

A NEW FAMILISM SCALE FOR USE IN DIVERSE POPULATIONS

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ABSTRACT

Familism has evolved substantially over its history as a concept. It has been applied in both limited and broad ways, leading to conceptual confusion. To clarify the nature of familism, we evaluate its history, development, and conceptual underpinnings and propose a revised, cross-cultural understanding of familism. We present a new scale for measuring familism in diverse populations, with a particular emphasis on how such a scale can be used in social psychological research. We conclude by outlining potential next steps in the study of familism in previously neglected groups of familists.

Keywords: Familism, Amoral Familism, Social Psychology, Group Identity

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Chapter I. Introduction

Background

There is, perhaps, no greater subject of inquiry for the social sciences than the emergence of collectivities. The question of *why* we organize ourselves has been grappled with since at least Hobbes but has mostly been replaced with the question of *how* we organize ourselves. Grand theories borrowed from the humanities and natural sciences, such as structuralism (Lévi-Strauss, 1955) and systems theory (Easton, 1953) are major contributions. These theories diverged from earlier models of social theory, which were grounded in the division of labor (Durkheim, 1893), class relations (Marx, 1867) and religious association (Weber, 1904). They instead center interpersonal relationships in the study of groups.

Social psychology was born out of this shift toward an interpersonal focus as concepts like affiliation, belonging, social cognition, and social influence gained greater attention. However, in focusing on the interpersonal dimension, social psychology lost sight of the broader systems and structures of collectivities and the important differences between different types of groups.

The study of familism is one attempt to rectify this. As the name implies, familism centers the family as the central group of concern. Those who study familism seek to understand what differentiates family groups from non-family groups, and how a special sense of attachment to the family in a subset of the population affects individual psychology and interactions with broader society. Familists hold very different assumptions about the world than do modern, Western societies. As a result, they are differently predisposed in the ways they interact with the world. For example, Western societies, with their Enlightenment heritage, tend to value the

universal community of man, ordered liberty, equality, nonviolence, and capitalist economic organization, whereas familists seem opposed to all of these to some degree. They explicitly reject universal community in favor of the community of the family, support natural liberty rather than society-level, top-down ordered liberty, nepotism rather than equality, accept violence as a means for defending family interests, and act in ways that are economically pragmatic rather than idealistically committed to market principles.

Likewise, familist societies (defined as those in which a majority of persons and families are predisposed in such a way) scarcely resemble modern western society. They appear peculiarly antisocial, “amoral” even—a paradoxical mix of individualism and collectivism, hierarchy and egalitarianism, violence and order. However, this is surely a failure of our existing categories, which are rooted in a tradition of Enlightenment Liberalism that familists do not share. A detailed study of familism and familists will reveal an internal logic to this form of social organization, that is self-consistent even if it scarcely resembles our own. Its basic orienting principle is the family, and through this lens its peculiarities appear quite reasonable. In the process of better understanding the idiosyncrasies of familism, we may come to a better understanding of the idiosyncrasies of our own society.

The family has existed in every time, place, and human culture. It is such a universal institution that we often overlook the substantial differences among different models of family. Modern life in the West is centered around an idealized nuclear family consisting of a mother, father, and 2 children, with a loose network of aunts, uncles, cousins, and grandparents who may or may not be present in daily life. These nuclear units often move far away from extended family networks and are often dissolved through divorce. But this is a comparatively new, and

particularly Western concept of the family. In other times and places, “the family” has been conceived more laterally and intergenerationally, with grandparents often taking on a larger role in raising children and extended family being coextensive with one’s social network.

The modern family ethos is less rooted in family obligations and, consequently, family obligations affect individual behavior much less than was historically the norm. In one sense, familism is the default state of being and we are the anomaly. Familists today only appear aberrant because of our own cultural aberrancy. Thus, a study of modern familists allows us a window into the old way of doing things, and sheds light on how we have come to take for granted our model of family life.¹

Familism has always been studied interdisciplinarily, with meaningful contributions by sociologists, historians, and, more recently, clinical psychologists. The concept of familism originates from the Chicago School of Sociology, most notably with the work of Ernest Burgess (1926, 1945, 1963). Burgess’s “ideal-type familism” posited five dimensions: strong in-group feelings, emphasis on family goals, common property, mutual support, and the desire to pursue the perpetuation of the family (Bardis, 1959). Burgess provides us with the original definition of *attitudinal familism* which, along with *behavioral familism* and *structural familism*, forms the tripartite model of familism now common in the literature (Valenzuela & Dornbusch, 1994).

Burgess, along with Locke and Thomes (1963), defined attitudinal familism as:

- 1) the feeling on the part of all members that they belong pre-eminently to the family group and that all other persons are outsiders;
- 2) complete integration of individual activities for the achievement of family objectives;
- 3) the assumption that land, money, and other material goods are

¹ Jack Goody (1983) suggests a material basis for the idiosyncrasies of western family life in *The Development of the Family and Marriage in Europe*. According to Goody, the outlawing of cousin marriage by the Catholic church had the effect of breaking up clans in most of Europe. As a result, the nuclear family took hold in the areas where Catholic influence was the strongest, but not on Europe’s fringes. This led to a more familist ethic in places like Scotland, but not in England or Germany.

family property, involving the obligation to support individual members and give them assistance when they are in need; 4) willingness of all members to rally to the support of a member if attacked by outsiders; and 5) concern for the perpetuation of the family as evidenced by helping adult offspring in beginning and continuing an economic activity in line with family expectations and in setting up a new household.

We will see, however, that this definition and the tripartite model both have significant issues. For instance, attitudinal familism has come to supplant the broader concept of familism in the literature, with behavioral and structural elements often overlooked or minimized. Similarly, it is not obvious that the economic focus of 3) and the centering of parental obligations towards children of 5) hold up across cultural contexts. Though an imperfect starting place, from here familism was taken up by several researchers, of whom two stand out both for their elaborations upon the concept and for the extent to which they diverged from one another.

Edward C. Banfield was a near contemporary of Burgess at the University of Chicago. He pioneered the concept of “amoral familism” based on an ethnographic study of southern Italy in *The Moral Basis of a Backward Society* (1958). In this work, Banfield recognized the moral dimension of familism where Burgess had not. What Banfield observed in southern Italy was a culture defined by “...the inability of the villagers to act together for their common good or, indeed, for any end transcending the immediate, material interest of the nuclear family.” He labeled this ethos “amoral familism,” given his assumption that morality is an intrinsically social project.

The villagers of Montegrano, he claimed, failed to recognize the broader social context within which they lived. As a result, their familism led to an amoral orientation toward others. The essential takeaway from Banfield’s work is that a familist ethic leads to a certain moral disposition, different from that fostered by the Western nuclear family. This insight serves as a

basic assumption of our research into familism. Banfield also argued that familism was active at the level of whole societies, as an *ethos* in Weber's sense of the word, rather than merely at the level of families *per se*.

Despite not being a member of the Chicago school, Panos Bardis was a closer acolyte of Burgess than Banfield. His major contribution to familism was the development of a scale capable of differentiating familists from non-familists (1959). Though the scale was criticized in its own day (Rogers & Sebald, 1962; Blair, 1972), it became the basis of all subsequent familism scales, including our own.

From this origin point, the study of familism expanded and fragmented further. Researchers applied it to a wide variety of cultures, freely mixing it with concepts derived from indigenous cultures and other theoretical work on the family. For example, familism has been taken up by Japanese researchers, mixed with Doi's concept of *amae* (1971) and applied to a wide array of social spheres including work culture (through the concept of "corporate familialism;" Sumi, 2019). We also find references to "familialism," "family solidarity," "family integration," or "intergenerational solidarity" in the literature (Steidel, 2003) when the authors are really referring to attitudinal familism, as defined by Burgess. This has led to conceptual confusion that has yet to be resolved.

One tack has been leaning into cultural segmentation and subdividing the study of familism into ethnic enclaves (Zinn, 1982). However, this has, in effect, transformed familism into a concept that is *only* recognized within certain cultures, most notably Latin American populations (Steidel, 2003). This is a great loss to the broad applicability of familism presupposed by Burgess, Bardis, and Banfield. In the interest of reviving broad applicability, a

new scale is necessary; not one that is “for use with Latino populations” but one that detect familism in diverse populations. This requires a “back to basics” approach to the concept of familism that isolates it from other related concepts and from circumstantial cultural differences.

Theory of Familism

Familism was first recognized as a significant cultural value for Latinos in the 1970s and 80s (Moore, 1970; Alvirez et al., 1976; Zinn, 1982; Sabogal, 1987). This was based on observations of higher birthrates and more pro-natalist sentiments among Hispanic Americans when compared with non-Hispanic Whites (Pachon & Moore, 1981), self-report of the dimensions of familism (Alvirez et al. 1976), and application of the Bardis scale (Sabogal, 1987). Later research correlated this cultural value among Hispanics with acculturation (Sabogal, 1987), physical and mental health outcomes (Perez, 2014), and other Hispanic cultural values such as *respeto* (Lopez, 2022). While some research has shown that other minority groups such as Black and Asian Americans endorse familist values highly, it has been maintained that aggregate levels of familism are highest in Hispanics and lowest in non-Hispanic Whites (Schwartz, 2007).

Our contention is that this finding is less indicative of familism being a cultural value that is especially found in Hispanics than it is of a failing of our ethnic categories. We believe it to be the case that while non-Hispanic White Americans in aggregate may demonstrate lower levels of familism, a certain ethnocultural subset of whites is likely to endorse familist values at rate comparable to Hispanics. In other words, White Americans are not a monolith when it comes to familism. An essential task going forward is finding a meaningful way to segment the white population along ethnocultural lines.

In expanding the concept of familism beyond the confines of Hispanic culture, we are particularly interested in America's oldest group of familists, the Scots-Irish, whose culture persists throughout much of Appalachia and the rural South. Thus, we choose as our conceptual starting point a historian of American folkways and critic of Banfield, David Hackett Fischer. In his work *Albion's Seed*, Fischer contrasts the folkways of four British cultures that were transmitted to America in the Colonial era. Of particular interest for our purposes is his comparison of the family-ways of Puritans, Quakers, Cavaliers, and Scots-Irish settlers. In the broadest possible sense, all these groups, except the Quakers,² can be considered familist—each prioritizing family obligations in their own way. A cursory survey of their similarities and differences will help reveal the essence of familism and narrow our focus.

The Puritans and Cavaliers both conceptualized family in two tiers: the inner circle of the nuclear family and the outer circle of the extended family who shared a common ancestor with the nuclear family. Beyond the sphere of the family was broader society which, due to the material realities of settlement in America,³ consisted of a web of marriage alliances. Fischer reports that in any given Virginia county prior to the American Revolution, a few surnames would prevail and scarcely anyone could be found who was not related by blood or by marriage to every other inhabitant. The Massachusetts Bay colony operated similarly in its earliest days. However, this region received greater immigration than Virginia, and so gradually a gap between the family and non-family spheres of society emerged. In this way, the Puritans transformed into

² Fischer describes how, from the very beginning, the religious dispositions of Quakers led them to not distinguish between family and non-family members, subsuming all in equality under the "Society of Friends."

³ Namely, low population density.

a non-familist society, securing social ties through the deliberate severing of nuclear family ties through “sending out” children to live in the households of non-family members.

Unlike the Cavaliers and Puritans, Scots-Irish immigrants did not make significant distinctions between the nuclear and extended family. Their model, a modification of the Scottish clan system, was much more lateralized. Fischer claimed that this led to a less hierarchical society than in Virginia proper. That being said, Scots-Irish culture was far from Popper’s ideal of the Open Society. Rather, family (in the broad sense) defined the bounds of the moral universe. Of this, Fischer says the following:

These clans fostered an exceptionally strong sense of loyalty, which a modern sociologist has called “amoral familism,” from the ethical perspective of his own historical moment. In its own time and place, it was not amoral at all, but a moral order of another kind, which recognized a special sense of obligation to kin. That imperative was a way of dealing with a world where violence and disorder were endemic. Long after it had lost its reason for being, family loyalty retained its power in the American backcountry.

It is worth noting that the Scots-Irish model differs from Banfield’s amoral familism to which the quote alludes. According to Banfield, the familism of southern Italy was characterized by the absence of an institution of the extended family—which he viewed as a form of scaffolding to broader social participation. In the absence of an extended family, no broad conception of “society” could ever form.⁴ In the interest of staying true to the theoretical perspectives that underpin familism as a concept, we must therefore conclude that whatever familism is, the presence or absence of extended family networks cannot be integral. We must

⁴ It is worth noting that Banfield was widely criticized in his own day for ignoring the integral role that grandparents and other extended family members play in southern Italian culture (Ferragina, 2009). However, for the sake of argument, we will take his characterization at face value.

regard both groups as familists, varying in their definitions of the family, but not in their orientation towards the family.

When we compare these two groups with the Cavaliers of Virginia, a particular quality emerges that is essential to familism: *However the family is defined, within its bounds the familist is essentially egalitarian.* This is the case for the familists of southern Italy and for the Scots-Irish of America, but not for the Cavaliers, leading us to conclude that the latter cannot be meaningfully called familists—no matter how strongly they maintained their model of family.

Banfield notes the great sacrifices that both parents and children made prior to the child's marriage. After this transitional moment, the family as formerly defined broke down and two families replaced it. Within these new families, the amoral familists continued to be egalitarian, sharing resources freely in a bond of mutual respect and affection. In this regard, they share much in common with the Scots-Irish, even though for these clannish familists, family disintegration was a conceptual impossibility.

These two observations are at the root of why a new scale is necessary. Examining the Bardis and Steidel scales, we find that both include aspects of intra-family hierarchy and rigidly defined family bounds. We view these elements as inessential and culturally relative. To develop a familism scale capable of use in diverse populations, removing these aspects is a necessary first step.

Comparison and Explanation of Items

As mentioned, the Bardis scale contains five factors—1) strong in-group feelings, 2) emphasis on family goals, 3) common property, 4) mutual support, and 5) the desire to pursue the perpetuation of the family—while the Steidel scale contains four—1) Familial Support, 2)

Familial Interconnectedness, 3) Familial Honor, and 4) Subjugation of Self for Family. In developing our scale, we also posited five dimensions including what we find to be essential in the other scales while emphasizing other aspects of familism that we found lacking. Our 5 dimensions are: 1) Family Support (which encompasses Bardis's (B) dimensions 2, 4, and Steidel's (S) dimension 1, 2) "I Like My Family" (B1, S2), 3) Identification w/ Family, 4) Primacy of Family, and 5) Moral Familism (B5, S3).

It is worth noting that our dimensions 3 and 4 are made entirely of items not found in the other scales (as seen in **Table 1**). It is not that these dimensions are lacking in the theoretical perspectives that inform prior scales but rather that they lack adequate operationalization within the scales. Further, our item 5 encompasses both the perpetuation of the family of Bardis and Family Honor of Steidel but refines these dimensions in line with the broader conception of the moral dimension of familism suggested by Banfield.

We also added items that reflect certain elements of familism that are conspicuously missing from prior work. For instance, we note a lack of items that focus on the *qualia* of the familist worldview. While the Steidel dimension of Subjugation of the Self approaches a description of the qualitative experience of familism, it does not go far enough in this. Further, the experience of being a familist should not be thought of as a negative affective state. We contend that familists receive enjoyment in knowing themselves to be a part of their family, in activities done with their families, and even in sacrificial actions taken for the sake of the family. This led us to add items that we categorized under the category of "I like my family" (Items 20, 21, and 22).

Table 1
Comparison of Scale Items

Item	Scale		
	Bardis	Steidel	New
1	A person should always support his uncles or aunts if they are in need.	A person should live near his or her parents and spend time with them on a regular basis.	A person should feel ashamed if something they do dishonors the family name.
2	Children below 18 should give almost all their earnings to their parents.	Aging parents should live with their relatives.	A person should always be expected to defend their family's honor no matter what the cost.
3	The family should consult close relatives...	A person should help his or her elderly parents in times of need...	A person should always be expected to defend their family against outsiders even at the expense of his own personal safety.
4	Children below 18 should almost always obey their older [siblings]	Children should always help their parents with the support of younger siblings....	You cannot be considered a good person if you don't take steps to benefit your family.
5	A person should always consider the needs of his family... more important	A person should rely on his or her family if the need arises	If my family obligations prevent me from acting morally, I will abandon the family obligations.
6	At least one married child should be expected to live in the parental home.	A person should always support members of the extended family....	A person should rely on their family above all other people if the need arises.
7	A person should always be expected to defend his family against outsiders	Parents and grandparents should be treated with great respect regardless...	A person should always consider the needs of their family more important than their own.
8	The family should have the right to control the behavior of each of its me	A person should often do activities with his or her immediate and extended families...	A person should always be completely loyal to their family.
9	A person should always support his parents-in-law if they are in need.	The family should control the behavior of children younger than 18.	Being distinct from my family is important to me.
10	A person should avoid every action of which his family disapproves.	A person should cherish time spent with his or her relatives.	A person should live near their parents (and spend time with them on a regular basis).
11	A person should always share his home with [relatives]...	Children should help out around the house without expecting an allowance.	People might be members of many groups, but none are as important as family.
12	A person should always be completely loyal to his family.	Children younger than 18 should give almost all their earnings to their parents	The family you choose is more important than the family you don't.
13	The members of a family should be expected to hold the same... beliefs.	A person should feel ashamed if something he or she does dishonors the family name.	The only place I know I belong is in my family.
14	Children below 18 should always obey their parents.	Children should live with their parents until they get married.	I don't like to rely on people who aren't my family.
15	A person should always help his parents with the support of his younger brothers and sisters if necessary.	A person should always be expected to defend his or her family's honor no matter what the cost.	A person should always support members of their extended family if they are in need, even if it is a big sacrifice.

Table 1 Continued

16	A person should always share his home with his parents-in-law...	A person should respect his or her older brothers and sisters regardless of their differences in views.	If a person must choose between family and friends, they should choose family every time.
17		A person should be a good person for the sake of his or her family.	Parents and grandparents should be respected regardless of any differences in views.
18		Children should obey their parents without question even if they believe they are wrong.	I seek input from close relatives concerning important life decisions.
19			A person should always avoid actions that threatens the integrity of the family.
20			A person should very regularly do activities with their immediate and extended family (for example, eat meals, play games, or go somewhere together) even if the person has other pressing obligations.
21			Activities always feel more meaningful when I'm doing them with family.
22			I often wish that I had grown up in a different family.

In addition, we conceptualize the familist family as a whole or gestalt that is not reducible to the sum of its parts. The basic moral orientation of the familist is towards the cohesion and perpetuation of this whole, even when the individual self is subordinated as a result. Thus, we included the reverse scored items (5, 9, 12, and 22) that ask participants to judge the extent to which they are willing to dissolve and replace the family with another group (e.g. “the family you choose is more important than the family you don’t”).

The family for familists is not fluid; it is not an open system.⁵ This separates it from other groups that are based on the free association of individuals, capable of being formed and dissolved at the convenience of the members. Familist families are in theory permanent—though, as in the case of southern Italy, this is not always the case in practice—and decidedly inward looking and insular. To be a familist, one must be skeptical of other groups and must view other groups as transient in a way that the family is not. Thus, we included items such as 14 (“I don’t like to rely on people who aren’t my family”) to capture this insularity.

For the sake of analyses, we found it useful to divide items between those that are purely descriptive (“Being distinct from my family is important to me”) and those that make normative claims (“A person should feel ashamed if something they do dishonors the family name”). This follows our discussion of the importance of the moral dimensions of familism and so it is of

⁵ This is evidenced by the peculiar approach to marriages within both old-world Scots-Irish and southern Italian communities. For the Scots-Irish, marriage was a fully contingent relationship that could not make a spouse a part of the Clan. Instead, it was expected that when members of two different clans married, they would retain all prior loyalty to their clan of origin, even if to the exclusion of their spouse and their spouse’s clan. As a result, the norm was always marriage within the clan. In the case of southern Italians, marriage was the symbolic death of the former family. A child after marriage established a new family that replaced his family of origin as the center of moral concern. Banfield notes that as a result, marriage led to a collapse in obligations between parents and children.

particular interest how these normative items differ from the descriptive items. It is worth noting that prior scales include a mix of both, but did not distinguish them as clearly as we attempt to.

Our research is oriented towards elucidating the properties of our scale and its relationship to other scales with established validity. Given our conceptual clarifications and changes to the operationalization of familism, it is important to establish construct validity by testing whether it correlates with other constructs in the literature. For example, prior research identified familism as a protective factor against persistent negative emotional states and so we would expect to find a negative correlation between familism and depression in our sample. Further, familism is conceptually related to established social psychological constructs such as fusion and so we would expect to find a meaningful relationship between our scale and it.

Chapter II. Methods

Participants

Our participants were 1738 students enrolled in introductory psychology courses, who completed a prescreen survey involving our own and other scales. There were two attention checks included in the survey. 179 participants failed at least one of these checks, leaving us with 1559. Of these, 1071 were female and 487 were male; 1214 were non-Hispanic White, and 122 were Hispanic, with the remainder being roughly evenly distributed among Black, Asian, and Bi-racial/other participants. The mean age was 18.83 with a minimum age of 18 and a maximum of 26. 65% of our sample self-identified as from a suburban background, 19.8% identified as from a rural background, and 14% identified as coming from an urban background.

Assessments and Measures

The familism scale was included as part of a prescreen survey administered to all introductory psychology students at the University of Tennessee at the beginning of each semester. Students completed the survey on personal devices through the University's SONA software. It was administered alongside several other scales, including the MCPR (Motivation to Control Prejudiced Reactions), FusionUS scale, FNE scale (Fear of Negative Evaluation), the CESD (Center for Epidemiological Depression) scale, and the BSRI (Bem Sex Roles Inventory) as well as others which are not relevant to our analyses.

Our familism scale consists of 22 items evaluating the theoretical dimensions of familism outlined in the introduction. These include similar attitudinal and behavioral aspects ["A person should live near their parents (and spend time with them on a regular basis)"] tapped by prior scales, as well as items oriented towards the moral attitudes of familism ("You cannot be

considered a good person if you don't take steps to benefit your family") elaborated by Banfield. Unlike prior scales, our scale lacks items that presuppose a hierarchical model of family (Bardis: "Children below 18 should give almost all their earnings to their parents") or other culturally bound patterns of family life (Steidel: "Children should live with their parents until they get married"). This yields a scale that is broader in the dimensions of familism it measures, and more cross-culturally valid due to its elimination of non-essential idiosyncrasies in the ways particular families are organized, though subsequent work is needed to confirm this.

The MCPR (Motivation to Control Prejudiced Reactions) scale measures individual prejudice in terms of internal "concern for being prejudiced" and external "restraint to avoid dispute" factors (Dunton and Fazio, 1997). We predicted based on our theoretical understanding of familism, that they would exercise less restraint in controlling prejudiced reactions when compared with non-familists, while not differing in individual "concern." This is because familism presupposes that familists are more concerned with their standing within the family and the perceptions of family members ("I seek input from close relatives concerning important life decisions"), while "restraint" in the MCPR is primarily with reference to broader society ("In today's society it is important that one not be perceived as prejudiced in any manner").

The sphere of "society" categorically holds no bearing on a familist's self-concept and will diminish in influence in proportion to how familist a person is. This does not mean, however, that a familist will lack "concern" for the struggles of marginalized groups—they may even show heightened "concern" if they identify with the marginalized group or perceive themselves to be marginalized in some way—only that their motivations will not be determined by social expectations in the way that a non-familist's might be.

The FusionUS (Gomez et al., 2011) scale measures the extent to which an individual views their self-identity as “tied up” with (fused to) their national identity as a citizen of the United States (“I am one with my country”). There are two theoretically plausible relationships we could see between familism and fusion. Identity may be conceived of as a “zero-sum game” in which the salience of one identity diminishes the salience of other identities. If this were the case, then we would expect familists to identify less with their Nation. Alternatively, it could be the case that lower order identities are nested within higher order identities and, consequently, provide scaffolding for identification with groups that supersedes them. This is to say, that “the family” may be conceived of as a subset of the nation, and, thus, to identify strongly with the former is to necessarily identify strongly with the latter.

The FNE (Fear of Negative Evaluation) scale measures individual concern with how others view oneself and fear of being evaluated negatively (“I am unconcerned even if I know people are forming an unfavorable impression of me”). As previously mentioned, we predict that familists will be less concerned with the evaluations of non-family members and more concerned with the evaluations of family members. While the FNE does not specify *who* is doing the negative evaluations, it is probable that the language of “people” would be interpreted as non-familial. If this is true, then we should expect familists to show lower fear of negative evaluation.

The CESD (Center for Epidemiological Depression) scale measures the frequency of negative emotional states in the prior week, from “rarely” to “most of the time (5-7 days).” We predict that familists will be relatively less prone to depression than the general public. This is because the family constitutes a source of constancy and emotional stability for the familist that diminishes negative emotional responses to negative experiences in daily life. This is in line with

prior work on familism as a protective factor against depression and anxiety in Latino populations (Valdivieso-Mora, 2016). If this holds true for familists across demographic groups, it will help to establish the cross-cultural and predictive validity of our scale and the construct validity of familism as we have conceptualized it.

The BSRI (Bem Sex Role Inventory) assesses the extent to which a person views men and women as “competent” or “warm.” Bem (1974) suggests that gender stereotypes hold women to be warm but not competent, and men to be competent but not warm. Thus, by asking participants the extent to which they associate warmth- and competence-related words with men and women, we can assess the extent to which they endorse gender stereotypes. We utilized the BSRI as a measure of gender stereotyping and belief in traditional gender roles to see whether familists hold more stereotypical views of men and women than the general public.

Chapter III. Results

Scale Properties

We first examined the psychometric properties of the scale. Cronbach's Alpha was .90. Scores were relatively normally distributed (skewness = -.34, kurtosis = .39), with a mean of .08 ($SD = .84$), a minimum of -2.9, and a maximum of 2.6 (range = 5.6).

Demographic Differences

Contrary to prior work, we found no significant difference between levels of familism in Hispanic ($M = .06$, $SD = .83$) and non-Hispanic populations ($M = .08$, $SD = .83$), $t < 1$.

Men showed significantly higher rates of familism ($M = .38$, $SD = .79$) than women ($M = -.06$, $SD = .83$), $t(1526) = 9.81$, $p < .001$. This remained even when politics was controlled for in a simultaneous regression ($B = .14$), $t(1245) = 5.23$, $p < .001$ and when gender stereotyping effects were controlled for using the BSRI, ($B = .15$), $t(1241) = 6.20$, $p < .01$. Interestingly, familists showed a partial inversion of gender stereotype effects moderated by sex when compared with non-familists, with male familists viewing women as more competent ($r = .102$, $p = .03$), but not as warmer, and men as both competent ($r = .182$, $p < .01$) and warm ($r = .107$, $p = .02$). Female familists viewed men as warm ($r = .177$, $p < .001$) but not as competent, and women as both warm ($r = .132$, $p < .001$) and competent ($r = .185$, $p < .001$).

When we split the scale between items that are purely descriptive ("I seek input from close relatives concerning important life decisions.") and items that are normative ("A person should feel ashamed if something they do dishonors the family name.") we found that the gender differences were primarily driven by the normative items. Across the board, participants scored higher on descriptive items ($M = .29$, $SD = .84$) than on normative items ($M = -.05$, $SD = .98$; t

(1525) = 16.42, $p < .001$). Men scored higher on both descriptive ($M = .38$, $SD = .78$) and normative ($M = .39$, $SD = .91$) items than did women. This difference was driven primarily by the normative items (women's $M = -.24$, $SD = .95$) and not the descriptive items (women's $M = .25$, $SD = .86$), yielding a sex X item-type interaction of $F(2, 1523) = 70.48$, $p < .001$.

Contrary to our theoretical assumptions, we found no significant differences between urban, suburban, and rural participants.

Relationships to Other Variables

There were significant negative correlations between familism and both fear of negative evaluation ($r = -.102$, $p < .001$) and depression as measured by the CESD ($r = -.229$, $p < .001$). These correlations differed between men and women, with both men ($r = -.121$, $p < .001$) and women familists ($r = -.214$, $p < .001$) showing lower rates of depression than non-familists and men alone ($r = -.129$, $p < .001$) showing lower fear of negative evaluation while women familists did not differ from their non-familist counterparts.

Familists showed significantly less concern on the MCPR ($r = -.105$, $p < .001$) but not on restraint, $p > .5$. Once again, this varied by gender with female familists alone showing significantly less concern ($r = -.078$, $p = .02$) and males' familism not correlating significantly on either dimension, p 's $> .5$.

Familism was moderately positively correlated with both Fusion with the US ($r = .55$, $p < .01$), and Social Conservatism ($r = .48$, $p < .01$).

Chapter IV. General Discussion

These results present several conceptual difficulties while also confirming several key points about familism outlined in the introduction. To begin with, we found differences between groups that require explanation. Prior research on familism has indicated that Hispanic immigrants are particularly high in the construct, marking it as a significant cultural value. However, we found no differences between Hispanics and non-Hispanics. There are two possible explanations for this. Either a) we have accomplished our purpose in removing culturally relative aspects from our measure of familism, or b) we have sampled a group of Hispanics who are in some way atypical and non-representative of Hispanics at large.

There is good reason to think that both partially explain our results. Prior work has shown that hierarchy is tied up with Hispanic culture due to the particulars of their colonial past (Ruiz, 2005) in a way that could very well translate into family dynamics.⁶ One of our goals in creating a new scale was to treat such hierarchical elements as incidental and thus remove them in order to make a more widely applicable measure of familism. In addition, there are limitations to utilizing a sample of college students, particularly when it comes to familism. College students are, for a wide variety of reasons, not representative of wider society. They are in a period of great personal change in which many aspects of their identity are in flux. Further, they are so young as to not, by and large, have families of their own.

⁶ When contrasted with English settlement in North America, Spanish settlement in the New World was much more top-down and hierarchical. The Spanish colonies were ran more or less as corporate dictatorships, instead of as semi-self-governing settler colonies. This could be a result of religious differences between Protestants and Catholics of the type Weber describes. Regardless, these differences in settlement patterns have led to a more patriarchal and authoritarian model of social life in Latin America than in English North America.

Finally, and perhaps most critically, college selects for individuals who are willing to move, often great distances, away from their families, meaning that there is a certain degree of familism supposed in all college students. It is very likely that the sample of Hispanic individuals we have is skewed in just such a way. Therefore, it is likely that the parity of Hispanic and non-Hispanic participants on our measure of familism is due to us having selected a group of Hispanics that are abnormally low on the construct, rather than our scale having reduced all populations to parity on familism.

Similarly, there is the issue of the differences between urban and rural participants. All aspects of the theory driving our research would suggest that rural people should be higher on measures of familism. Rural populations are, on average, less mobile, with stronger norms of insularity and family relations (Elder, 1996; Garasky, 2002). In addition, given that most students at our University are from Tennessee and surrounding states, they will disproportionately be of Scots-Irish descent. A critical piece of Fischer's initial argument for cultural continuity between settler populations and modern populations is that cultural specificity thrives on the fringes (i.e. in rural areas). Thus, we would expect that the rural students in our sample would show markers for traditional Scots-Irish cultural values, of which familism is preeminent.

However, this was not what we found, leading us to conclude that there is something atypical about the rural participants in our sample. Similarly to the Hispanics in our sample, it is likely that the college environment has selected for the rural individuals lowest in familism, those who wanted to "get away," as it were. In addition, Southern culture skews things in another way. There exists here a glorification of rural identity, meaning that self-report is an inadequate

measure. Tennessee has been a hub of southern culture for decades, with Nashville, Knoxville, and Memphis playing important roles in the country, western, and bluegrass genres. All three of these genres are closely associated with rural identity, both in their origins and aesthetic choices. As a result, it is likely that many suburban and even urban individuals from the state have identified themselves as rural for cultural reasons. Thus, for such a dimension to be meaningful, a more robust measure than self-report would be necessary.

In our questionnaire we asked participants for their state and county of origin. However, to the “county” question, over half of the participants misread it as “country” and so responded with “USA” or some variation. In addition, we lacked any a priori reason to divide state of origin into meaningful groupings and so could make no use of this marker either. Such a division may be possible and meaningful, though the field of regional American ethnography is lacking in this regard.⁷ It is worth noting that even with our imperfect measures, students who reported “Knox” as their county of origin showed significantly higher levels of familism than participants not from Knox county ($M = .18, SD = .80$ vs. $M = .07, SD = .85, t(1527) = 3.16, p < .001$). This is a promising finding. It suggests that some combination of attachment to place of origin, Scots-Irish identity, and rural identity may predict familism.

The consistent differences shown between men and women on familism and its subcomponents, even when things like gender stereotyping and politics were controlled for, presents further conceptual difficulties. There are several possible explanations for these

⁷ For instance, a systematic study of the ethnocultural origins of modern Americans of European descent is all but absent. Most attempts have utilized self-report measures, which cannot adequately measure the cultural composition of any given area. Some work has been done to use census data and surname frequencies to estimate the percentages of particular cultures in individual counties across the US. However, this has mostly been limited to census data prior to the 19th century and has focused mainly on counties east of the Mississippi. The task of systematically accounting for the cultural legacy of different regions of the US is enormous and has just started.

differences, many of which we tested. The simplest explanation is that women are simply lower in familism. There is very little in the literature that would suggest this to be the case and even some evidence that the reverse should be true. For instance, there is evidence that, for reasons of differential socialization, Hispanic girls demonstrate stronger integration in the family than Hispanic boys (Lorenzo-Blanco et al., 2012). Further, it is theoretically plausible that men and women relate to their families of origin in ways that favor female attachment. The norm across time and place has been that men “strike out on their own” and forge their own path apart from their family of origin. Likewise, masculine behavioral norms would seem to value family formation less than feminine norms. Further, research shows that a woman’s family of origin remains more salient after marriage than does a man’s (Chan, 2000).

There is clearly fruitful territory to be explored in the idea of differential socialization, family relations, and family obligations between men and women. Fischer identified a pattern of differential parenting styles among the Scots-Irish that resonates with the findings of Lorenzo-Blanco et al. (2012). He described the tendency of this culture to dote on and be highly indulgent to male children while expecting self-sacrifice and domestic virtues from girls.

Likewise, Lorenzo-Blanco et al. (2012) described this tendency toward encouraging self-sacrifice among Hispanic girls. However, they took this as evidence for higher familism among girls, given the assumption that self-sacrifice is the heart of familism. It seems equally likely, though, that self-sacrifice, when compared with the indulgence exhibited towards their brothers, in the context of modern norms of equality and feminism, could foster a kind of resentment and motivation to leave one’s family of origin for girls but not for boys. This might manifest as lower familism among women who have recently escaped their families by going to college.

Alternately, differences in parenting style and socialization could suggest that male and female familists conceptualize and interact with familist values in different ways. If the expectations of men in the familist family are different from women, different items would evoke familism in men than in women. If this is the case, it would suggest that the items in our scale tap into masculine forms of familism to the exclusion of feminine forms. However, it is doubtful that this would fully explain the gender differences we found. A goal of our scale development was to use gender neutral language (“a person” and “I” rather than “He” as in the Bardis scale) and to reduce items to their gender-neutral essence (“sacrifice” and “taking steps” rather than presupposing what form this takes).

There is also our finding that men and women differ (to the extent of a direct inversion from positive to negative) in the way they respond to the normative items in our scale. It is possible that men are simply more likely to make normative claims (indicated by the language of “should” in our scale) than are women. If this were the case, this would provide difficulty for a measure of familism like ours. We contend that normativity (i.e. the moral dimension identified by Banfield) is essential to the concept of familism. If women are more reluctant to answer normative claims in the affirmative regardless of their actual levels of familism, it is unclear how one could ever accurately measure familism in women. Further work is needed to address this possibility.

The most optimistic possibility is that, once again, college students are not representative. Perhaps there is “something in the water” that is artificially inflating male levels of familism and/or artificially deflating female levels of familism. This is, once again, a reason why a non-college sample is essential to the validation of our scale.

Our results on the relationship between familism and negative emotionality as measured by the CESD support our theoretical assumptions. Prior work has indicated that familism serves as a protective factor against negative emotionality and the impact of negative life events. This preliminary work would seem to support that claim.

The relationship between fear of negative evaluation and familism is promising. We hypothesized that familists would be generally less concerned with the thoughts, opinions, and evaluations of non-family members. This was, in fact, the case, though interestingly only for male familists. This could be the result of differences in parenting styles, which according to Fischer had the effect of creating bravado, dominance, and hardheadedness in boys and submissiveness in girls. However, female familists make up for this lack with a greater protection against depression than their male counterparts. Therefore, it is likely that the benefits of familism differ by sex.

It is unfortunate, though not particularly surprising, that familism correlates highly with social conservatism. Much of our work in developing our scale was oriented towards stripping away incidental factors and related constructs. Despite our efforts it is unsurprising that they would correlate. For instance, there is no shortage of conservative politicians who champion the nuclear family and so-called “family values.” Neither of these things define familism—neither a strictly nuclear conception of the family, nor the “family as a model for the state” proposition implied by “family values.” We should, however, not be surprised that they correlate with familism to some degree.

The correlation between familism and fusion would seem to lend support to the scaffolding theory of fusion states (i.e. that fused-ness to family allows for greater fusion with

higher-order collectives). This could operate in one of two ways. Capacity for fusion may expand as individuals become more fused such that fusion to one group (the family) increases an individual's capacity for fusion to another group (the nation). Alternately, familists may read the family into the nation (i.e. when they are responding to items about sacrifice for the nation, they implicitly associate this with sacrifice for their family rather than directly with the abstraction of the Nation). This is plausible given that many threats to the nation will certainly manifest as threats to one's family.

Future Directions

Additional work must be done to validate our scale, including gathering data from a non-college sample and comparing it with other related constructs. Assuming it is valid, it opens the door to an expansion of research on familism beyond the cultures to which it has typically been confined. Of particular interest to the authors is what it can reveal about the idiosyncrasies of the Scots-Irish culture of Appalachia and the rural South. Though we did not find this in our study, the work of Fischer and others suggests that this group differs from other White American subcultures in significant ways. We believe these differences are rooted in the presence of a familist ethic in the ethnocultural descendants of Scots-Irish immigrants.

There are many benefits to be derived from research on Scots-Irish familists. Research on Hispanic familists—primarily first- and second-generation immigrants—has indicated the benefits of familism for acculturation and psychological wellbeing. Imagine what wealth of information could be derived from studying a group of familists who have existed in the American context for upwards of 300 years. Have they faced difficulties like more recent

familist immigrants? Have they overcome them, and if so, how? These are the types of questions future research would seek to answer.

Our work sheds light on a problem that exists in much of modern social science, that is the imprecision with which we define social categories. Throughout much of the literature, unspecified and undifferentiated “groups” are the basic unit of study. For reasons previously outlined, familism calls this assumption into question. Likewise, ethnocultural categories are anachronistic to the point of uselessness. Work in sociology and critical theory has thoroughly deconstructed the category of “whiteness,” for example, yet it persists unquestioned in the social sciences.

Our preliminary work on Scots-Irish familism rests on the hypothesis that a certain group of WASPs—though they be White, in a broad sense Anglo-Saxon,⁸ and majority Protestant—cannot be usefully categorized under such a label. They diverge so widely in moral belief and

⁸ It is true that the Scots-Irish, in the pure sense of the term, are the descendants of the Scottish settlers of the Ulster Plantation in Northern Ireland who often intermarried with the Irish natives. Both of these populations are ethnically Celtic, whereas the Anglo-Saxons were a Germanic tribe who settled primarily in the south of England. However, Fischer’s definition of “Scots-Irish” is far more inclusive. He considers Scots-Irish culture to be a culture of *the borderlands*: the borderlands between Scotland and northern England, Ulster and the surrounding counties, and even Wales and southwestern England. The cultural ethic forged on all of these borders was similar, and upon immigrating to America, emigrants from these regions tended to settle in the same areas, where they freely intermarried. Thus, the Scots-Irish of America are descended from Scottish, Irish, and Welsh Celts, but also from Anglo-Saxons, with minor admixture from other occupants of these regions of the new world, both European and Indigenous.

Further, the use of “Anglo-Saxon” in a broad sense to describe the Scots-Irish is justifiable when we consider the origins of the WASP label. It was coined in order to differentiate the old-stock Americans of primarily British extraction from subsequent waves of European immigration. Prior to 1840, the vast majority of immigrations to America was from the United Kingdom of England, Scotland, (Wales), and Northern Ireland. After this point, waves of immigration from other European countries began. First this was mainly from Ireland, Germany, and Northern Europe, and later from southern and eastern Europe. These groups, while they were (for the most part) considered white, were not Anglo-Saxon (read: British) or Protestant. They cohered into a loosely defined group based on their shared Catholic faith, and were viewed as culturally distinct from, and by, the WASPs. Thus, the non-Anglo-Saxon waves of old-stock Americans became retroactively identified by the Anglo-Saxon label. This applies to our Celts, but also in large part to the Dutch settlers of Pennsylvania and New York. Hence, it is justified for historical, if not for ethnic, reasons to call the Scots-Irish Anglo-Saxon. However, it should not be minimized the extent to which familism was a product of their (largely) Celtic heritage.

social practice—whether that be their tendency toward honor as a social value, their association with natural liberty, or their familism⁹—that they end up resembling minority groups far more than they resemble the archetype of the WASP.¹⁰ A central value of this work is to call into question these assumptions, and to reveal the infinite complexity of American culture that exists underneath our lazy racial categories.

Further work is needed to shed light on the origins and ontology of Scots-Irish familism. Such work, to be fruitful, must be interdisciplinary, relying on prior work in social history, anthropology, ethnography, and sociology to develop a broader theory of familism. This kind of broad view, while uncommon in contemporary social psychology, would be to the great benefit of theory-driven research.

Though purely speculative in nature, we can make predictions based on the Banfield/Fischer model of familism outlined in our introduction as to how familism could interact with other social psychological concepts. One such avenue of inquiry could examine how familism relates to the classic distinction between collectivism and individualism, now called interdependence and independence. Based on the non-interchangeability of groups that familism presupposes, we would expect familists to act collectivistically within the confines of the family and, paradoxically, individualistically in their interactions in other group contexts. This has interesting implications for such things as social adjustment among first-generation college students, antisocial behavior and social participation (read: amoral familism), prejudice

⁹ All of which are identified as unique to the Scots-Irish by Fischer in *Albion's Seed*.

¹⁰ Which has led one author to ask the question of whether they should be treated as an indigenous culture (Khan, 2012).

against outgroup members, and coping strategies following social rejection or interpersonal tragedies.

Another fruitful field of inquiry could be the relationship between familism and cultures of honor. Following the example of prior work (Burgess, Steidel, and others) we hold that family honor is a central aspect of attitudinal familism. Contemporary honor culture literature distinguishes between different types of honor, including individual honor and family honor (Rodriguez et al., 2002b). Subsequent work could examine the relationship of family honor, as defined in the familism literature, to its equivalent in the honor culture literature, with a particular emphasis on how the familist conceives of family honor. It is also worth investigating the connection between the Scots-Irish culture of honor in the American South (which is said to be motivated by individual honor as much, if not more, than family honor) and Scots-Irish familism.

Familism also intersects with several frameworks from evolutionary psychology including selfish-gene theory, group selection, and kin-selection (Neuberg, 2010). It is up for debate to what extent “the family” in familism is conceptualized in explicitly genetic terms. It would be naïve to think it is fully reducible to shared genes, given the presumable existence of adoption in familist families. However, it would be equally naïve to think that genes play no role in the idea of family. Familists, after all, do not view any given group of genetically diverse individuals as a family. In fact, we should expect that such an idiom as one often finds in “corporate families,” “church families” would be distasteful to familists. It would certainly be worthwhile to investigate whether familists view adopted members in the same way as genetic relatives.

Likewise, it is unclear to what extent familism is a viable group selection strategy (Wilson, 2007) or whether it can be reduced to established kin-selection behavior (Hamilton, 1964). One may think, along with Fischer, that familism developed as an adaptive strategy in chaotic social environments. Whether it remains adaptive or has become maladaptive remains to be seen. If mere socioeconomic factors are a standard, it may be that modern familism is maladaptive, given the immense poverty of the regions in which it is likely to persist (Greenberg, 2016; Banfield, 1967).

In line with Banfield's observations about southern Italy, it may be that much of Appalachian poverty is tied to their familist social ethic. Certainly, as with all group survival strategies, familism has tradeoffs. The fact that it *does* persist, despite potential socioeconomic drawbacks, should lead us to ask "Why?" What benefits are provided by familism that compensate for the drawbacks? Or, is this merely a case of inertia? These questions require further exploration that leans on prior work on the benefits of familism to Hispanic immigrants while also recognizing the idiosyncratic elements of Scots-Irish culture and the culture of other groups of familists.

Familism has direct implications for the study of political psychology. Walter Mead (1999) notes that the Scots-Irish were the largest base of support for Jacksonian Democracy, of which FDR's New Deal and Trumpism¹¹ have been interpreted as manifestations. This historical work can be interpreted to suggest that something about the familist ethic is uniquely populist

¹¹ While it may be thought that these are conceptually incompatible political movements, the argument goes that they both, along with the Jacksonian movement itself, were economically populist movements centered around a strong leader. James Webb (2005) argues that in these qualities they mirrored traditional forms of Scottish political organization and so uniquely appealed to the Scots-Irish settlers of America. This is further evidenced by the county level voting records for all three movements closely corresponding to one another.

(i.e. democratic in the Jacksonian sense). This gels nicely with our observation that, within the context of the family, familists are decidedly egalitarian and morally (read: economically) self-interested. It may be the case that every manifestation of Jacksonian Democracy is partially reducible to appeals to material self-interest, equality, and, to a lesser extent, fear of outgroup members made by politicians to familists. Research into the political proclivities of familists would be invaluable to understanding this consistent voting bloc, which some estimates place at upwards of 70 million (Webb, 2005).

There is also interesting experimental work to be done with familism. An evolutionary perspective would suggest that within all of us there is a certain degree of “latent familism” that can be evoked under certain conditions. One could imagine mundane manipulations (such as “remember a time when you felt genuinely cared for by a family member” vs. a non-family member) that could conceivably evoke familism in nominally non-familists. Interesting work could be done to discern how such a manipulation affects prejudice reactions, fusion responses, rejection reactions, and a host of other established constructs in social psychology.

It is our hope that this scale will prove a fruitful addition to research on familism, which takes the concept beyond an ethnically confined concept into a personal attribute that exists in a variety of populations. The horizon is endless in the ways familism can be applied and studied, and this is only a preliminary first step.

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Vita

Jared Galbreath was born and raised outside of Nashville, Tennessee to a Scots-Irish family that has been in the region for over 250 years. Upon completing high school, he attended the University of Tennessee where he majored in Psychology with minors in Philosophy and Business. He first took an interest in familism after the culture shock of college made him realize that his family was quite unlike other families. He pursued this topic in his undergraduate thesis, and in an unpublished book written with the support of an AURA summer research grant. Upon graduating he enrolled in the University of Tennessee's Master's Program in Empirical Psychology under Dr. Michael Olson. He is currently a second-year student in the program.