CHAPTER 5

Equity Theory and Recipient Reactions to Aid*

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REACTIONS OF RECIPIENTS IN RECIPROCAL VERSUS ALTRUISTIC RELATIONSHIPS

Benefits are only acceptable so far as they seem capable of being requited; beyond that point, they excite hatred instead of gratitude (Tacitus, *Annals,* Book IV, sec 18).

Equity theory is intended to be a general theory, useful for predicting human behavior in a wide variety of social interactions. Equity theory has been applied to predict people's responses in such diverse areas as exploitative relationships, philanthropic relationships, industrial relationships, and

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intimate relationships (see Berkowitz & Walster [Hatfield], 1976). In this chapter, we will argue that equity theory can provide an orderly framework for understanding the philanthropist–recipient relation and, more specifically, for understanding the recipient's reaction to aid.

In the study of the philanthropist–recipient relationship, much of the research has been concerned with the *philanthropist* and the conditions that facilitate or inhibit helping. [For reviews, see Bar-Tal (1976), Berkowitz (1972a and b), Rushton & Sorrentino (1981), Staub (1978), and Wispé (1978)]. Much less attention has been focused on how the *recipient* feels about seeking and/or receiving aid. However, in order that aid be given under conditions that facilitate harmonious relations between benefactors and recipients and promote the well-being of recipients, it is important to understand the psychology of receiving help.

In this chapter we explore the relevance of equity theory for understanding recipients' reactions to aid. (See also Hatfield, Walster, and Piliavin, 1978.) We show that equity theory provides a useful framework for understanding why recipients may occasionally react negatively to benefit. Recipient reaction to aid is examined in three types of relationships: exploitative relationships, reciprocal relationships, and true "altruistic" relationships.

The first section presents a brief review of equity theory; the second describes the three types of helping relationships and recipients' reactions in each type of relationship; the final section more specifically compares reciprocal relations with altruistic ones.

EQUITY THEORY: AN OVERVIEW[1]

Equity theory is a strikingly simple theory. It is composed of four interlocking propositions. (See Hatfield and Traupmann, 1980.)

1. Individuals will try to maximize their outcomes (where outcomes equal rewards minus punishments).
2. Groups (or rather the individuals comprising these groups) can maximize collective reward by evolving accepted systems for equitably apportioning resources among members. Thus, (a) groups will evolve such systems of equity, and will attempt to induce members

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[1] For a more detailed explication of equity theory and a review of the voluminous equity research, especially concerning helping relationships, see Walster (Hatfield), Walster, & Berscheid (1978).

to accept and adhere to those systems, and (b) groups will generally reward members who treat others equitably and generally punish members who treat each other inequitably.

3. When individuals find themselves participating in inequitable relationships, they will become distressed. The more inequitable the relationship, the more distress they will feel.
4. Individuals who discover they are in inequitable relationships will attempt to eliminate their distress by restoring equity. The greater the inequity that exists, the more distress they will feel, and the harder they will try to restore equity.

Equity theorists (see Walster, 1975) define an equitable relationship to exist when the person scrutinizing the relationship (who could be Participant A, Participant B, or an outside observer) concludes that all participants are receiving equal relative gains from the relationship, that is, when:

$$\frac{(O_A - I_A)}{(|I_A|)^{K}{}_{A}} = \frac{(O_B - I_B)}{(|I_B|)^{K}{}_{B}}$$

Where I is inputs of participants[2] O the total outcome of participants, and K a computational device. For a review of the other formulae that have been proposed for calculating equity, see Adams (1965), Alesseio (1980), Harris (1976), Moschetti (1979), or Zuckerman (1975).

Definition of Terms

Inputs (I_A or I_B) are defined as "the scrutineer's perception of the participants' contributions to the exchange, which are seen as entitling them to reward or punishment," (Hatfield & Traupmann, 1980, p. 166–167). The inputs that participants contribute to a relationship can be either assets, which entitle them to rewards, or liabilities, which entitle them to punishment.

Outcomes (O_A or O_B) are defined as "the scrutineer's perception of the rewards and punishments participants have received in the course of their relationship with one another." The participant's total outcomes, then, are equal to the rewards obtained from the relationship minus the punishments that incurred.

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[2] The restriction to this formula is that inputs cannot equal zero.

The exponents K_A and K_B take on the value of $+1$ or -1 depending on the sign of A and B's inputs and the signs of their gains (outcomes − inputs). If I and (I − O) are both positive (or both negative) K_A or $K_B = +1$; otherwise K_A and $K_B = -1$.[3]

Who Decides Whether a Relationship is Equitable?

According to the theory, equity is in the eye of the beholder. Observers' perceptions of how equitable a relationship is will depend on their assessment of the value and relevance of the participants' inputs and outcomes. If different observers assess participants' inputs and outcomes differently, and it is likely that they will, it is inevitable that they will disagree about whether or not a given relationship is equitable. For example, an elderly man placed in a public nursing home, focusing on the fact that he devoted many years to his children, may feel mistreated when they refuse to allow him to live with them. His children, on the other hand, focusing on his cantankerous personality, may well feel that they are doing more than enough by visiting him once a week. Moreover, an "objective" observer may perceive the matter in an entirely different way.

The Psychological Consequences of Inequity

According to Proposition 3, when individuals find themselves participating in inequitable relationships they feel distress regardless of whether they are the beneficiaries or the victims of inequity. The overbenefited may label their distress as guilt, dissonance, empathy, fear of retaliation, indebtedness, or conditioned anxiety. The underbenefited may label their distress as anger or resentment. Essentially, however, both the overbenefited and the underbenefited share certain feelings—they both feel *distress,* accompanied by physiological arousal (see Austin & Walster [Hatfield], 1974a, 1974b).

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[3] The exponents are simply a computational device to make the equity formula work. The exponents' effect is to change the way relative gains are computed; if $k = +1$, then we have $(O - I)/(|I|)$, but if $K = -1$, then we have $(O - I) \times (|I|)$. Without the exponent K, the formula would yield meaningless results when a participant's inputs and profits have opposite signs, that is, when participant inputs are less than zero and profits are greater than zero, or when inputs are greater than zero and profits are less than zero. For a complete description of the assumptions underlying equity theory and its derivation, see Walster (1975).

Techniques by Which Individuals Reduce Their Distress

Proposition 4 states that individuals who are distressed by their inequitable relationships will try to eliminate such distress by restoring equity to their relationships. There are two ways by which participants can restore equity: They can restore either actual equity or psychological equity.

Participants can restore *actual equity* by altering their own or their partner's relative gains in appropriate ways. For example, imagine that an unskilled laborer asks for a much deserved raise from a contractor, but does not receive it. He could reestablish actual equity in various ways: He could neglect his work (thus lowering his own inputs), start to steal equipment from the company (thus raising his own outcomes), make mistakes so that the contractor will have to work far into the night undoing what he has done (thus raising the contractor's inputs), or damage company equipment (thus lowering the contractor's outcomes). The ingenious ways people contrive to bring equity to inequitable relationships are documented by Adams (1963).

Participants can restore *psychological equity* to their relationships by changing their perceptions of the situation. They can try to convince themselves and the other that the inequitable relationship is, in fact, perfectly fair. For example, suppose that a subway rider falls down on the subway and is aided by a nearby passenger. The subway rider could try to convince himself that the relationship with this stranger is equitable in various ways: He could restore psychological equity by minimizing the helper's inputs (''It didn't take him *that* much time to give me a hand''), by exaggerating his own inputs (''I was very appreciative''), by exaggerating the other's outcomes (''He probably enjoyed the chance to look good in front of everyone''), or by minimizing his own outcomes (''Well, I did hurt my knee'').

Actual versus Psychological Equity Restoration

At this point, equity theorists confront a crucial question: Can one specify when people will try to restore actual equity to their relationships, versus when they will settle for restoring psychological equity? From equity theory's Propositions 1 and 4, one can make a straightforward derivation: People may be expected to follow a cost–benefit strategy in deciding how they will respond to perceived inequity. Whether individuals respond to injustice by attempting to restore actual equity, by distorting reality, or by doing a little of both, has been found to depend on the costs and benefits participants think they will derive from each strategy (see Berscheid & Walster [Hatfield], 1967; Berscheid, Walster, & Barclay, 1969; and Weick & Nesset, 1968).

THE APPLICATION OF EQUITY THEORY TO HELPING RELATIONSHIPS

Relationships between the help giver and the recipient of help may be characterized in one of three ways. In *exploitative* (or excessively profitable) relationships, it is the philanthropist who is really benefiting from the relationship. In *reciprocal* relationships, equity is maintained over the long run, and the participants alternate between being donor and recipient. In *altruistic* relationships, helpers are truly helping by offering the recipients greater benefits than the recipients could ever return. Although all three of these relationships are commonly labeled *helping* relationships, they are, in fact, strikingly different. Let us proceed to describe these three helping relationships in more detail and review what is known about how recipients react in each of these types of relationships.

Exploitative (or Excessively Profitable) Relationships

Exploitative relationships can be diagrammed as follows:

$$\frac{(O_A - I_A)}{(|I_A|)^{K_A}} > \frac{(O_B - I_B)}{(|I_B|)^{K_B}}$$

Philanthropists are sometimes less generous than they appear to be on the surface. Some philanthropists know they are benefiting more than the recipient. They are fully aware that they are "doing well by doing good." For example, the corporate executive may know full well that charitable contributions will increase the company's relative gains (via the tax write-offs) while doing little or nothing for the recipients. These relationships are best labeled *exploitative relationships*.

Other philanthropists are aware that in the past they have received far more than they deserved, and the potential recipient to aid has received far less. The helper gives in an effort to remedy the inequity *partially*; the recipient accepts it as such. This type of relationship may be best labeled as an *excessively profitable* relationship.

According to Proposition 3 of equity theory, when individuals find themselves participating in inequitable relationships, they will become distressed. Recipients of aid in exploitative or excessively profitable relationships may well feel anger or resentment over being given mere token aid while the philanthropist gains from the relationship. They will probably not feel indebted for the aid. They may even try to restore equity by derogating the philanthropist or by taking more of what they feel they deserve from the philanthropist.

Two factors may affect recipients' reactions to the philanthropist who gains more from helping than they do. First, tolerance for inequity probably varies as a function of the balance of costs and rewards involved in receiving help. To the extent that recipients gain more than they lose, they will probably be inclined to tolerate the continuing inequity: They may conclude that "something is better than nothing" and try to ignore the fact that the philanthropist is reaping an even greater benefit. However, once the benefits begin to be exceeded by the costs of receiving help (costs may include such things as lowered self-esteem, restriction of freedom, or an obligation to repay the help with interest), the inequity may become increasingly intolerable.

A second factor that might affect how recipients react to exploitative benefactors is how *comparison others* are being treated. Thus far, we have assumed that recipients are in a relationship only with the philanthropist; whether or not recipients feel inequitably treated is determined solely by comparing their relative gains with the philanthropist's. However, how recipients react to a particular inequity may be tempered—or exaggerated—by their perception of how similar others are being treated. Recipients of aid may be most content with the status quo if they perceive that others are even worse off.

For a more thorough discussion of exploitative (or excessively profitable) relationships, see Walster [Hatfield], Walster, & Traupmann, 1978.

Reciprocal Realtionships

Reciprocal relationship can be diagrammed as follows:

$$\frac{(O_A - I_A)}{(|I_A|)^{K_A}} = \frac{(O_B - I_B)}{(|I_B|)^{K_B}}$$

Any relationship than endures for very long, soon evolves into a reciprocal relationship. Neighbors take turns manning car pools, colleagues exchange advice, lovers comfort one another when things go awry. In such stable relationships, participants alternate between helping others, and being helped themselves.

Mauss (1954) analyzes the impact of such reciprocal giftgiving in primitive societies. Mauss uses the Melansian institution of the *kula* ring as a framework for discussing reciprocal relationships. In the Massim area of the Pacific, tribal chiefs are linked in the *kula,* in which participants travel from island to island doling out and receiving gifts. By custom, a tribal chief is a donor on one occasion and a recipient on the next. Dillon (1968) observes that in the *kula,* as in our society, "People who receive, want to give something in return. Both are involved in the quest for reciprocity" (p. 15). He points out that the reciprocal exchanges are a source of social stability—they breed good feeling, liking, and cooperation. Experimental evidence supports Dillon's contention that *kula*-type reciprocal exchanges solidify social bonds. For example, Nemeth (1970), Berkowitz (1972a, b), and Gross & Latané (1974) provide evidence that reciprocal helping relations stimulate friendly feelings. Other experiments suggest that kindness generates not only liking but also a desire to reciprocate (Greenberg, 1968; Gross & Latané, 1974; Krishnan & Carment, 1979; Pruitt, 1968).

How do recipients of aid in reciprocal, long-term relationships react to being helped? If we can extrapolate from laboratory studies of relatively short-term relationships, evidence exists to suggest that the recipients' reactions to donors are influenced by two factors: (1) Was the donor's help intentional? and (2) Was the help unselfishly motivated?

As suggested by the theories of Heider (1958), Jones and Davis (1965), and Kelley (1967), the recipient of aid may attempt to determine if the benefactor was intentionally motivated to provide help, or if help was either accidentally provided or dictated by role requirements. Heider (1958) has observed, "We do not feel grateful to a person who helps us fortuitously, or because he was forced to do so, or because he was obliged to do so. Gratitude is determined by the will, the intention, of the benefactor" (p. 265). Thibaut and Riecken (1955) experimentally demonstrated that recipients will like a benefactor more if they perceive the benefactor to be internally motivated rather than forced into the helping role.

Other evidence indicates that recipients will also be more inclined to reciprocate if they have been intentionally helped rather than accidently or relunctantly helped. For example, in a study by Greenberg and Frisch (1972), subjects were given aid by another "subject," and were led to believe that they were either intentionally or accidentally helped. Recipients who thought the aid was intentional were more likely to reciprocate than were those who thought it was accidental. Similar results have been found in several other studies (see Garrett & Libby, 1973; Goldner, 1965; Goranson & Berkowitz, 1966; Greenberg, 1968; Gross & Latané, 1974; Leventhal, Weiss, & Long, 1969).

In reciprocal relations, it is important not only that helping behavior is intentional, but also that the help is given for the right reasons. When acquaintances offer to help "out of the goodness of their hearts," our reaction is an immediate one: We feel affection and gratitude; we resolve to return their kindness. If, on the other hand, acquaintances make it brutally clear that they expect a return with interest, we are far less touched by their generosity and may be less concerned about repaying the kindness. This was pointed out by Schopler (1970), who argued that if recipients of help believe that their benefactors were genuinely motivated, they will be appreciative and likely to reciprocate. If, however, recipients believe benefactors were selfishly motivated, they will be less appreciative and less likely to reciprocate. In an experimental illustration of this, Tesser, Gatewood, and Driver (1968) found that the donor's motives had a strong effect on feelings of gratitude expressed. Subjects were given various stories describing the motives a donor had for doing particular acts of helping. Subjects expressed more gratitude for the donor described as giving primarily to benefit the recipient than for the donor described as giving for other, more selfish reasons. Other data in support of this contention come from Brehm and Cole (1966); Broll, Gross, and Piliavin (1974); Krebs (1970); Leeds (1963); Lerner and Lichtman (1978); and Schopler and Thompson (1968).

How do recipients of aid know if donors have selfish or unselfish motives for helping? Schopler (1970) suggests that if the benefit satisfies a real need for the recipient or if the favor is appropriate within the context of that particular relationship, the aid will likely to be perceived as genuinely motivated.

Another indication that the donor is helping for unselfish reasons is if the cost of providing the benefit is high. The greater the cost the recipient appears to incur in rendering aid, the more likely the recipient is to perceive the donor to be altruistically motivated, and the more the recipient will desire to reciprocate. Gergen, Ellsworth, Maslach, and Seipel (1975), for example, found that subjects expressed more attraction to a donor who contributed in spite of having few resources than to a donor who contributed the same amount from a much larger pool of resources. Other studies finding similar results include Fisher and Nadler (1976), Gross and Somersan (1974), and Latané (1973).

Similarly, recipients' attributions as to the donor's generosity may be influenced by the amount of benefit the recipients receive. The more that recipients receive, the more likely they will be to conclude that the donor was altruistically motivated. Several studies have demonstrated a relationship between magnitude of benefit received and desire to reciprocate (Freeman, 1977; Greenberg & Frisch, 1972; Kahn & Tice, 1973; Pruitt, 1968; Stapleton, Nacci, & Tedeschi, 1973; Tesser *et al.*, 1968; Wilke & Lanzetta, 1970).

Why, in equity terms, should recipients have different reactions to givers whose gifts are voluntary and unselfishly given as opposed to givers whose gifts are involuntary or even ulteriorly motivated? First, recipients may feel that goodness and unselfishness, in and of themselves, are positive inputs to a relationship. Thus, they may feel that "good" benefactors deserve a bigger return than "bad" donors, who perform the same acts. Second, the recipients may be more eager to maintain a relationship with a generous person than with a selfish one. Thus, they may be especially willing to treat the others equitably by repaying their kindness.

Intimacy: Special Reciprocal Relationship

A very special type of reciprocal relationship is found between intimates. On almost a daily basis, intimates are involved in a mutual exchange of helping favors. Indeed, more helping (and helping of a more valuable nature) is probably received from intimates than from any other source. Thus, it is surprising that so little research has examined the giving and receiving of help in such relations.

How might helping in intimate relations differ from helping more casual relations? More specifically, how might recipients react if aid is received from an intimate versus a casual acquaintance? We will begin by reviewing the little research that has examined this issue. We will then suggest ways in which intimate relations may differ from casual relations, and the impact of these differences on recipients' reactions to helping behavior.

Clark and Mills (1979) argue that "exchange" (casual) relations are very different from "communal" (intimate) relations. In a communal relationship, members are concerned about one another's welfare; benefits are given in order to meet one another's needs. There is no expectation that the generous giver is entitled to anything in return. In exchange relations, on the other hand, benefits are given with the expectation that they will eventually be reciprocated.

Clark and Mills argue that in a developing social relationship accepting favors and *not* reciprocating is a signal that the individual is interested in forming a truly communal relationship. Accepting favors and immediately reciprocating, on the other hand, is a signal that the individual wants to keep the relationship a casual (exchange) one. This suggests that immediately reciprocating in response to aid received should be welcomed in an exchange relationship, but not in a communal relationship (see Clark, present volume).

Bar-Tal, Bar-Zohar, Greenberg, and Herman (1977) also examined how expectations and obligations for helping differ as a function of how intimate the relationship is. They predicted that the closer the relationship between two people, the more likely one partner would perceive the other as obligated to offer help, and the less the gratitude that would be expressed for the help. They based this prediction on Blau's (1964) contention that expectations and obligations for helping are more intense among family and friends than among acquaintances and strangers. The receiving and the giving of help are perceived as part of the role enactment of an intimate, but not of a casual acquaintance.

How would we, as equity theorists, expect exchange of resources and helping favors to differ in intimate versus nonintimate relationships? Are equity concerns as important in long-term intimate relationships as they are in short-term casual relationships? How might reciprocity differ in casual versus intimate relationships? Let us examine these issues.

1. Is an equitable exchange of resources and helping favors important in intimate relationships? We would argue that it is. In recent years, equity theorists have collected a considerable amount of survey evidence that demonstrates that in intimate relations, people care very deeply about whether or not they are fairly treated (for a review, see Hatfield *et al.,* In press). Researchers have interviewed dating couples (Hatfield, Traupmann, & Walster, 1979; Sprecher-Fisher, 1980; Traupmann *et al.,* In press), newlyweds (Hatfield *et al.,* 1979 and 1982; Utne, Hatfield, Traupmann, & Greenberger (Submitted) couples married an average length of time (Hatfield *et al.,* 1979); couples married for a much longer time (Schafer & Keith, 1980, 1981), and the elderly (Traupmann & Hatfield, 1981; Hatfield and Traupmann (In press); and Traupmann *et al.,* 1981).

The existing data support two contentions: (*a*) Men and women in equitable relationships are fairly content. Conversely, men and women who feel they've consistently received far more or far less than they deserve are relatively uncomfortable. The more inequitable their relationship, the more distressed they are. (See Figure 1 for a graphic illustration of these results).

At every age and at every stage in a relationship, couples who perceive their dating relationships and marriages to be relatively fair are more content than men and women who feel they are either underbenefited (being "ripped off") or overbenefited (having it "too good"). It is easy to see why men and women who feel they are being "ripped off' by their partners would be furious. They may well feel unloved ("If you really loved me, you would not treat me this way") as well as deprived of real benefits. But on first glance, many are surprised that those who feel they are getting far more than they deserve, are uneasy too. Interviews make it clear why those who have an embarrassment of riches, feel just that—embarrassed. On one hand, they are delighted to be receiving such benefits; on the other hand, they don't deserve them, and this makes them acutely uncomfortable.

(*b*) Equitable relationships are especially stable relationships. All of the preceding authors found that among dating couples, newlyweds, and the

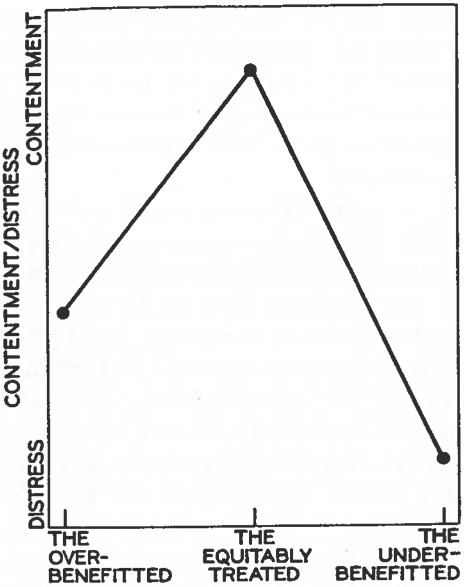

Figure 1. The relationship between equity and contentment.

elderly, equitable relationships were the most stable relationships. People seem to remain in those relationships in which the giving and receiving of helping favors are balanced.

2. How might reciprocity differ in casual versus intimate relationships? If the correlational evidence indicates that equity concerns are important in intimate relationships, why do experimental studies (such Clark & Mills, 1979) suggest just the opposite? We would argue that it is because the type of reciprocity examined in the laboratory is limited to short-term reciprocity that is of an exact form (if one receives aid in the form of chips, it is assumed that one reciprocates with chips rather than with a smile, a thanks, or an offer to meet later). In contrast, in correlational studies, it is assumed that reciprocity operates over a long period of time and comes in many varied forms.

Clark and Mills (1979) have demonstrated that if someone we care about does us a favor, we are hesitant to return exactly the same favor only moments later. We would agree. But the scenerio they describe (aid→nonreciprocation) is not the only possible one. A scenerio that is even more common is the following: Someone we are very interested in gives us a small gift (say flowers). We thank him or her. (This is the first act of reciprocation; not to do so signals ingratitude. We wait a discrete amount of time, searching for exactly the right present to give in return, something to signal we care. Perhaps we escalate a little by giving something of slightly greater value. The next step is then up to the other person. What we think people are signaling in this complex ballet is, "I care for you. We are friends. You can trust me to treat you fair and equitably."

We would argue that had Clark and Mills allowed their study to continue, and had they examined other forms of reciprocity, they would have found this delicate exchange operating in their communal groups. They would have found that intimates *do* reciprocate but over a longer period of time and not necessarily with the same type of aid they received. On the other hand, in groups in which people are not friends and wish to avoid becoming so, the researchers would probably find (as they actually did) that people reciprocate exactly and immediately. (As the old William Hamilton cartoon goes: "Bite for bite, and weekend for weekend, we're even. What do you say we call it quits?")

As suggested by the scenerios above, reciprocity may differ in intimate versus nonintimate relations in several different ways:

1. Type of aid reciprocated: Aid may take several different forms. We can offer others money, information, physical labor, companionship, and a wide variety of other resources. Foa and his associates (Donnenwerth & Foa, 1974; Foa, 1971; Foa & Foa, 1971, 1980) have listed six classes of resources: love, status, information, money, goods, and services. Among casuals, the form aid (and reciprocation of aid) may take is probably limited to money, goods, or services. In contrast, the form aid may take among intimates may span the gamut of resources. Although intimates often provide material benefits for each other, they also deal in the "softer" currencies of love, affection, and tenderness.

2. Immediacy versus nonimmediacy in reciprocating aid: In general, casual relationships are short-term. In contrast, intimate relationships tend to endure over a longer period of time. One of the consequences of being in a long-term relationship is that intimates will be more likely to tolerate inequities in the exchange of helping favors because they know they will have time to set things right. In contrast, casuals will feel that inequities should be set right immediately. Thus, aid received from a casual is likely to be reciprocated within a short period of time. Aid received from an intimate, on the other hand, need not be immediately reciprocated.

3. The impact of *we-ness* on helping: Intimates often come to think of themselves as a *we;* that is, they define themselves as a unit. Casuals, on the other hand, do not. Defining themselves as a *couple* may have a profound impact on the giving, the receiving, and the reciprocation of help among intimates. To the degree that the needs of both members of the

couple blend together, the separation between the helper and the recipient may be blurred; thus, the need to reciprocate is much less salient. Several other theorists have also discussed how defining themselves as a unit may affect exchange between individuals (Hatfield *et al.,* 1979; Hinde, 1979; Walster [Hatfield] *et al.,* 1978).

Unlike other theorists, then, we would argue that *both* casuals and intimates care about the equity of their relationships. However, because of various ways intimates can reciprocate, equity among intimates may be more complicated than among casuals. But in the end, everyone—intimate or nonintimate—cares about equity.

Let us now turn to the last kind of relationship we discussed: altruistic relationships.

Altruistic Relationships

Altruistic relationships can be diagrammed as follows:

$$\begin{array}{ccc} \text{(Philanthropist)} & & \text{(Recipient)} \\ \dfrac{(O_A - I_A)}{(|I_A|)^{K_A}} & < & \dfrac{(O_B - I_B)}{(|I_B|)^{K_B}} \end{array}$$

For most people, the true altruistic relationship is evidence of humankind at its best. In a true altruistic relationship, the individual is giving without expecting anything in return. Yet people's feelings about altruists and beneficiaries are mixed. Let us consider some examples.

1. Society tells people they should/should not behave altruistically. One of society's most perplexing problems is to decide how the needy should be treated. On the one hand, most people acknowldge that if one's fellows are so young, so disabled, so sick, or so old that they are unable to care for themselves, then society should care for them. We feel we *should* give to a plethora of deserving causes: the United Way, Save the Children Fund, Planned Parenthood, Committee for Voter Registration, etc (see Berkowitz, 1972a; Berkowitz & Daniels, 1963; Brickman, Rabinowitz, Coates, Cohn, Kidder, & Karvza, 1979; Gouldner, 1960; Lerner, 1971; Leventhal, Weiss & Buttrick, 1973; Pruitt, 1972).

On the other hand, people do not consider "need" to be an *entirely* legitimate input. They often complain that they cannot be obligated to help all who are in sad straits. At best, many beleagured givers feel that any help they do cede should be considered not a gift, but a loan. At the very least they feel entitled to the recipient's gratitide. Thus, societal norms provide competing pressures: They say people should behave altruistically toward those in "need"—but that they are entitled to some recognition and thanks for doing so.

Furthermore, there is also a controversy as to whether altruism even helps the recipient—which puts the potential altruist in even a more perplexing position. Some theorists have argued that helping is not good for the recipient *or* for society. Skinner (1978), for example, has argued that by helping we "postpone the acquisition of effective behavior and perpetuate the need for help" (p. 251). Weitman (1978) argues that help is not good for society because it has the potential to alienate those who are not being helped.

Perhaps the pessimism of these theorists is warranted. Reports indicate the high failure rates of such programs as compensatory education (Bentler & Woodward, 1978; Stebbins, St. Pierre, Proper, Anderson, & Cerva, 1978), prisoner rehabilitation (Yochelson & Samenow, 1976), and institutionalized living for such groups as the elderly, the mentally disabled, and foster care children (Glasser, 1978).

Because society's reactions to altruism are mixed, we might expect that altruists would have similarly mixed feelings.

2. Society rewards/punishes people for behaving altruistically. Generally, society encourages and rewards altruistic behavior. In fact, there are even laws to encourage altruists. The state of California, for example, has a Good Samaritan law that compensates citizens for any injuries received while attempting an altruistic deed (reported in Albrecht, Thomas, & Chadwich, 1980). In addition, society may reward altruists with love, praise, their names in the paper, medals, and/or flowery epitaphs. Altruists who have internalized society's norms may also reward themselves for their unselfish behavior (Rosenhan, 1978). Yet, there is often a thin line between being an "altruist" and being a "sap". Sometimes people respond to altruists with ridicule and disdain (Brown, 1968, 1970).

3. Psychologists themselves are ambivalent about whether or not altruism exists. A few scientists believe that people act unselfishly under special circumstances. Some theorists, for example, contend that an empathic arousal predisposes the individual to act altruistically (Aronfreed, 1968; 1970; Aronfreed & Paskal, 1965; Lenrow, 1965; Rosenhan, 1969, 1978). Empathy has been defined as "the self-concious awareness of the consciousness of the other" (Wispé, 1968). Through empathy, people can vicariously experience the other's disappointment over suffering unjust inequities. When individuals experience such an affective arousal to the plight of others, they may sacrifice their own interest for the others'. Much experimental evidence exists to suggest that people do respond empathically

to people in distress and often subsequently offer help (Clark & Word, 1972; Darley & Latané, 1968; Gaertner & Dovidio, 1977; Piliavin, Rodin & Piliavin, 1969; Staub, 1970; Stotland, 1969; Weiss, Boyer, Lombardo, & Stick, 1973).

On the other hand, many other scientists (including equity theorists) are fairly skeptical. They argue that if society wishes to teach children to be generous spirited, it cannot rely on some innate sociobiological impetus to altruism. Instead, society must reward potential altruists with love, praise, or material benefits for acting generously. Society must make it profitable to be good.

Equity theorists interpret apparent altruism in cost–benefit terms; that is, by assuming that individuals learn to perform those acts that are rewarded and to avoid those acts that are not. Reward is whatever people value, and it may include approval from others or from the self. Blau (1968), for example, observes that people may help for social approval: "To be sure, there are men who selfishly work for others without thought of reward, and even without expecting gratitude, but these are virtually saints, and saints are rare. Other men also act unselfishly sometimes, but they require more direct incentive for doing so if it is only . . . social approval" (p. 453). Homans (1961, 1976) argues that if certain people value an image of themselves as altruistic and self-sacrificing, then performing sacrificial behavior will be rewarding to them. Thus, these theorists would argue that the rescuers described above were profiting—in their own idiosyncratic ways—from acting in such seemingly "altruistic" ways.

According to some theorists, even empathy (which was described above as a precursor to altruistic behavior) contains elements of egoism. When experiencing empathic arousal, people may help the one in need primarily to alleviate an aversive state (Gaertner & Dovidio, 1977); Piliavin *et al.*, 1969; Piliavin, Dovidio, Gaertner, & Clark, 1981).

In view of the conflicting pressures on the altruist, it is not surprising that people who voluntarily contribute more than their share to a relationship often feel both pride and distress. And it is no wonder that altruists are often tempted to reduce that distress by restoring actual or psychological equity.

RECIPIENT AMBIVALENCE

If good Samaritans have mixed feelings, their recipients have even more reason to be ambivalent. On the one hand, recipients know that the altruists are showering them with more love and material benefits than they are entitled to and, thus, they cannot help feeling grateful. On the other hand, the recipients cannot help feeling uneasy about their undeserved benefits. There are three reasons for this: The helper–recipient relationship is (1) inequitable; (2) potentially exploitative, and (3) potentially humiliating.[4]

The Recipient Is in an Inequitable Relationship

When benefactors bestow benefits on recipients, they place them in an inequitable relationship. As indicated in Proposition 3, inequitable relationships are unpleasant relationships.

As we saw in the previous section, inequity is disturbing for everyone (see Figure 1 for a graphic illustration of this prediction). Researchers have found that it is more pleasant to be in a reciprocal relationship than in an unbalanced one, regardless of whether one is the benefactor or the beneficiary of largesse.

The distress of being the beneficiary of undeserved reward is also explicated by Greenberg in his theory of indebtedness. According to Greenberg (1968, 1980), indebtedness is an unpleasant motivational state that leads to an obligation to repay the other. Indebtedness is similar to advantageous inequity; the individual feels overbenefited and feels obligated to give something back in return to the other. According to the indebtedness theory, the individual who is "in a state of obligation" will reduce the indebtedness by increasing the donor's outcomes or by reducing the donor's inputs. In contrast to the indebtedness theory, equity theory allows for more options for restoring balance to the relationship—including altering *own* inputs and outcomes (either actually or psychologically). For a more thorough discussion of indebtedness theory, see the chapter by Greenberg in this volume.

The Recipient Is in a Potentially Exploitative Relationship

When philanthropists provide benefits that their recipients cannot repay, the recipients may well feel that they have become obligated to reciprocate in unspecified ways for an indefinite period. As Blau (1968) put it, "giving is, indeed, more blessed than receiving, for having social credits is preferable to being socially indebted" (p. 453). Recipients might reasonably fear that their benefactors may attempt to extract a greater repayment than the recipients would have been willing to give had they been warned of the conditions of the exchange ahead of time. Throughout time and geography, observers have noted that persons often demand repayment at usurious interest.

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[4] In any type of helping relationship—exploitative, reciprocal or altruistic—these issues may arise, they are probably most salient in altruistic relationships.

Dillon (1968) proved a compelling example of how the exploitational gift syndrome works. He describes a French industrialist's (Mr. B's) warm relationship with an Arab worker as follows:

> In June, 1956, an Arab worker at B's factory asked the *patron* for permission to leave work for two days to attend to problems of burying a brother, Ahmed. . . . B. responded by offering to pay for the burial, by arranging to have an Arabic-speaking French officer *des affaires indigenes* (an ex-colonial officer) notify the kinsmen in Algeria, and by hiring an *imam* (Moslem prayer leader) to conduct the services. On July 16, 1956, the end of Bastille Day demonstrations by Algerians at the Place de la Republique, B. summoned Kazan and asked: "If your comrades tell you to go on strike during the vacation, when you are alone guarding the factory, what will you do Kazam?" The *patron* told him that he was aware he would run the risk of being knifed (*coup de couteau*) by other Algerian members of an Islamic fraternal organization who were organizing sympathy strikes to protest French resistance against Algerian rebellion. . . . The *patron,* in describing this understanding with Kazan, his oldest Algerian worker said:
> 'We depend on each other. He has worked for me almost 12 years. Without him I could not count on the work of the other Algerians. He is top man and, being the oldest, I depend on him to control the others. . . . Kzam knows that he can depend on me when he is in trouble.' (pp. 60–61)

When the industrialist offered his favors, he did not state that the price was to risk one's life. Had the Arab known, he may well have concluded that the exchange was not a profitable one. This is the essence of an exploitative relationship.

In addition to the potential cost of having to return the benefit with a high interest, recipients may feel their freedom is limited in such potentially exploitative relationships. This may lead to psychological reactance and negative feelings for the donor (Brehm, 1966; Brehm & Cole, 1966).

Exploitative Relationships Are Potentially Humiliating Relationships

Recipients may be hesitant to accept help for still another reason: They may fear that the gift will establish the benefactor's moral and social superiority. They may be unwilling to accept such menial status. Observational evidence suggests that recipients' fears are probably well founded. Social observers have noted that gift-giving and humiliation are linked. In her analysis of beneficence among East European Jews, Joffe (1953) notes

> For a society within the Western cultural tradition, East European Jewish culture exhibits a minimum of reciprocal behavior. Wealth, learning and other tangible and intangible possessions are fluid and are channeled so that in the main they flow from the 'strong,' or 'rich,' or 'learned,' or 'older,' to those who are 'weaker,'

> 'poorer,' 'ignorant' or 'younger.' Therefore, all giving is downward during one's lifetime. . . . The concept of the good deed, the Mitzvah, is not voluntary—it has been enjoined upon every Jew by God. . . . It is shameful. . . . to receive succor of any sort from those who are inferior to you in status. To receive any (return gifts) implies that you are in a position to be controlled, for the reciprocal of the downward giving is deference. (pp. 386–387)

Homans (1961) noted that "anyone who accepts from another a service he cannot repay in kind incurs inferiority as a cost of receiving the service. The esteem he gives the other he foregoes himself" (p. 320).

That the individual does forego his self-esteem in accepting help has been documented. For example, it has been observed that welfare has a detrimental effect on the recipient's self-esteem (Haggstrom, 1964). It has also been noted that elderly people who receive help have trouble maintaining their self-esteem (Kalish, 1967; Lipman & Sterne, 1962). Experimentally, it has been shown that there is a detrimental effect on one's self-esteem when help is received and there is little opportunity to reciprocate (Fisher & Nadler, 1974).

These three factors, then, mean that most recipients of help will have serious reservations about having been so blessed. This analysis sheds new light on the perplexing finding that recipients sometimes come to resent their dependence and/or to despise themselves and their benefactors.

REACTIONS OF RECIPIENTS IN RECIPROCAL VERSUS ALTRUISTIC RELATIONSHIPS

In the previous section we described three types of helping relationships and focused more specifically on two types—reciprocal and altruistic. From our comparison of these contrasting types of relationships, it is clear that a single factor seems to have a critical impact on the reactions of recipients; namely, the beneficiary's ability to make restitution.

Researchers who have investigated the interactions of Christmas gift givers, members of the *kula* ring, the kindness of neighbors, and the behavior of intimate lovers, have dealt with donors and recipients who knew that eventually their helpful acts would be reciprocated in kind. Researchers who have investigated the interactions in such dyadic relations as welfare workers and their clients, developed and underdeveloped nations, and the medical staff and the physically handicapped have dealt with recipients who know they will never be able to repay their benefactors. The differing reactions of participants in reciprocal and nonreciprocal relations underscore the importance of the recipient's "ability to repay" in determining how help affects the relationship. Ability to repay seems to determine whether the doing of favors generates pleasant social interactions or resentment and suffering. Research supports the following conclusion: Undeserved gifts produce inequity in a relationship. If the participants know the recipient can and will reciprocate, the inequity is viewed as temporary, and thus it produces little distress. If the participants know the recipient cannot or will not reciprocate, however, a real inequity is produced; the participants will experience distress (Proposition 4).

Ethnographic data demonstrate the importance of the ability to reciprocate in the gift-giving process. Mauss (1954), for example, concluded that three types of obligations are widely distributed in human societies in both time and space: (1) the obligation to give; (2) the obligation to receive; and (3) the obligation to repay. Mauss (1954) and Dillon (1968) agree that, whereas reciprocal exchanges breed cooperation and good feelings, gifts that cannot be reciprocated breed discomfort, distress, and dislike. In support of their contention, the authors surveyed a number of societies that have an exchange system in which everyone is a donor *and* a receiver (the *kula* ring is an example of such an exchange system). Harmonious stable relations are said to be the result of exchange systems of this kind. The authors contrast these societies with those in which no mechanism for discharging obligations is provided. For example, Dillon (1968) notes, "Instead of the Kula principle operating in the Marshall Plan, the aid effort unwittingly took on some of the characteristics of the potlatch ceremony of the 19th Century among North Pacific Coast Indians in which property was destroyed in rivalry, and the poor humiliated" (p. 15). Volatile and unpleasant relations are said to be the result of such continuing inequities (see also Blau, 1955; Smith, 1892).

We present experimental evidence to support the following three contentions concerning the effects of the ability to repay on recipients' reactions to aid: (1) Benefactors are liked more (and derogated less) when their beneficiaries can reciprocate than when they cannot; (2) people prefer gifts that can be repayed over those that cannot; (3) if the recipient cannot directly repay the donor, the ability to benefit a third person may serve to reduce this tension. We examine each contention in turn.

1. Benefactors are liked more (and derogated less) when their beneficiaries can reciprocate than when they cannot. In one study, Gergen (1969) investigated American, Swedish, and Japanese citizens' reactions to reciprocal and nonreciprocal exchanges. The experiment was arranged so that subjects were losing badly in a game. Then, at a critical stage, they received help in the form of needed chips from one of the "luckier" players. For one-third of the subjects, the donor explained that there was no need to return any chips; for another one-third of the subjects, the donor requested

that an equal number of chips be returned later; for the rest of the subjects, the donor asked for the chips to be returned *with* interest. Those partners who provided benefit without obligation or who asked for excessive benefits were liked less than those who proposed that the students make exact restitution later in the game. Similar results were also found by Gergen *et al.* (1975).

In another study by Gergen and his associates (Gergen, Diebold, & Seipel, 1973), subjects received a present of chips at a critical point in the game from another player who requested that an equal number be paid back later. However, in subsequent play, only half of the subjects managed to retain their chips, so that half were unable to return the gift. In evaluations of the donor, recipients who were unable to repay the donor evaluated him less positively than did recipients who were able to repay.

Several other studies have also shown that benefactors are liked more when they can be repayed. In a study by Gross & Latané (1974), it was found that the donor was liked more when the subjects were given an opportunity to return help than when they were not. Castro (1974) also found that the recipient of a benefit will like the donor more if there is an opportunity to repay than if there is no opportunity to make restitution. Schumaker and Jackson (1979) found that if recipients are prevented from directly helping the donor, they end up derogating the donor.

2. People prefer gifts that can be repayed over those that cannot. Gergen and Gergen (1971) questioned citizens in countries that had received U.S. aid as to how they felt about the assistance their country had received. They found that international gifts accompanied by clearly stated obligations are preferred to gifts that are not accompanied by obligations or are accompanied by excessive "strings."

There is also evidence that individuals are more willing to seek and accept gifts that can be reciprocated than gifts that cannot. In one study by Greenberg (1968), subjects were given a temporary handicap (an arm was placed in a sling). This restriction made it almost impossible for the subjects to perform the task they were assigned. The incapacitated student knew, however, that he could solicit help from a fellow worker. Half of the students believed that the fellow worker would need their help on a second task and that they would be able to provide assistance. Half of the students believed that the fellow worker would not need their help in the future and that, in any case, they would not be able to provide much help. The student's expectations about whether or not they could reciprocate any help strongly affected their willingness to request help. Students in the nonreciprocity condition waited significantly longer before requesting help than did those in reciprocity conditions. Greenberg and Shapiro (1971) replicated these findings.

Morris and Rosen (1973), however, questioned whether the procedure used in these studies confounded the lack of opportunity to reciprocate with feelings of inadequacy over a poor performance. They designed an experiment in which the inability to reciprocate was clearly outside of the control of the subject. Subjects were told either they had done well or poorly on the task. In addition, subjects were told either that there would be plenty of time for several tasks to be conducted or that the experiment would have to end immediately after the first task (due to electricity failure). It was found that persons who were led to believe they had performed well were more likely to seek help from another subject than persons who were led to believe they had performed poorly. However, the ability to reciprocate also had an effect: Subjects were reluctant to seek help if they would not be able to reciprocate (for example, if they knew the experiment would end after the first task). Other evidence indicating that people are more willing to seek help if it can be reciprocated comes from Clark, Gotay, & Mills (1974), and DePaulo (1978).

Evidence also exists to indicate that people are less willing to request future aid or gifts if they are unable to reciprocate aid already received (see Castro, 1974).

3. If the recipient cannot directly repay the donor, the ability to benefit a third party may serve to reduce tension. In one study, Goranson and Berkowitz (1966) found that recipients offered to help a third party if prevented from helping the donor. They found, however, that the amount of help given to a third party was significantly less than the amount of help given directly to the donor. Similar results were also found by Kahn and Tice (1973), and Schumaker and Jackson (1979).

Other related evidence suggests that, in the absence of the ability to repay the donor, being able to give to a third party helps prevent possible negative feelings for the original donor. It appears that just the act of donating, even if it is not to the same party who provided the help, serves to reduce the inequity. Castro (1974) found that, in the absence of an ability to reciprocate the donor directly, the recipient will like the donor more and be more willing to request aid in the future if given an opportunity to aid a third party (see also Gross & Latané, 1974; Schumaker & Jackson, 1979).

Some third parties may be more effective substitutes for the original donor than others. For example, evidence exists to suggest that the more similar the third party is to the original donor, the more likely the third party will be to receive help (Greenglass, 1969). In addition, if the third party is perceived to be in a close relationship with the original donor, he or she will be more likely to receive help. In a study by Greenberg Mowrey, Steinberg, & Bar-Tal (1974), subjects were asked the following two questions: (a) "If you were indebted to someone, how indebted would you still feel if you then helped someone with whom the help-giver was not acquainted?" and (b) "If you were indebted to someone, how indebted would you still feel if you helped someone close to the help-giver such as a member of his/her family?" It was found that subjects reported that they would feel less indebted after helping a family member.

In sum, it appears that the critical factor for determining whether or not aid has positive effects for the recipient's well-being and for the recipient's relationship with the benefactor is the ability of the recipient to make restitution.

SUMMARY

In this chapter we explored three types of helping relationships. Although all three relationships are commonly labeled *helper–recipient* relationships, the dynamics of the three are quite different.

In exploitative or excessively profitable relationships, the ostensible donors help others merely because it is the most profitable way to help themselves. In such relationships, the recipients will likely feel resentment over being treated inequitably. In reciprocal relationships, participants alternate between being the donor and being the recipient. Such exchanges seem to build good feelings between the recipient and the helper, probably due to the desire and capacity to repay. Finally, the public's epitome of a good relationship—the altruistic relationship—was considered. In a true altruistic relationship, helpers are offering more help than they expect in return. We reviewed factors that determine whether such relationships breed good feelings or, as they more frequently do, breed hostility, humiliation, and alienation.

Although in this chapter we have concentrated on the recipient's reactions to aid, an interesting and unexplored area of inquiry for future research is to examine the reciprocal and dynamic relation between the recipient and the benefactor, as affected by equity concerns. How do recipients' reactions to aid affect the benefactor and the benefactor's willingness to provide further help? How do benefactors perceive recipients will react to their aid, and how does this perception affect the offer of aid?

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