 (94%)	
cut nails and toes	50	8 (16%)	42 (84%)	
going up and down stairs	50	9 (18%)	13 (26%)	28 (56%)
walking around the house	50	14 (28%)	15 (30%)	21 (42%)
walking outside the house	50	8 (16%)	14 (28%)	28 (56%)
taking medications	50	12 (24%)	38 (76%)	

Table 2: Usual activities and autonomy of the patients. Percentages refer to the number of people being in a condition of (i) independence, (ii) partial dependence and (iii) complete dependence for each given activity (row).

Table 3 shows who is helping these "less independent" patients in their home and daily activities. Relative caregivers are clearly playing the major role in assisting the patients in their life habits (walking, rising from bed, washing), but impressively, they also take care of more sophisticated activities, like injections, which usually require a level of training, in the same percentage as professional caregivers.

As for the utilization of the services of the "NHS Home Based Care" and the corresponding level of satisfaction, 91.5% of the sample was satisfied with the health workers' assistance (73.9% of these consider the health care received useful), whereas only 8.9% were satisfied with social workers' assistance. For the 76.5% of the patients the timing of the interventions are good for their needs, the 79.3% doesn't feel limited by the workers' presence and 58.6% said that the interventions were fast in case of urgent need.

The utilization of the structures during the last 6 months is particularly homogeneous for the different structures; on average, patients required one General Practitioner's visits, one Specialists' visit, one hospitalization and one corresponding ambulance call. The average number of medicines per day for patient is 4. The 27.7% of the patients called the social assistance in the 6 months of the study, mainly requesting for information, whereas the 11.1% contacted voluntary organizations for Tele-Emergency related services.

Table 3: Who is helping the less independent patients in their activities. Percentagesrefer to the number of caregivers, according to their classification as "relatives" or"professional", giving their assistance in each given activity (row).

	N of		
Activities	caregivers	Relative caregivers	Professional caregivers
Home activities			
	38	32 (84%)	6 (16%)
shopping	20	10 (620)	11 (070)
cleaning	30	19 (63%)	11 (37%)
cooking	30	22 (73%)	8 (27%)
washing laundry	33	23 (70%)	10 (30%)
ironing	31	23 (74%)	8 (26%)
gardening	18	17 (94%)	1 (6%)
giving injections and bandaging	38	21 (55%)	17 (45%)
housework	32	21 (66%)	11 (34%)
Daily activities			
washing body and bathing	53	39 (74%)	14 (26%)
washing hands and face	33	23 (70%)	10 (30%)
putting on shoes and socks	41	30 (73%)	11 (27%)
(un) buttoning and (un)doing zippers	40	28 (70%)	12 (30%)
putting on clothes	39	28 (72%)	11 (28%)
using the WC also going there	27	23 (85%)	4 (15%)
rising from and going to bed	39	30 (77%)	9 (23%)
feeding	20	14 (70%)	6 (30%)
washing and combing hairs	44	34 (77%)	10 (23%)
cut nails and toes	45	33 (73%)	12(27%)
going up and down stairs	12	11 (92%)	12(27,0)
walking around the house	11	11(92%)	1 (0,0)
walking outside the house	10	11(100%) 10(100%)	
taking mediaations	10	10(100%)	10(220%)
	40	30 (78%)	10 (22%)

Only the "less independent" patients were considered. "Other caregivers" (not private and not relative) not considered.

3.1 Caregivers

In correspondence with the 50 patients of the sample, 110 caregivers were interviewed (on average 2.2 caregivers for patient). The 110 caregivers included both professional and volunteer caregivers. Sixty-five caregivers (59%) were patients' relatives and 45 (41%) were not relatives: out of these 45, 30 (27%) were professional caregivers. The 45% of the total number of the caregivers lived with the patient.

Tables 4 and 5 present the total number of caregivers classified by relation (relatives/extra-relatives) and by residence (cohabiting/not cohabiting with the patient). The 12% of the caregivers were of the same generation of the patient

(partner, sister), whereas the 88% were from upper generation (sons, daughters, nephews). The caregivers were 79% female and this percentage increases up to 96% if we consider only the professional caregivers. Both among professional and volunteer caregivers there is a clear preponderance of female. Caregivers were on average 59 year old, the 64% with a lower education and they have assisted the patient since 8.6 years on average.

Caregivers, half of which are relatives, are thus providing a long-term assistance for such patients.

N=110	Partner	Son	Daughter	Sister	Daughter in law	Sister in law	Son in law	Grandchild
Cohabiting	10 (9%)	6 (5%)	13 (12%)	2 (2%)	6 (5%)	2 (2%)	1 (1%)	3 (3%)
Not	. ,	6	12	. ,	1	. ,	2	1
cohabiting		(5%)	(11%)		(1%)		(2%)	(1%)

Table 4: Number of relative caregivers.

	Private	Not private					
N=110	Physiotherapist	Home Care	Nurse	Extra- community	Private Care	Neighbour	Other
				Care			
Cohabiting				5	2		
				(4%)	(2%)		
Not	1	3	6	10	3	4	11
cohabiting	(1%)	(3%)	(5%)	(9%)	(3%)	(4%)	(10%)

 Table 5:
 Number of extra-relative caregivers.

3.2 Type and times of the developed activities

The time the caregivers devote to the care of the patient were calculated on the basis of the activities of Table 1. These activities were classified according to the importance given by the patient to his/her normal life. Particular attention was given to daily activities, such as body care and home activities, considered important for the living environment.

The average daily time of care requested by a patient consists of 6 hours and 10 minutes; the average daily time of care spent by each of the 110 caregivers to care for the patient is 2 hours and 48 minutes (Table 6 and 7). The average time of care a patient receives daily is 6 h and 10 min, divided into (on average) 4 h and 34 min in case of relative caregivers, in 1 h and 29 min in case of private caregivers and in 7 min in case of other caregivers (neighbours and friends). On average the time that each caregiver spend daily for helping the patient 2 h and 48

min: on average each relative spend 3 h and 31 min, each private caregiver spend 2 h and 29 min and each other type of caregiver spend 23 min.

				Relative	Private	Other	Total
-				caregivers	caregivers	caregivers	
Average	daily	time	for	4 h 34 m	1 h 29 m	7 m	6 h 10 m
patient				[3h 38m; 5h 32m]	[40m; 2h 19m]	[0 m; 29m]	[5h 5m;7h 16m]
(hours and	d minut	es)		C.I. 95%	C.I. 95%	C.I. 95%	C.I. 95%

Table 7: Average daily time of care for caregiver.

Table 6: Average daily time of care for patient.

				Relative	Private	Other	Weighed
				caregiver	caregiver	caregiver	average
Average	daily	time	for	3 h 31 m	2 h 29 m	23 m	2 h 48 m
caregiver				[2h 42m; 4h 21	[1h26m;3h	[0; 1h	[2h 4m; 3h 34m]
(hours and	minutes)		m]	32m]	1m]	C.I. 95%
				C.I. 95%	C.I. 95%	C.I. 95%	

3.3 Estimates of the direct and indirect cost of home care

The total cost per month was estimated on the basis of the price of the service (paid by the patient or by an assistant), the cost of other professional assistants and the cost of the time-opportunity of the volunteer assistants (Table 8). The average costs for the patient's family is thus estimated to range between 1500 and 2100 euro per month, according to the various definition for the time-opportunity adopted.

Table 8: Estimate of direct and indirect costs (direct public costs estimated on 28 patients: 939 €).

	Dool colory	Professional	Avorago italian
	Real salary	assistant salary	salarv
)	
Patients paying private care	291	291	291
Assistants paying private care	314	314	314
Cost of private assistants	334	334	334
Time-opportunity of volunteer assistants	<i>983</i>	1134	605
Total euros per patient per month	1922	2073	1544

It appears that the relatives represent the 74% (in terms of time) of the patient's care, the private caregivers represent the 24% and the other caregivers represent only the 2%.

If we take as a reference a 40-hours working time per week, assistance of patients represents half of the their relatives' working time.

4 Discussion

The data show how the informal care to patients represents the major part of the overall care, both for the number of people involved and for the time spent.

The information about the time spent for the care by the various categories of caregivers underline the great engagement of the members of the family, especially females, on the patient's care. The other caregivers help the patient daily for a very short time. This is in agreement with other researches (Roberto *et al.*, 2005), where the main importance of the family in the care of chronic illness is evident. It is to notice that the interviewed caregivers have assisted the patient on average since 8.6 years.

Several studies indicated that the experience of care giving is different for males and females: more often female patients receive assistance from both spousal and non spousal sources, but male patients tend to rely solely on their wives (Northouse *et al.*, 1999). Moreover in literature it appears that female caregivers report more stress and burden (Blood *et al.*, 1994), more demands associated with the illness (Stetz, 1987) and more unmet needs for help with household tasks (Allen, 1994) with male caregivers. After the person is identified as the one who is the main reference for the patient, it should be useful to provide her with social support. This could be addressed to both the health care professional assistance (50% of the relatives are forced to administer injections to the patients) and to less qualified, daily activities, in particular to those related to the personal care of the patient (77% of the caregiver's activity is somehow related to washing and cleaning).

The total cost for the family is quite high, about $1500-2000 \in$ per month, which represents not much less than the average family income in Italy. Of course, this is much less than the cost for a full-time hospitalization, which should roughly account for about $4500 \in$ per month. Nevertheless, it has to be recognized that most of the home care costs are indirectly (and hidden) imputed to families as the assistance is intense and continued.

This study has the important limitation of not considering indirect costs (loss of productivity due to assistance, social and relational impact of assistance for the closest relatives) in the computation of the overall burden of the home care assistance, thus making these estimates somehow conservative. These points constitute perhaps the pattern for future research in this field.

The small sample and the high number of missing values, and the specific regional environment where the investigation was conducted are surely limiting the generalization of this study results. The Friuli Venezia Giulia region is actually characterized by a sort of "rural" relationships, with the children being close to the

parents up to the end of their life. This model can hardly be exported to other situations (like metropolitan areas), limiting therefore the interpretation of the study results. Nevertheless, the indication that at least "some" costs are in charge of the families (perhaps inappropriately) is clearly emerging from this research.

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