1980

Social resources of the elderly as correlates of life satisfaction

Silvana Rigo Hale
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<https://doi.org/10.15760/etd.3176>

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AN ABSTRACT OF THE THESIS OF Silvana Rigo Hale for the Master of Arts
in Sociology presented February 11, 1980.

Title: Social Resources of the Elderly as Correlates of Life
Satisfaction.

APPROVED BY MEMBERS OF THE THESIS COMMITTEE:

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Life satisfaction of the aged has become increasingly prominent as a subject of investigation in the field of social gerontology. Research has produced considerable agreement regarding the factors believed to influence life satisfaction of the elderly. Less agreement, however, exists when the relative importance that each individual factor has on life satisfaction is evaluated; and agreement is totally lacking when the theoretical perspective in the field is considered.

This project has addressed the need for a new and effective theoretical framework in the field of social gerontology by proposing and applying exchange theory as a valid approach to the study of aging.

This study specifically analyzed the relationships between life satisfaction and social resources, social contexts and change in order to measure and clarify the significance of the individual factors.

Life satisfaction was measured by Life Satisfaction Index A (LSIA) developed by Neugarten et al., in 1961. Data were collected from two subsamples of 20 respondents each, consisting of personnel who had retired in the years 1973 and 1978 from a large corporation.

Analysis of data indicated that life satisfaction of the respondents was positively correlated with financial resources, prestige, power, social contexts, recognition and approval, health, and overall positive changes. No relationships were found to exist between life satisfaction and formal and informal social supports, housing resources, transportation resources and social obligations.

With regard to exchange theory, the significant direct correlations between costs and rewards in formal associations, prestige, recognition and social obligations confirmed the principle of fair exchange as valid within the context of this study. Data also provided evidence to support the economic principle that costs constitute unfavorable transactions and rewards constitute favorable transactions.

In addition to verifying its effectiveness as a tool for research in the field of aging, data analysis also established exchange theory to be a more valid approach to the study of life satisfaction of the elderly than the alternative theories of activity and disengagement. This thesis concluded discussing the need to improve indicators of life satisfaction and to extend the application of exchange theory in the field of social gerontology.

SOCIAL RESOURCES OF THE ELDERLY AS
CORRELATES OF LIFE SATISFACTION

by

SILVANA RIGO HALE

A thesis submitted in partial fulfillment of the
requirements for the degree of

MASTER OF ARTS
in
SOCIOLOGY

Portland State University

1980

TO THE OFFICE OF GRADUATE STUDIES AND RESEARCH:

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ACKNOWLEDGEMENTS

I would like to express my gratitude to all the people who helped me in this learning experience. I wish to gratefully acknowledge the contributions of time and expertise from: Dr. Jan Hajda, whose early interest in my ideas was instrumental to the conceptualization of this project; Dr. Leonard Cain, whose suggestions were supportive and served well to clarify my arguments and to stimulate new ideas; Dr. Michael DeShane, whose comments were comprehensive and invariably provocative; and Dr. Barbara Stewart, a responsive and extraordinary teacher to whom I owe my literacy in statistics.

I am grateful to Ellen Jean who assisted with computer programming, to Mary Boucher who typed this manuscript, and to the forty persons who generously gave their time to be interviewed.

I would also like to thank posthumously my father for shaping my commitment to intellectual endeavor and for exemplifying to me the virtue of perseverance. I especially wish to thank my mother and sister for their encouragements and understanding. My greatest thanks, however, go to my husband, for his continuous support, his generosity, and his endurance during this venture of mine.

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CHAPTER 1

INTRODUCTION

The purpose of this research is to investigate the relationships between life satisfaction of the elderly and their social resources and social context. Successful adaptation (variously measured as morale, happiness and life satisfaction) of the aged is perhaps the oldest and most investigated subject in social gerontology. The recent rapid increase in the proportion of older persons in industrialized, urban societies has been viewed with concern, and aging in social contexts has been perceived as problematic on both theoretical and evidential grounds. The values of modern societies appear to favor youth, to restrict access of social goods to many aged individuals, and to create ambiguity in defining the social roles in later life. In spite of such obstacles there is a consensus among researchers that successful adaptation in late life is the rule, rather than the exception (Maddox and Wiley, 1976).

There is a general agreement that the key factors which influence adaptation include health, income, and status---otherwise known as "massive situational factors" (Streib and Schneider, 1971). There is less agreement regarding the relative importance of these and related factors in promoting life satisfaction, and there is no agreement at all regarding theoretical explanations for life satisfaction.

For years, activity and disengagement theories have been used as alternative and contradictory explanations of life satisfaction in late

life. What has been learned from longitudinal studies on the subject has been that both perspectives are partially correct and that successful adaptation involves complex transactions between individuals and the physical and sociocultural environments with which they interact. A theoretical perspective focusing on the dynamic, transactional, and circumstantial aspects of behavior, such as exchange theory, has been recently suggested as the approximate tool to investigate adaptation in late life (Dowd, 1975; Maddox and Wiley, 1976; Sussman, 1976).

This study will use exchange theory to investigate life satisfaction of the elderly, since the theory provides a flexible framework for the analysis of social interaction, social resources and social contexts. Furthermore, this research will endeavor to avoid the typical bias toward financially deprived aged individuals by focusing analytical attention on a sample population with a more heterogeneous socioeconomic background. It is hoped that this approach will contribute a useful way of organizing thoughts and data and a better understanding of the phenomenon of aging.

CHAPTER II

REVIEW OF LITERATURE

Social Perspective

Old age is burdensome. This fact has been acknowledged and eloquently discussed as far back as two millennia ago. Marcus Tullius Cicero in his Essay on Old Age (1858) stated that old age "to most old men is so disagreeable, that they say they support a burden heavier than Aetna....All men wish to attain [it], and yet they complain when they have attained it; so great is the inconsistency and waywardness of folly."

Cicero attributed the unhappiness of old age to four major factors: role loss; health impairment; inability to enjoy sensual gratification; and proximity to death. He also proposed the remedies to prevail upon such disadvantages: patience; dignity; and wisdom. The problems and paradoxes of old age continued to be perceived through centuries as personal problems. Only recently did aging begin to be recognized and studied as a social problem. As such, it has undergone scientific investigation and it has been affected by five common perspectives present in most early and contemporary studies of social problems, namely: "social pathology;" "social disorganization;" "value conflict;" "deviance;" and "labeling" (Weinberg and Rubington, 1973).

The "social pathology" perspective, with its strong biological connections, explains social problems in terms of "faulty individuals"

who need to be reeducated and/or changed in order to achieve a healthy condition for society. The "social disorganization" perspective examines social problems in terms of social organizations and individual behavior: behavior remains predictable as long as rules remain constant; however, in times of rapid social or technological change, a situation of "normlessness" occurs, behavior becomes unpredictable and uncoordinated, and social problems arise; solution of the problem consists of allocating resources to establish a clear, effective system of rules which will coordinate action and produce results (i.e., desired behavior).

The remaining three perspectives presented by Weinberg and Rubington do not blame society or individuals for social problems; they instead focus attention on the complex set of relations between individuals and society and expect that a rational analysis will indicate an adequate solution. The "value conflict" perspective "deals with different groups' interpretations of what society is and should be" (Weinberg and Rubington, 1973). The confrontation of different groups regarding conflicting interpretations creates the conditions for the emergence of social problems. The main assumption of "value conflict" is that in society conflict is the rule rather than the exception, but as long as a socially sanctioned system of agreements exists, order prevails. Order, in most cases, represents a settlement favoring the interests of the dominant groups in society; however, when different values and interests cannot be handled according to the rules of compromise, conflict will result. Solution in this case will come from the group with the most effective combination for the new settlement.

The "deviance" perspective is closely related to "value conflict" and it follows Durkheim's premise that deviance is a common phenomenon to be expected in all societies. "Deviance is always defined from the point of view of a particular normative structure, and in complex societies where there are a multiplicity of groups and conflicting normative standards, each member of the society is at some time liable to be considered deviant by one standard or another" (Theodorson and Theodorson, 1970). Deviance is not characteristic of a specific behavior or attitude, but is rather a phenomenon of human interaction in a specific normative setting. Solution to the problem, therefore, can only come when the simplistic distinction between deviant and conventional behavior is relinquished in favor of a more appropriate understanding and empathy of human diversity (Maddox and Wiley, 1976).

The "labeling" perspective shares with "deviance" the notion of human diversity in a specific normative setting. "Labeling," however, suggests that social reality is usually determined and decided by individuals with the power to do so; their definitions and their determination to enforce such definitions are at least as crucial as the behavior of the individuals in question. From this view, the social problem is solved only through reconceptualization and de-labeling.

The perspectives described above have influenced the nature and interpretation of research in the field of gerontology. The "social pathology" perspective has affected early studies on aging and still occupies an important aspect in medical research (e.g., Conference on Extension of Human Life Span, 1970). This view stresses the elimination of disease as the most important task in alleviating aging problems (Maddox and Wiley, 1976). The "social disorganization"

perspective emphasizes the problems of society in dealing with the elderly and promotes redistribution of economic and social resources to accommodate the aged person. The "value conflict" perspective sees the problems of older people as a result of the dominant middle-aged life styles and norms used to judge the behavior of the old.

"Deviancy" has for a long time presented the old person as a deviant, one who should be disapproved of, corrected, and/or isolated. More recently, aging has been characterized as a non-pathological and "different" aspect of humanity to be understood and appreciated. Finally, "labeling perspective" has pointed out that prevailing expectations about behavior in late life tend to be negative and restricting, "so much so, in fact, that older persons tend to avoid applying the label old to themselves whenever possible, but tend to be so labeled anyway by others" (Maddox and Wiley, 1976).

Notwithstanding the contribution of these perspectives to the field of social gerontology, two additional conflicting approaches, referred to as activity and disengagement theories, have produced the greatest amount of research and the most notable debate on the subject. However, neither theory has been able to produce an explanation for the multiple and dynamic aspects of aging, nor has created consensus regarding the aging process. The purpose of the next section is to present the documented bases for both theories and to present evidence of an alternative framework which will effectively explain life satisfaction of the elderly.

Current Theories of Aging

Disengagement theory, as it was first developed by Cumming and

Henry (1961), is based on the definition of aging as a time in which "relationships between a person and other members of society are severed, and those remaining are altered in quality." The process of severing relationships (i.e., disengagement) once started, becomes self-perpetuating. Since all social interaction is based on norms, and elderly people have few normatively governed relationships because of death and difficulty in replacing friends and acquaintances, the normative control weakens further, and they are less and less able to relate to strangers or even their own kin.

The style of disengagement is different for men and women since "the role of men in America is instrumental and the one of women is socio-emotional" (Cumming and Henry, 1961). In the former case, there is the relinquishing of all of one activity; in the latter there is the relinquishing of the burden of activity while maintaining a style of interacting that remains proper until the very end of life. Cumming and Henry point out that disengagement is a dialectical process carried out simultaneously by society and the individual and not necessarily harmoniously. Very often one of the two is not ready to disengage, and in such cases the results are either low morale for the person who is not ready to disengage, or an effort by society to re-engage the person who withdraws prematurely. In case of mutual disengagement, there is also a "shift in the quality of relationships in the remaining roles...a wider choice of relational rewards, and a shift from vertical solidarity to horizontal one" (Cumming and Henry, 1961). The authors view individual engagement with the social environment as a growing process beginning at birth, reaching culmination at maturity, and decreasing steadily and inevitably to the complete disengagement or

withdrawal of death. The process of withdrawal is mutually advantageous; society wants to disengage its older members in order to avoid the disruption that would occur if they died while fully engaged in different roles. Older people also benefit from it if, realizing their position, they accommodate to the process and relinquish their roles (Manney, 1975). Old age is not seen as a continuation of middle age, but rather as a developmental stage, with specific norms and specific appropriate behavior. Aging is a process by which a middle-aged society-centered individual changes into a self-centered one, attempting to rediscover who one was and where one has been, and to reintegrate oneself with the past (Manney, 1975).

Although very much criticized, the theory has its merits. Even though disengagement is by no means an unavoidable process, it seems to provide a careful and precise description of what happens to many people as they grow older. Our contemporary society appears to have little or no use for the elderly; and, it is considered true by many that it is progressively more difficult for older people to maintain their social and psychological engagement with others (Manney, 1975). Cumming and Henry deserve credit for introducing into the field and highlighting the importance of the concept of role-loss and the awareness and response of the elderly to it. Talcott Parsons agrees that they deserve recognition since, with their work, they "have provided an admirable setting for further research into this [aging] problem" (Cumming and Henry, 1961). However, one should be cautious with praise since disengagement has been the target of much criticism. No less than the co-author of the book Growing Old, Dr. Cumming herself, in a 1975 article, "Engagement with an Old Theory,"

published in the International Journal of Aging and Human Development, has expressed the view that the theory does contain some weaknesses: "I have not kept up with the field...but were I to work in this field, I would attack first proposition one and two...the empirical base of the theory has never been strong...I would want to press forward... questions about 'voluntary withdrawal...'" (Cumming, 1975). Other criticisms have preceded and followed Dr. Cumming's remarks: disengagement theory has been attacked on its premises, its postulates, its conclusions, the values it seems to suggest and the methodology and data gathering process.

The notion that age by itself leads to disengagement has many dissenters. Tallmer and Kutner (1969) suggest as the main cause of disengagement the impact of physical and social stress. Other studies provide evidence that while many older people lose their most important role (i.e., occupational for men and child-rearing for women), such losses do not result in disengagement from other social relationships.

Kapnick, Goodman and Cornwell (1968), in a study of delegates to the New York and Rhode Island constitutional conventions, found that "older delegates occupied their full quota of leadership roles" and were in no way "underrepresented, less active, or more conservative than younger men."

Political participation in this country has been higher for the population over 60 than for any other age group; in fact it seems to correlate with age. Glenn and Grimes (1968) have questioned and challenged the notion of disengagement from family life. Youmans (1967) has compared women aged 60 to 64 with those of 75+ and has found no evidence of difference in "the frequency of visits with siblings who

lived apart, in the proportion who said their children came to them for advice, or...who helped them in some way. While men experienced substantial disengagement from paid employment, they evidenced no disengagement from family-life or leisure-time activities." In a study of 2500 non-institutionalized elderly, Shanas (1968) found that, although increased preoccupation exists among the aged, there was no evidence of a "decrease in response to normative controls" as stated by disengagement theory.

Criticism of methodology of the work is less abundant than one would expect, considering the authors' evaluation of their own research. They acknowledged the tendency among their respondents to give stereotyped answers to questions dealing with normative behavior, such as religion, political participation, and food intake. They accepted the fact that relationships among variables produced scores that, although not "dissonant with disengagement theory...[were] not totally independent...and being developed from overlapping data...their relationship is inflated to an unknown degree" (Cumming and Henry, 1961). The basic objection to the style of the investigation, however, is contained in a statement by J. Gordon (1975): "The theory was formulated after data was [sic] collected by a method that turned attention away from the 'subjective' meanings of the respondents." The methods used and the kind of questions asked had a very marked impact on the kind of information gathered. She also observed that the life-space concept provides the reader with only quantitative data regarding the number and categories of role partners of individuals, but fails to produce any observation regarding the qualitative aspects of the interaction.

Finally, the most controversial aspect of disengagement theory has been generated by the authors' statement that "based on their findings...a general improvement of morale [occurs] as disengagement increases," which supports the impression that disengagement is a mutual freeing process by which intergenerational tension is avoided (Cumming and Henry, 1961). Although Cumming takes the position on this matter that "disengagement theory, after all, is only a theory, not a policy statement or a political platform" (Cumming, 1975), still the fact remains that administrators of facilities for the elderly have used the theory to support laissez-faire policies and negligent practices, and to remove resources and efforts from active interaction with the elderly (Cath, 1975).

The question often asked at this point is: is it possible or even desirable for social researchers to be concerned with the possible "applications" of their work?

The point has been raised by many with regard to disengagement theory and there seems to be among social gerontologists a general feeling of discomfort regarding the application of the theory. Stanley Cath expresses such feelings eloquently in his 1975 article, "The Orchestration of Disengagement:" "it rests heavily upon researchers to be as careful as possible in overseeing to what use tentative inquiries and early impressions are put, especially on a large or global scale, by human engineers with limited background and differing motivation" (Cath, 1975).

Zena Blau provides another example of dissatisfaction with disengagement theory:

The disengagement theory, as originally formulated by Cumming and Henry, has little, if any scientific value. Indeed, the modifications and qualifications that they have since made in their theory indicate that they, too, have come to see its shortcomings. Unfortunately, when theories, even discredited ones, once enter the public domain they often have unintended but nevertheless harmful effects on human behavior and human policy. The disengagement theory deserves to be publicly attacked, because it can so easily be used as a rationale by the non-old, who constitute the "normals" in society, to avoid confronting and dealing with the issue of old people's marginality and rolesness [sic] in American society (Blau, 1973).

Other comments on disengagement focus on the limitation of the theory from a sociology of knowledge perspective (Gordon, 1975), on the concern over the psychobiological universality of aging with resultant failure in explaining the variability in normal aging (Spence, 1975), and on the problems created by stereotyping both sexes and therefore turning attention away from the complex meanings of both work and marriage (Gordon, 1975).

The alternate explanation of social aging, "activity theory," has never been definitely named as such; the label has been applied to a sizeable body of literature regarding morale and old age.

Activity theory does not deny the postulate of disengagement theory that old age is characterized by role loss and decreased interaction; at the same time it does not agree with the view that the decreased interaction is voluntary and preceded by psychological disengagement of the individual. It suggests, instead, that societal structures are the agents which impose physical and economic limitations on the individual and cause his/her fast decline (Dowd, 1975). To prevent such decline, the individual should remain active, substitute new friends when old ones die and new interests and pursuits when his/her strength fails and does not allow him/her to continue

with the old ones.

Evidence to support such a view is mixed. Numerous studies do support the view that a better outlook on life is associated with a high level of activity. Marshall Graney (1975), after analyzing longitudinal data on 60 elderly women, found happiness and social activity to be directly related. The author recognized, however, that of the kinds of social activities under consideration some were more significant than others when related to happiness, and that differences in age presented important differences in the level of happiness. Morton Beiser (1974), in a study of 12 rural communities in Canada dealing with components of emotional well-being, reported that long-term life satisfaction "depends on the availability of, as well as the ability to respond to, emotional ties and the satisfactions that emanate from long-term family and community relationships."

Edman Palmore and Clark Luikart (1972), in analyzing the data from the celebrated Duke Adaptation Study, found that after self-rated health, activity was the most important variable related to life satisfaction: "the most important activity determinant of life satisfaction is organizational involvement, and that other forms of activity are of secondary importance at best." John N. Edwards and David L. Klemmack (1973), in a similar approach tested the relationships between 22 variables and life satisfaction and observed that after socioeconomic status and perceived health status, informal participation with nonkinsmen was the best predictor of life satisfaction. Informal participation with kin had no significant correlation; high satisfaction was associated only with high frequency of visiting neighbors, phoning others and "belonging to and intensity of

involvement in voluntary and church-related associations."

Conflicting evidence from Morris L. Medley (1976) indicated family life to be the most important correlate with and to make the greatest single impact on life satisfaction. Susan Sherman (1974), after comparing the morale of people from different types of housing, noted a positive relationship between activity scores and several measures of outlook on life. The relationship was not, however, as high as expected and several observations by the author underline significant problems of activity theory. Sherman expressed the belief that a raw score of activities tends to reflect the quantitative more than the qualitative aspects of activities and does not take into consideration levels of activity of individuals prior to their relocation (nor prior to old age). Furthermore, her study showed no significant relationship between life satisfaction and participation in formal organizations or solitary activities.

The cases reviewed above do not exhaust the literature in the field, but they are representative and sufficient to illustrate the weaknesses of activity theory. The so called "activity theory" appears to be no more than a vague philosophy of life congenial with the modern American value system, which subscribes to the myth of youth=happiness, it suggests that the best way to grow old is to stay young, and it prescribes activity as the way to achieve the goal. To date, it has not succeeded in providing a clear definition of the term activity itself, and therefore the studies on the subject have very often been contradictory. Activity theory has been accused of being less than a theory because it lacks "defined concepts and empirically verifiable propositions" (Dowd, 1975).

Apparently neither activity theory, nor disengagement theory has been successful in explaining "all of the myriad patterns of aging, many of which require further information of sociological and psychosociological nature to elaborate meaningfully" (Dowd, 1975).

The debate has highlighted the limitations of both theories and it has fostered the realization that activity and disengagement are only partial and conflicting explanations of aging. It is also indicated, however, that both perspectives can account for certain types of aging processes under specific conditions.

The dispute has directed attention to the challenge of conceiving a more general framework capable of incorporating both perspectives and at the same time of taking into consideration the multidimensional and transactional aspects of the aged individuals and their environment. These criteria are met by "exchange theory," which has been described as the most significant theoretical orientation in the field of social sciences in recent decades and which has been recommended for the study of interaction among individuals (Maddox and Wiley, 1976). Dowd (1975) suggests that aging, like any other process, can be analyzed as social interaction, affected not only by the "too often mentioned notions of widowhood, poor health, and social isolation, but also by the intricate process of exchange" between society and the aged.

Dowd's view of social relations between the environment and the aged individual as a series of social exchanges explains disengagement as the result of a power imbalance situation unfavorable to the individual. Negative power imbalance for the individual causes his "forced" disengagement; negative imbalance for society causes the

individual to remain engaged (i.e., active). The situation of power balance between society and the individual is not dismissed by Dowd, but instead it is considered as a rare situation working satisfactorily both ways (i.e., when the individual wants to withdraw and is allowed to do so, and when the individual wants to remain engaged and/or active and has no opposition from society) (see Table I).

TABLE I

CONSTRUCTS OF EXCHANGE THEORY.*

Readiness to Disengage	Society	
	Positive	Negative
Positive	a. Power balance: Mutually satisfying exchange.	b. Power imbalance: The individual with critical expertise is forced to remain engaged.
Individual		
Negative	a. Power imbalance: The individual with little critical expertise is forced to disengage	b. Power balance: Continued role incumbency is institutionally sanctioned.

*J. Dowd, 1975.

Social exchange theory has been recommended by Maddox and Wiley (1976), for it favors the understanding of "both the situational structuring of options and resources which constrain interaction, and

the tendency of participants to maximize their values in such a way that a fair outcome results." Even though it is not realistic to expect that a theory will accommodate all relevant phenomena equally well, it does appear that social exchange theory does have relevance for a number of social issues in social gerontology. An exchange perspective is implicit in the studies of intergenerational relationships and kinship networks (Sussman, 1976). Similarly, concepts of fair exchange and equity are involved in the process of delegating resources among different cohorts in society. Finally, conceptualizing behavior in terms of costs and rewards facilitates the analysis in terms of needs, values, and environmental opportunities and their effects on life satisfaction.

Theoretical Framework

The formulation of exchange theory as we know it today has been widely influenced by two different orientations in sociology: the individualistic and the collectivistic. The former is viewed as a result of the British Protestant individualistic orientation and postulates the centrality and autonomy of individual self-interests, wishes, and desires as a motive force in social action. The latter, considered as a legacy of the Catholic viewpoint and the French "collectivistic orientation," states that social processes are important to the degree that they contribute to the existence of society or other groups (Ekeh, 1974). Even though the polemic confrontations between the two traditions have yet to produce a synthesis, they have greatly contributed to the process of theory building.

Social exchange theory is usually associated with the names of Homans and Blau; however, its origin can be traced all the way back to Sir James George Fraser's work, Folklore in the Old Testament (1919).

Fraser introduced the subjects of cross-cousin marriage and marriage exchange into social exchange theory; he explained the tradition by linking it to economic motives (e.g., the Australian aborigines, having no equivalent in property to give for a wife, were compelled to offer, in exchange for her, a female relative, usually a sister or a daughter). Fraser suggested that economic motives of individuals in society lead to social exchange processes, and that the stabilization of such processes accounts for the origin of other institutions. He also explained power and social differentiation in society as an exchange process: the man with many sisters and daughters was rich; the man with none was poor.

Another early contribution to social exchange theory was made by Bronislaw Malinowski in his study of Kula exchange in the Trobriand Islands, Argonauts of the Western Pacific (1922). Malinowski was the first social scientist to "draw a sharp distinction between the concepts of economic exchange and social exchange or 'ceremonial exchange'" (Ekeh, 1974). The Kula exchange was described by Malinowski as a process carried out by the communities of a wide ring of islands. The articles exchanged were of two kinds only (necklaces and armshells) and they were traveling constantly in opposite directions. The items had symbolic rather than economic value and the exchange, regulated by rules and rituals, was of a permanent nature.

Malinowski concluded that the exchange had only social value since: the items (necklaces and armshells) were not regarded as currency; the transaction was restricted and could only be carried between partners; and, the permanent nature of the exchange between partners did not produce status differentiation. He suggested social psychological instead of economic motives for the Kula exchange. The importance of the Kula exchange is:

the fundamental human impulse to display, to share, to bestow [and] the deep tendency to create social ties through exchange of gifts. Apart from any consideration as to whether the gifts are necessary or even useful, giving for the sake of giving is one of the most important features of Trobriand sociology and from its very general and fundamental nature, I submit, that it is a universal feature of all primitive societies (Malinowski, 1922).

Malinowski suggested socio-psychological reasons since he saw the Kula exchange as an institution that met the needs of individuals while at the same time it helped to maintain society as an on-going concern. The fact that the exchange items were of two kinds only and that each kind was moving constantly in one direction, while the other moved in the opposite, was instrumental in helping Malinowski formulate the concepts of direct exchange and circular exchange (see Figure 1).

Figure 1. The armshells and necklaces in Kula exchange flow in opposite directions.*

*Ekeh, 1974.

Direct exchange takes place between any two partners and emphasizes their psychological needs. Circular exchange is spread out in time and space, suggesting the notion of organic solidarity in an otherwise

mechanically solidary society (Ekeh, 1974). The use of two items represents "the minimum and the maximum needed to work out a correspondence between the needs of the individuals and of society...[since] the use of only one item would rob the Kula of the here-and-now psychological satisfaction to be derived by individuals from mutual and direct exchange...and the use of three items...would upset the equality that is assumed to exist between the exchange partners" (Ekeh, 1974).

The strategy of deriving higher-order phenomena from the more elementary process of social exchange was received with dissatisfaction and opposed by Levi-Strauss, whose contribution to social exchange bears the mark of the French collectivistic tradition. Several assumptions underline this theory: first, social exchange is human and therefore sub-human animals are not capable of it; secondly, social exchange is a supra-individual process and individual self-interests may be involved in it but they are not capable of sustaining the exchange process (Ekeh, 1974); and finally, Levi-Strauss claims that items of exchange are culturally defined, that their importance lies not so much in the economic intrinsic value as in the symbolic extrinsic value, and that the exchange relationship comes before the things exchanged and is independent of them. In summary, social exchange is normative behavior, i.e., individuals involved in social exchange do not create norms and values that regulate their behavior, but rather carry institutional norms and values in the exchange situation (Ekeh, 1974).

From the above position, Levi-Strauss was able to offer several

observations. First, when there is abundance of a product of symbolic value, society does not interfere with its distribution by nature or chance. Shortage of products of symbolic value causes society to become involved with and to regulate its distribution (e.g., through exogamy and incest). Second, the cost of the exchange is assumed by the individual giver and is attributed to society outside the exchange situation rather than to individual receivers inside the exchange situation. Finally, the exchange situation is bound by the principle of reciprocity (Ekeh, 1974).

Levi-Strauss' principle of reciprocity, however, is wider than the usual definition, according to which an individual is morally bound to reciprocate another's action (known as mutual reciprocity). Levi-Strauss recognizes another aspect of reciprocity (i.e., univocal reciprocity), by which individual "A" gives to individual "C" in response to what individual "A" has received (or hopes to receive) from individual "B." Such exchange involves three or more actors who benefit indirectly, rather than directly, from each other. Generalized exchange (operating on the principle of univocal reciprocity) presumes equality of the partners but due to "the speculative character of the system, the widening of the cycle...[it] leads almost unavoidably to [status differentiation]" (Levi-Strauss, 1969).

Levi-Strauss' concepts of mutual reciprocity and univocal reciprocity are redefined and expanded by Ekeh (1974), who makes a distinction between exclusive restricted exchange, a situation of isolation in which the actors are the only possible partners, and inclusive restricted exchange, a situation in which the actors are operating in a larger whole and where the possibility of change of

partners exists. A typical feature of restricted exchange is the high degree of responsibility of the partners' behavior toward each other expressed by a high degree of concern for maintaining equality and for avoiding conduct offensive to the other partner.

Generalized exchange as formulated by Levi-Strauss has been observed empirically in various forms. The first type, univocal reciprocity, where partners operate a chain of univocal reciprocations to each other, has already been presented. Ekeh (1974) describes a second type of generalized exchange which he calls net generalized exchange. He recognizes two sub-types of this: individual-focused, and group-focused.

In the individual-focused net generalized exchange, the group as a whole benefits each member consecutively. Net generalized exchange in a party of five can be illustrated as: $ABCD \rightarrow E$; $ABCE \rightarrow D$; $ABDE \rightarrow C$; $ABDE \rightarrow B$; and $BCDE \rightarrow A$. This type of exchange can be found easily in farming communities in the forms of either social or economic exchanges. The second sub-type (i.e., group-focused net generalized exchange) is the opposite of the first. In this type, individuals give successively to the group, while as part of the groups, they benefit from others' contributions. A group-focused net generalized exchange in a party of five can be illustrated as: $A \rightarrow BCDE$; $B \rightarrow ACDE$; $C \rightarrow ABDE$; $D \rightarrow ABCE$; and $E \rightarrow ABCD$.

Generalized exchange lacks the emotional factors that characterize restricted exchange, and the trust of the partners in the system is its essential quality. Ekeh (1974) observes that even though generalized exchanges take place and are visible in society, the determination of rights and duties in terms of reciprocity between groups and

individuals is problematic and in clear need of empirical research.

However, modern empirical research after Levi-Strauss has been limited to restricted exchange and has been influenced greatly by the individualistic tradition in the social sciences. Two authors have been the major contributors to modern social exchange theory: George C. Homans and Peter M. Blau.

Homans, whose work on exchange theory preceded Blau's, strongly criticized Levi-Strauss' position. Homans objected to the concept of generalized exchange and to the limited items of exchange (i.e., women). His exchange theory stressed restricted exchange between two individuals and the utilitarian value of the items to be exchanged, and it placed special emphasis on the psychological and economic needs of the individuals involved in the relationship.

One should not assume, however, that in reacting to Levi-Strauss, Homans was greatly affected by him, since the major influence in his work came from the writings of B. F. Skinner on behavioral psychology (Simpson, 1972). Homans' basic perspective consisted in recognizing that if an animal or a person wants something, he will do things that in the past have proven successful with respect to his desires.

He will try to avoid unpleasant experiences when he can and will endure limited amounts of them if they are unavoidable costs of getting things he wants. He will continue to repeat behaviors that have lead to rewards or to escape from punishments only if they continue to produce the desired effects; if the rewards stop coming, he may display anger and he will gradually stop doing the things that formerly brought them... no matter how highly an individual values something, he becomes satiated after he has received a large amount of it, and he then seeks some other kind of reward. If some event has always occurred at times when a given behavior was rewarded or punished, the event itself becomes a stimulus and can produce the behavior or its avoidance (Simpson, 1972).

Homans suggested that people reward and punish each other in interaction in the same way animals behave toward any source of reward or punishment. He indicated, furthermore, that economic transactions are just one specific kind of social transaction, and that it is possible to apply business concepts and terminology to basic social transactions. By combining behavioral psychology and economics he derived the fundamental definitions of his exchange theory. The basic propositions of social exchange behavior, as presented by Homans, read:

- (1) If in the past the occurrence of a particular stimulus-situation has been the occasion on which a man's activity has been rewarded, then the more similar the present stimulus-situation is to the past one, the more likely he is to emit the activity, or some similar activity, now.
- (2) The more often within a given period of time a man's activity rewards the activity of another, the more often the other will emit the activity.
- (3) The more valuable to a man a unit of the activity another gives him, the more often he will emit activity rewarded by the activity of the other. ('Value' refers to the degree of reinforcement or punishment that is received from a unit of another's activity).
- (4) The more often a man has in the recent past received a rewarding activity from another, the less valuable any further unit of that activity becomes to him.
- (5) The more often to a man's disadvantage the rule of distributive justice fails of realization, the more likely he is to display the emotional behavior we call anger. (The rule of distributive justice is stated as follows: 'A man in an exchange relation with another will expect that the rewards of each man be proportional to his costs--the greater the rewards, the greater the costs--and that the net rewards, or profits, of each man be proportional to his investments--the greater the investments, the greater the profit') (Homans, 1961).

For Homans, the exchange process is a restricted one; he excludes generalized exchange from his theoretical propositions and limits them to a dyadic interaction. His concept of distributive

justice consists of two primary principles: the principle of fair exchange, which is based on the comparison by Person of his/her rewards, costs, and profits with those of his/her exchange partner(s) (e.g., "when each man is being rewarded by some third party, he will expect the third party to maintain equal rewards between the two of them [Person and Other] in the distribution of rewards" (Homans, 1961)); and the principle of profitable exchange, which is based on the comparison by Person of his/her costs with his/her rewards. The fact that Homans only recognized dyadic exchange, yet introduced more than two partners in his principle of fair exchange, underlines a major problematic aspect surrounding his theory of social exchange.

Ekeh (1974) suggests an alternative way of looking at the matter. He claims that fair exchange is possible only in a dyadic relationship where the comparison between costs and rewards is direct and easy to assess. In a multiperson group, comparisons tend to be intrapersonal (i.e., the size of the group complicates or makes impossible the comparison). "In two-person groups, whose members are engaged in restricted exchange, interpersonal comparisons and fair exchange prevail. In multi-person groups, with an emphasis on generalized exchange, intrapersonal comparisons and profitable exchange prevail" (Ekeh, 1974).

Distributive justice according to Homans follows three basic rules: first, the value of what an individual receives from the members of the groups in one field of activity should be proportional to the value to them of his/her contributions in another field; second, the value of what a member receives from other members should be proportional to his/her investments; and third, what a member gets in the way of reward should be directly proportional to his/her costs

provided that his/her inferiors are not able to afford such costs (Homans, 1961). In summary, rewards are distributed "in congruence with contributions, investments and leadership costs" (Homans, 1961).

A final element of importance in Homans' exchange theory deals with conformity and status. Homans' study reveals that if a group is divided according to the status of its members, the following patterns will occur: high status members will adhere to the most fundamental norms; middle status members will adhere most strongly to all norms since they have little to gain and much to lose from nonconformity; and low status members will conform the least, since their failure to conform involves little or no risks. Although Homans does not specifically analyze it, it is possible to see the correspondence between the rule of distributive justice (or his statement of it) and the ranking of various rewards and costs of conformity and/or deviance. Simpson (1972) observes that:

in the two major rewards of status - social approval and power ... - the highs, middles, and lows rank from top to bottom in that order...In the five costs related to status and conformity (performing much activity, performing scarce activity, foregoing alternative rewards obtainable from other groups, foregoing the rewards that deviant behavior might bring, and fearing the loss of one's status), lows incur the fewest of all these costs, highs incur more of the first three of these costs than do middles. But middles incur more costs than highs in foregoing the rewards of deviance and in status anxiety. Thus, the positions of highs and middles are reversed in two of the five costs and the first criteria of distributive justice, that rewards be in line with costs, is not perfectly met. Nevertheless, it seems likely that if it were possible to measure the costs and rewards and add them up, highs would be seen to incur the greatest total costs just as they gain the greatest total reward so that the rewards/costs criterion of justice would be satisfied (Simpson, 1972).

After costs and rewards, the analysis should continue to include profits. Profits in economic terms can be obtained by subtracting costs from rewards; however, "subtraction requires equal interval measurements

and social psychologists lack an equivalent of the economist's dollars and cents that would make this calculation possible in the study of most social exchanges" (Simpson, 1972). Homans' combination of behavioral psychology and economics has posed difficulties which were not encountered by Malinowski or Fraser, whose social exchange theories were predicated entirely on either psychological needs or economic motives.

Economic motives are also prevalent in Blau's theory of social exchange: "relations are contingent on rewarding reactions from others and...cease when these expected reactions are not forthcoming" (Blau, 1964). However, even though Blau acknowledges the importance of economic motivations in social transactions, he accepts the fact that there are important differences among them. Social exchanges create feelings of obligation and gratitude, while economic exchanges do not; they are more personalized than economic exchanges; and, they do not have a single medium of exchange like money in economic exchanges. Finally, obligations incurred in social transactions are not clearly defined in advance while in economic exchanges exacted obligations are agreed upon (Blau, 1964). Blau's theory of social exchange, like Homans', is a theory of restricted exchange; nevertheless, he recognizes that "most associations...are not artificially isolated pairs... but are part of a broad matrix of social relations" (Blau, 1964).

In summary, Blau admits the basic aspect of inclusive restricted exchange, but to it he adds the concept of indirect exchange. Originally, in generalized or circular exchange at least three partners interacted; in Blau (1964), mediating social norms or organizations take the place of the partners: "Social norms substitute indirect

exchange for direct exchange between individuals."

The emphasis of Blau's exchange theory, however, lies not so much on direct or indirect exchange, as on the phenomenon of power, since power is the natural outcome of social exchange processes. He defines power as "the ability of the persons or groups to impose their will on others despite resistance through deterrence either in the form of withholding regularly supplied rewards or in the form of punishment" (Blau, 1964). The source of power is always one-sided dependence; interdependence and mutual influence of strength indicate lack of power. The way a person establishes power over others is by supplying services that they cannot obtain somewhere else. An individual in need of a service has several alternatives: first, he/she can supply others with a service they want badly enough to convince or induce them to offer their service in return; second, he/she can coerce them to furnish the service; third, he/she may obtain the service elsewhere; and fourth, he/she may learn to resign himself/herself to do without the service. The absence of the four alternatives defines the conditions of power in general. Specifically, a person who has all the resources required as effective inducement for others to furnish his/her with the services and benefits he/she needs is protected against becoming dependent on anyone (Blau, 1964).

The main element in the process of obtaining power or differentiation of status is time: "Time is a generalized means in the competition for a variety of social rewards" (Blau, 1964). Blau indicates that within a framework of time, a differentiated power structure arises in the course of competition for scarce goods which depends on four major factors: wealth, of major significance to induce others to

furnish services; prestige, or acknowledgement of outstanding abilities; obligation, or dependence on furnished services; and approval, or recognition in the form of shared consensus of superior social standing. A major implication in Blau's analysis of power is that inequality is a legitimate value premise in social exchange relations but the social exchange equation always balances between the two sides: if "A" does not have enough to reciprocate "B" for services rendered, "A" compensates "B" by recognizing "B's" power over "A" (Ekeh, 1974).

Before concluding this overview on social exchange theory, it should be noted that in considering its application in the field of social gerontology, Maddox and Wiley (1976) have suggested the inclusion in the analysis of exchange of "the observed fit among personal needs, values, and environmental opportunities." Similarly, J. Gubrium (1973) proposes that, from the exchange perspective, the principle of balanced reciprocity be used as a socio-environmental approach: "In terms of the analytic scheme, there are two kinds of reciprocity between persons and contexts. One of these arises out of the relationship between a person's action and his individual activity resources. The other emerges out of the interaction that takes place between persons and others who together hold and share expectations on behavior."

According to Gubrium (1973), the socio-environmental perspective is empirically grounded on the "steady accumulation of thinking and evidence in the gerontological literature directed at understanding the relationship between social interaction and morale by combining environmental and personal concepts." There is some overlapping of concepts between Gubrium's "individual activity resources" and Blau's "factors

influencing the power structure." They both recognize the significance of wealth in obtaining services and its implication for behavior flexibility. Gubrium, however, expands the notion of "individual activity resources" to include health and social supports, while Blau stresses prestige, obligations, and approval.

The second area of basic agreement between Gubrium and Blau deals with the expectations emerging from the interaction. Gubrium (1973) sees them as one of the two essential aspects in the analysis of social interaction. Expectations relevant for individual behavior are based on personal and social contexts: with respect to himself/herself, an individual expects a certain degree of behavior flexibility based on his/her own resources; and with respect to his/her social context, the individual responds to others' expectations of him/her. Gubrium's position is in fundamental agreement with Blau's:

The study of exchange process in social associations must take into account the ways in which the values of the rewards being exchanged are modified by the expectations of the participants and, ultimately, by the previous distribution of rewards that govern these expectations...the girl who was very popular in high school probably suffers more from lack of popularity in college than the girl who was not popular in high school (Blau, 1964).

Gubrium's socio-environmental approach to social gerontology appears to be consonant with social exchange theory. The possible objection to his extending the analysis of social transactions to the socio-environment can be easily argued since Homans, in his conception of distributive justice, had already substituted "rewarding and profitable activities for 'goods' and services and interaction for 'society'" (Ekeh, 1974).

Summary

In reviewing the literature on theories of aging, it is apparent that there has been a considerable debate in recent years regarding activity and disengagement theories. The debate has directed attention to the fact that, although "theoretically distinct, both have suffered severe explanatory problems methodologically, as well as empirically" (Gubrium, 1973). The debate has furthermore indicated the existing need for a theoretical framework capable of explaining the complex transactions between individuals and the environment with which they interact. Exchange theory has repeatedly been suggested as a perspective "particularly consonant with contemporary emphasis on dynamic, situational, and transactional aspects of behavior" (Maddox and Wiley, 1976).

The literature has shown that exchange theory is differentiated and it reflects distinct traditions in sociology and various orientations of researchers. It has also demonstrated, however, that certain basic ideas are shared among them: economic principles are applicable to social exchange; elements of reciprocity are essential aspects of the exchange relationship; restricted exchange and generalized exchange outline the structure of reciprocity in exchange processes; differentiation of status resulting from competition for resources represents the logical outcome of the exchange process; and, expectations of the participants, based on personal and social contexts, have definite effects on the relationship.

It is the intent of this researcher to take advantage of the above described central concepts of exchange theory in addressing the topic of life satisfaction among the elderly.

CHAPTER III

HYPOTHESES AND METHODOLOGY

Dependent Variable

The study of life satisfaction has been and continues to be a prominent subject of investigation in the field of social gerontology. Several terms have been used to describe well-being (e.g., morale, happiness, competence); and a variety of techniques as well as criteria have been employed in research. Linda George (1979) suggests that the use of any measurement of life satisfaction should be preceded by a careful assessment and understanding of the concepts and measures: "Unless we know what these concepts mean and how they can be measured effectively, we are not prepared to use them in rigorous terms." Four issues are presented as the most salient and pertinent to the study of life satisfaction concepts: first, distinction among satisfaction-related constructs; second, global vs. domain-specific measures; third, sensitivity to change; and fourth, age changes and age differences.

With regard to the first, George (1979) offers a proper definition of the major concepts, together with suggestions for using measures that match the intent of the investigation. She defines "life satisfaction" as an evaluation "of the overall conditions of existence as derived from a comparison of one's aspirations to one's actual achievements," or as "a cognitive assessment of one's progress toward desired goals." Morale is described as a quality related to "courage, confidence, enthusiasm that makes [it] possible for a person to endure trials," and happiness

is seen as a transitory mood, reflecting a temporary state of affairs. The second issue (i.e., global vs. domain-specific measures) deals with the difference in the type of information sought. Global measures refer to life as a whole, but do not define the frame of reference of the respondent; in domain-specific measures, however, the referent is specified (i.e., reasons "why" people are satisfied are investigated). Sensitivity to change reflects the problematic aspect of the time element in life satisfaction, happiness, and morale. In this respect, researchers should be warned against the possible deficiencies and shortcomings of various instruments in detecting changes over different periods. Age changes and age differences also relate to the issue of change in time of life satisfaction, happiness, and morale. It has been suggested that patterns of responses to measures of life satisfaction and happiness vary significantly among different age groups. "In general, younger individuals scored high in happiness, but relatively low in life satisfaction. For older persons the pattern was reversed; these individuals scored relatively low in happiness but quite high in life satisfaction" (George, 1979). It is not clear at this point if the high scores of life satisfaction in elderly persons reflect fulfillment of cherished goals, lowering of aspirations in order to rationalize actual achievements, or simply cohort differences.

Since the focus of this research deals with adaptation to changes that are permanent in character rather than transitory, a life satisfaction index is believed to be more useful than a measure of happiness and morale. The instrument should also reflect satisfaction of life as a whole, rather than satisfaction for specific aspects. Neugarten, Havighurst, and Tobin (1961) identified two major approaches to the

measure of life satisfaction of the elderly: one focusing on the overt behavior of the individual and his level of activities and social participation; the other focusing on the individual's internal frame of reference, his evaluation of present and past life, with only secondary attention given to social participation. They suggested the second approach as more appropriate since the individual is the best judge of his being, the value judgment of the investigator can be minimized, and it is important to measure old age by other than middle-age standards. From the above described frame of reference, Neugarten, Havighurst, and Tobin (1961) developed a measure of successful aging or Life Satisfaction Ratings (LSR) which were utilized in the Kansas City Study of Adult Life.

In examining the measures of adjustment and morale, Neugarten and her associates identified five components of well-being or life satisfaction: zest for life as opposed to apathy; resolution and fortitude as opposed to resignation; congruence between desired and achieved goals; high physical, psychological, and social self-concept; and a happy, optimistic mood tone. In consideration of the fact that the LSR required a long interview with the respondent, and appeared to be too cumbersome to be used on a large scale, two more suitable instruments were devised: the Life Satisfaction Index A (LSIA) and Index B (LSIB). For the purpose of this research LSIA was judged as the better option in consideration of the fact that the instrument permits the respondents to evaluate their present, past, and future lives from an internal frame of reference and it tends to minimize social and investigator biases toward social and activity involvement. Finally, in view of the fact that the sample was expected to include mostly urban, working-and

middle-class persons, and to exclude financially deprived or critically ill people, it was believed that the similarity of factors with the Kansas City Study would make LSIA a more appropriate instrument.

Independent Variable

There is a basic agreement among social gerontologists regarding the factors believed to influence life satisfaction. Gubrium (1973) believes that life satisfaction is affected by "activity resources" and by "context reciprocity." The former, which refers to the capacity of an individual to be involved in the multiple aspects of everyday life, is a function of many resources. Although Gubrium recognizes prestige, education, and employment as valuable resources, he acknowledges only three factors as significant: health, solvency, and social support. "Context reciprocity" concerns sources of expectations influencing behavior. Gubrium describes two kinds of context: personal (i.e., what a person expects of himself), and social (i.e., what others expect of him).

Gubrium's findings concur with research by Elmer Spreitzer and Eldon Snyder (1974), who reported perceived health and financial adequacy as main predictors of life satisfaction. Edman Palmore and Clark Luikart (1972) also found self-rated health to be the strongest variable related to high satisfaction, followed by organizational activity, internal control, social support, and status. Eric Pfeiffer (1970), indicated that differences among long-term survivors and short-term survivors consisted in a "constellation of biological, psychological, and social factors...persons with high intelligence, sound financial status, well-maintained health, and intact marriages may be

expected to live significantly longer than their less intelligent and poorer brothers and sisters whose health is also declining and whose marriages are no longer intact."

Resources, defined as wealth, power, and success recognition are also recognized as important influences for the life quality of the aged (Richard Williams, 1960): "A crucial question about the aging process is the extent to which it involves shifts in social position and, particularly, the extent to which such shifts in turn change the actor's ability to satisfy these basic needs." Resources among the aged, in a cross-cultural setting, have been investigated by Irwin Press and Mike McKool (1972), who reported that the status of the elderly is dependent upon: (1) accumulation of knowledge; (2) accumulation of resources or goods; and (3) ability to continue to perform a valued activity or work.

There appears to be, within certain limitations, a definite relationship between health and socioeconomic status, and between socioeconomic status and friendship formation and maintenance (Gubrium, 1973).

Marjorie Fiske Lowenthal and Betsy Robinson (1976) report that morale is affected by family network, while Morris Medley (1976) indicates that the greatest impact on life satisfaction is produced by satisfaction with family life. However, some researchers suggest that the importance of friendship and strong family relations should not be perceived in terms of their intrinsic value, but rather in terms of preventing isolation. Frances Scott and Ruth Brewer (1971) state that the primary importance of marriage partners in preventing isolation in old age is well illustrated by research. The functions of siblings (and to a lesser extent friendship) becomes important, particularly

if the elderly person has not married or lost the married partner and if children are not in close proximity. Others (Shanas et al., 1968) suggest that the critical factor in life satisfaction is not isolation per se, but rather the variation in social network (i.e., social loss), while Zena Blau (1973) reports low morale among relatively isolated people who have lost a major role. Nevertheless, research points out that close family relations are not always associated with high life satisfaction; it appears that excessive dependency, when a person may feel that he/she is a burden on his/her friends and relatives, is likely to have a negative effect on morale (Berghorn et al., 1978).

Even though it seems reasonable to accept the fact that informal relations are important factors contributing to life satisfaction and morale of the elderly, research findings are rather ambiguous in this regard. Sussman (1976) and Scott and Brewer (1971) suggest that research could benefit from an improved theoretical perspective or a better understanding and concurrence of the terminology involved.

In partial disagreement with the above, some authors indicate that life satisfaction is affected by involvement with formal rather than informal relations. Graney (1975) and Palmore and Luikart (1972) report organizational activity as a major influence in life satisfaction. Research findings from other authors, however, appear to indicate that participation in formal organizations might be a function of social class, sex, or even previously established life-styles (Lowenthal and Robinson, 1976).

Another factor associated with socioeconomic status and significantly related to life satisfaction is living arrangements. Berghorn et al. (1978) define it as a basic condition of physical security.

Although the definition of the term "living arrangements" is still being debated, there is clear documentation that housing can have a decisive impact upon the life styles and well-being of older persons (Carp, 1976). Favorable reactions following the move to special housing for the elderly have been reported consistently by Carp (1976), Donahue (1966), Lipman (1968), and Sherman (1974).

Another determinant of life satisfaction within the context of the environment is transportation network. Automobile ownership is considered in our culture to be both a status symbol and "the" most essential means of transportation. Without auto ownership, the major phenomena of physical restructuring of urban environment and of suburbanization could not have occurred in our society. A simple task like "carrying home the groceries" has become a physical impossibility without a car. For many elderly persons, automobile ownership must be relinquished at some time in their lives, either because of physical problems or financial difficulties. The hardship has repeatedly been noted by researchers and policy makers. Berghorn, et al. (1978) reported that self-transportation as an influence on morale is attributable to two interrelated explanations: mobility enhancement and independence enhancement. Gubrium (1973) indicated that "social context" in terms of choice of friends and structure of social relationships were affected by distance of residence and mobility patterns.

The impact of resources on life satisfaction of the elderly has been investigated at length, and a review of literature indicates that a consensus has emerged among researchers regarding the positive relation between the two (i.e., resources and well-being). The consensus extends to the fact that resources should not be limited to financial

but should include social significance as well. The concept of resources should embrace health, social support, social status, and housing and transportation. The importance of resources vis-a-vis life satisfaction does not rest on the intrinsic meaning of the term, but rather on the extrinsic meaning of it, or the influence (of resources) in providing each person with a degree of flexibility in the face of events of everyday life (Gubrium, 1973; Berghorn, et al., 1978).

However, if life satisfaction is to be examined within the framework of social exchange, social contexts need to be evaluated not only in terms of present, but in terms of past expectations as well. Blau (1964) and Gubrium (1973) have already been cited to explain how past experiences and past hopes shape attitudes and ability to cope with change. Change and adjustment to change are basic elements of life, from childhood to old age, but some authors believe that the rate of change and the need for adjustment increase with age and add to the degree of burdens that various situations place on the aged (Gubrium, 1973; Lowenthal, 1977).

While change has been for years a subject of intensive investigation by major scholars (Birren, 1964; Neugarten, 1977; Secord and Backman, 1961), a complete sociopsychological theory of aging "integrating individual developmental change with the normative social changes which take place as the individual moves across the life course, and with the broader societal changes of this particular era..." (Lowenthal, 1977) is yet to be developed.

Although it is reasonable to expect that such a global approach to change is necessary if an integrated and successful theory of aging is to be developed, the task appears rather massive and beyond the

scope of this project. Consequently, change will be addressed only in terms of social resources and social contexts versus past expectations and past experiences. According to Gubrium (1973), the links between changes in resources and flexibility of behavior are located in three premises:

Persons become aware of changes in themselves in comparing their abilities at different stages of their life span. This comparing process makes vivid any behavioral impact of decline of resources. Persons also may become aware of their behavior flexibility through the experience of others. And last, change in activity resources place a burden upon ongoing social interaction. Because of interpersonal commitments, such burdens may be momentarily tolerated. In the long run, however, an inadvertent process of social isolation typically emerges. (Gubrium, 1973)

In a similar manner, Busse (1969) suggests that social deprivation and hostile social influences have negative consequences for the life satisfaction or morale of elderly people, while favorable changes (in areas such as activity or social interaction), have positive influences.

In conclusion, survey of literature indicates that concurrence exists among researchers regarding the positive impact of favorable resources, contexts and changes and, similarly, the negative impact of unfavorable resources, contexts, and changes in the life satisfaction of the elderly.

From this review of literature, two hypotheses have been formulated to provide order for our study:

Hypothesis 1. Life satisfaction of the elderly is positively correlated with their social resources and social contexts.

Hypothesis 2. Life satisfaction of the elderly is directly correlated with the quantity and quality of changes in their social resources and social contexts.

The Sample

The data for this project were collected from retired employees of a major corporation in Portland, Oregon. Two random subsamples of 20 respondents each (or a total of 40 respondents) were obtained from lists of personnel retired from the company in the years 1973 and 1978.

The decision regarding the samples was based on several factors: first, although it was believed important in this study to avoid financially deprived respondents, it was considered essential to include people of different socioeconomic backgrounds in order to minimize class bias. The requirement was easily met since the organization from which the subsamples were selected possessed a great number of hierarchical levels and of occupational roles. The structural differentiation within the organization was reflected in the subsamples, which ranged from unskilled blue collar workers to white collar executives. Second, due to the fact that retirement has been described as a problematic experience needing a process of adaptation, as a normal transition stage or as a favorable change of status (Busse, 1969), it was decided to avoid in the sample the possible bias deriving from a specific stage of retirement. Therefore, two subsamples of respondents were selected, one with people who had retired in the year preceding this study, the other with people who had retired five years earlier, in order to control for adjustments to effects of retirement. Third, it was resolved to exclude very old people for obvious reasons such as difficulty of interviewing and obtaining reliable data but, at the same time, it was believed indispensable to obtain samples of respondents of different ages. Due to the fact that not all people retire at the legal age, it was possible to obtain subsamples with an age range of approximately

eleven years. Fourth, it was considered expedient to limit the interview to respondents residing in the Portland Metropolitan Area, even though the corporation in question has been established throughout the state of Oregon for many years. It would have been possible, but not feasible, to interview respondents from different geographical areas.

It seems justifiable to conclude from the above that even though an effort was made to avoid sample bias in this study, the aim was only partially accomplished. It should be recognized that the respondents were working class and middle class retired urban and suburban dwellers, and all generalizations and interpretations of data should be limited to this context and avoid inferences to other social classes or rural areas.

Of the forty people interviewed, twenty had retired during the year preceding the study; the other twenty retired five years earlier. Sex of the respondents included twenty-five males and fifteen females. One person was a widow, seven were divorced, and thirty-two were married. Of the thirty-two who were married, only four had been married for less than thirty years. The mean years of marriage for the respondents was thirty-five years. The ages of the group ranged from sixty to seventy-one, with the mean age at sixty-four. In regard to education level, the range was from eighth grade to some graduate work, with the mean of thirteen (years of school). All the people had worked for the company at least twenty years, one had worked for forty-one years, and the mean for the group was approximately thirty-one years. Only seven of the forty had retired due to compulsory age; of the remaining thirty-three, three had health problems, two had difficult family situations, seven disliked the job, sixteen felt they

had reached financial security before mandatory retirement age and wanted to enjoy life, and five retired due to a combination of reasons. Only six of the respondents felt they would like to return to work, six had no feelings on the matter, twenty-eight expressed strong opinions against ever returning to work.

Regarding the hierarchical positions within the company, the subsamples included two janitors or unskilled blue collar, thirteen unskilled clerks, six technical or skilled blue collar workers, six skilled clerks, seven first level managers, four middle level managers, and two upper level managers.

Most of the respondents appeared in good health: twenty-five reported to be either in good or very good health; eight claimed to be "average" and seven indicated having poor health. However, when asked if they could perform physical work, only eight, or twenty percent, stated they had to be careful in not exerting themselves too much; thirty, or seventy-five percent, claimed that they could do strenuous work. All the respondents felt they could travel whenever they wished and expressed no physical hardship regarding their ability to visit friends and family. Approximately the same percentage of people who claimed to be in poor health, or twenty-two percent, indicated that they were less active after retirement; thirty percent noted no difference, while forty-eight percent stated that they were more active after their retirement. The statements of the respondents regarding their level of activities appear to be congruent with their statements regarding mobility. More people spent time outside their house daily during the year 1978 than they did a few years earlier.

Besides enjoying good health, most of the respondents appeared to have good social contacts and good financial resources. Thirty-six, or ninety percent, of the respondents expressed that they had somebody, either friend or family, to share problems and important things with. Thirty-nine, or ninety-seven percent, reported to be either moderately or highly satisfied with their residence and thirty-seven, or ninety-two percent, indicated that they were either moderately or highly satisfied with their present financial situation.

All but one had at least one car, and the person who did not stated that the reason for not owning a car was that she never liked to drive, and that she used the bus quite regularly, and a taxi occasionally.

From the above data, it appears that most of the respondents had strong social supports, long lasting marriages, a satisfactory financial situation, and reasonably good health. Both data and personal observations indicated to this interviewer that, as a whole, the respondents appeared to belong to a rather privileged segment of American elderly.

Data Gathering Procedure

Two lists with the names of retired personnel were obtained from a corporation in the Portland area. The first list contained the names of seventy-nine people who had retired in the year 1973; the second contained the names of seventy-six people who had retired in the year 1978. The names on the lists were ordered in the chronological sequence in which people retired. Although a rule existed at the time according to which people had to retire when they reached the age of sixty-five, people in fact retired at different ages and at different times of the

year with no apparent order or pattern. Even though it appeared that the lists were ordered randomly, it was decided to draw the two needed subsamples at random in order to avoid biases.

For this project, the Rand Corporation table of random digits was used to ensure randomness of each subsample. The random numbers obtained from the tables were used to select the samples from the original lists.

After matching the obtained numbers with the names of the people, a representative of the company was contacted and informed of the intent and scope of the project. The reason for contacting the company was twofold. First, it was believed unethical to proceed without notification in a research project that included the possibility of uncovering information of a delicate nature for the company. In this respect it was made clear that the intent of the project was to investigate life satisfaction of the elderly; that it was expected that past and/or present company policies and practices had nothing or little to do with life satisfaction of retired employees; and that the right of privacy of the company and the workers was going to be respected and given first consideration.

The second reason for contacting the company was to obtain assistance in locating the respondents. Since the company maintains an active file of past employees, with their current address and other valuable information, it was believed that the simple request of addresses would not constitute too much of an inconvenience for the company. The representative of the company was very considerate in satisfying the request and in cooperating with the project. The only objection from the company consisted in releasing information which

could be described as private (i.e., people's addresses) without their consent. The company representative therefore offered to contact by telephone all the people in the two subsamples, to inform them of the project, and to ask if they wished to participate. Not all the persons could be contacted, and not all the ones who were contacted agreed to cooperate. Some people apparently were not in town; others were ill or too busy at the time. A total of seven persons in the initial 1973 selection and ten in the initial 1978 selection were unable to participate. The final samples were derived from the original selection procedure which allowed for replacement without distorting the randomness criteria.

Two final lists of people who consented to be interviewed were provided by the company during the first week in May, 1979. The researcher contacted all the respondents by telephone, offered information regarding the project and arranged for a time and a place for the interview at the convenience of the respondents.

The interviews took place during the summer months of the year 1979. Although it was intended to complete the interviews in a reasonably brief period, it became clear after the first few contacts that the task was going to require more time than expected. Several people were on vacation or were ready to leave for one, while others still had previous commitments; as a result, appointments were delayed for several weeks.

The respondents did not appear to have negative feelings toward the project; the interviewer felt that she was dealing mostly with very busy and engaged people, who took advantage of the summer months for their travels and activities. A few of them manifested concern regarding

their participation in the study since they felt that they "had no problems," and were "very satisfied" with their lives, and, therefore, felt the information they could offer would have very limited value in solving problems related to the elderly. Others indicated that they did not believe they had very good answers, since they considered themselves "very average" people. They were all repeatedly assured that the intent of the study was not to study unhappy or abnormal people, and that information from average and well adjusted persons was valid and welcomed. The majority of the respondents answered favorably to the request for the interview, offered their residence for the meeting, and expressed interest and praise for the effort.

Thirty-four of the interviews took place in the house of the respondents, one in the house of the interviewer, three in the library of Portland State University, and two in restaurants. The interviews lasted from fifty minutes to two- and one-half hours; the average length was approximately one hour and fifteen minutes.

A questionnaire was constructed with the intent of avoiding problems with the respondents; therefore, questions of a very personal nature were purposely excluded. The topics were varied to facilitate the interview, and several questions were open-ended in order to allow the person interviewed to express his/her feelings freely.

This interviewer was pleasantly surprised at the interest and enthusiasm of the respondents. They tried to respond to all questions and appeared concerned in giving honest answers; they were generous with their time and told countless interesting episodes and details of their lives. A few were amused at the questions, others said that the

interview forced them to think about their own life in a way different from what they had been accustomed. When asked if they felt uncomfortable, they answered negatively and stated that they enjoyed it. Some of the males and two female respondents had their spouse present during the interview. The only lively comment and disagreement occurred when a male respondent failed to remember how many years he had been married; fortunately together with a bad memory he had a good sense of humor and recuperated quickly from the episode.

Although none of the persons interviewed admitted to being severely ill, it was evident in some cases that the conversation was strenuous for the interviewee. In such cases, the interviewer offered to conduct the interview in more than one session or to stop for a break. None of the apparently ill people accepted the offer; therefore, the interviews were conducted as briefly as possible.

The majority of the respondents gave the impression of being in reasonably good health and good spirit and did not demonstrate any eagerness or rush to conclude the interview. Many of them asked questions regarding the project and the reason for the interviewer's interest in the subject. Several insisted on showing their house, their furniture, their hobbies and collections, their dog, their family album, their jewels, and in one case, their safe. A few of them invited the interviewer to return in case of another study, or just to stop and chat for awhile.

The Instrument

A questionnaire, including both standardized and open-ended questions, was constructed to measure the relationship between life

satisfaction of the elderly and their social resources and social contexts, within the framework of social exchange theory.

The instrument was administered verbally by this researcher, who recorded answers to standardized questions, and took notes regarding comments to open-ended questions. The questionnaire was divided into two parts. One part consisted of the Life Satisfaction Index A (Appendix A) (Neugarten et al., 1961) in which twenty items were to be answered in a continuum of five responses ranging from "strongly agree" to "strongly disagree." The Life Satisfaction Index A measured the dependent variable. The rest of the questionnaire measured the independent variables and consisted of 113 questions dealing with items believed to be relevant to the study of life satisfaction (Appendix B).

Questions measuring social resources and social context (Figure 2) were inserted in the instrument to test Hypothesis 1, while items measuring change of resources and social contexts were used to test Hypothesis 2.

Social interaction or social support was investigated within the framework of net-generalized exchange: i.e., questions examined the costs and rewards of the relationships between respondents and groups with whom they interacted (family, friends, and formal associations). The differentiation of status resulting from the interaction process was analyzed by questions dealing with wealth, prestige, obligations, recognition, and power. A set of items in the instrument dealt exclusively with social resources, which included biological factors like health, and material factors like wealth (already mentioned), housing, and transportation. The principles of fair exchange and profitable exchange were considered in correspondence with the concepts

Figure 2. Diagram of social exchange theory

of prestige, obligations and recognition. Expectations and social contexts were analyzed by items measuring difficulty of dealing with physical and social environments. Finally, although no hypotheses were stated regarding disengagement and activity, a set of items dealing with retirement and activity were included in the instrument, since it was believed that they could add valuable information to the evaluation of exchange theory.

Data Analysis

The first step in analyzing the data consisted in determining the similarity of differences between the respondents who retired in 1973 and the respondents who retired in 1978. For this purpose, t-tests were computed to compare means for the two groups.

In addition, data from two subsamples were crosstabulated to observe the joint distribution of all variables by group, and chi-square statistics were calculated to determine whether or not the distribution of each variable was independent of the group.

The next series of analyses was performed in order to test the first hypothesis that life satisfaction of the elderly is positively correlated with their social resources and social contexts. Pearson correlation coefficients were computed to measure the strength of relationship between dependent and independent variables. However, since the Pearson correlation coefficient measures only linear relationships, eta values were also computed in order to check for non-linear relationships as well. Finally, in view of the fact that even significant Pearson correlation and eta coefficients measure relationships only between two items at a time, and that more meaningful inferences could

be drawn from composite scores based on several items, scales were constructed. The procedure consisted in computing correlation matrices among items hypothesized to be significantly related. Scores of internally consistent items were standardized, then added and averaged, and ultimately, correlated to life satisfaction, or the dependent variable.

The last phase of the study was devoted to testing the second hypothesis that life satisfaction of the elderly is positively related to favorable change in social resources and social context. All items measuring change which, as evident in the questionnaire, were answered in a continuum of four to seven responses, ranging from very positive to very negative, were recoded as follows: changes considered favorable to the respondents were given a numerical value of +1; changes considered unfavorable to the respondents were given a value of -1; and no change was scored 0 (zero). Subsequently, all items involving change were added and the composite scores were correlated with life satisfaction.

In analyzing the results, the conventional rule of reporting correlations with a level of significance of .05 or higher was observed. However, in the analysis related to construction of scales, the acceptable level of significance was lowered to .09 in consideration of the following; (1) the limited range of the sample, (2) the exploratory nature of the research, and (3) the higher reliability of composite scores.

In presenting the results of this study it was decided to combine quantitative and qualitative data, since the open-ended questions and conversations with respondents provided relevant information and added meaning to the statistical data.

CHAPTER IV

RESULTS

The results of this project are presented in four sections. In the first section, similarities and differences between the two samples are evaluated. The next two sections are dedicated to the two hypotheses. The final section contains an appraisal of exchange theory as used in this study, and a comparison with the alternative approaches of activity and disengagement theories.

Similarities and Differences Between Samples

When the samples were selected, it was decided to group separately people who had retired recently and those who had been retired for a longer period of time in order to control for differences due to adjustment to retirement. Before discussing the major hypothesis, it was decided to proceed with analysis regarding significant differences between groups, and to evaluate possible effects of adjustment to retirement. The analysis included two different steps: first, t-tests were computed to compare means between the two groups; and secondly, data for the two groups were crosstabulated to observe the joint distribution of each variable by group, and chi-square statistics were calculated to determine whether a systematic relationship existed between each variable and group.

Analysis of data indicated that few significant differences between the two samples existed, and of those that were found, some

were to be expected due to sampling procedures. The most significant difference was age: the mean age of the group retired earlier was 66.55; while for the group retired later it was 62.30 ($t=-5.55$; $p<.001$). Even though the difference is statistically significant, it only reflects the decision to select two subsamples of respondents at different stages of retirement. The other major statistically significant difference was in the amount of advice or help currently requested by family and friends of respondents in comparison with the past. People who retired in 1978 reported to have a decreased request for help and advice in comparison with the past, while people who retired in 1973 reported an increased request for help and advice when compared to the past ($t=-3.82$; $p<.001$). Since the pattern of variability for the two groups was not significant in other areas related to possession of special skills, education or prestige, it appears that the difference could just reflect a diminished interaction of people who had retired recently and their process of adjusting to it. The finding is consistent with the difference in the amount of advice given at the time of the interview between the two groups. Although not significant statistically, there was a difference: people just retired had fewer requests for help than people who had retired earlier ($t=1.87$; $p=.07$).

Other areas of differences included satisfaction with present financial situation ($M_1=3.9$; $M_2=4.55$; $p=.008$); ability to contribute financially to solve family problems ($M_1=.85$; $M_2=1.00$; $p=.07$); difference in amount of help received from others in the last ten years ($M_1=1.05$; $M_2=.09$; $p=.08$); and willingness to ask for help in case of need ($M_1=1.6$; $M_2=2.3$; $p=.06$). It appears that people who had retired more recently were: less satisfied with their financial

situation; believed that they were less able to help their family in financial matters; noticed a decrease in the amount of help received from family and friends (while the group retired earlier noticed a slight increase); and were less favorably disposed toward receiving help in case of need.

Although caution is required in view of the levels of significance and of the sample size, the findings appear to suggest that people who had retired recently exhibited a higher degree of concern toward financial matters than those who had retired earlier. Such concern does not necessarily imply a real difference in economic status between the two subsamples (if such were the case, other indicators, such as concern for inflation or ability to meet future rises in prices, would have produced significant scores); it probably demonstrates only a certain degree of anxiety toward a new phase in life. The respondents who had been retired for a longer period of time have had ample opportunity to prove to themselves that they can survive economically on reduced income.

The second part of the analysis consisted in crosstabulating data for the two groups and computing chi-square statistics. Findings were basically consistent with t-test results. Age, satisfaction with present financial situation, and difference in request for help and advice from family and friends in comparison with the past had significantly different distributions for the two groups, and presented the same characteristics already discussed in the section dealing with the t-test. The distributions for the remaining variables indicate that no statistically significant relationships existed between the two samples, or that (as in the case of age), the statistically

significant relationship had no substantive importance.

The existing differences appear to indicate that, even though the respondents denied the fact emphatically, retirement might indeed be a problematic experience requiring a process of adaptation. The relevance of the findings in this study, however, rests not on the few significant differences, but rather on the lack of them. Significant differences in terms of health or financial status between the two subsamples would have been justifiable or even expected. The fact that variation in time of retirement had minor or no effect on most variables could be a major finding in itself, although it must be remembered that a selection process might have been working in the case of the 1973 subsample, whereby only the most successful (surviving) respondents had the opportunity of being interviewed.

Hypothesis 1

The major hypothesis of this study investigates the relationship between social resources and social contexts of the elderly and their life satisfaction. In order to determine the significance and the strength of the relationship between variables, Pearson correlation and eta coefficients were computed. In addition, scales were constructed in order to further validate the meaning and importance of the correlations.

The next section is dedicated to the examination of the content of each scale and correlation with LSIA, and to the analysis of items which, although not included in the scales, presented relevant and significant correlations with life satisfaction. Twelve scales, generated by the questionnaire, measured the following dimensions of

life satisfaction:

1. INFORMAL SOCIAL SUPPORT, or informal social interaction, a five-item additive scale, measured interaction with the family and included items such as ease of relating to children, frequency of relating to children, frequency of relating to grandchildren, satisfaction of relating to children, and general supportive ability of the family (Table II).

2. FORMAL SOCIAL SUPPORT, or formal interaction, a four-item additive scale, measured interaction with formal organizations. Items included questions such as the number of organizations the respondents belonged to, amount of energy and time invested in the organizations, money invested in the organization, and satisfaction derived from the organization (Table III).

3. HEALTH, a three-item additive scale, measured items like present self-rated health, past self-rated health, and ability to perform physical work (Table IV).

4. HOUSING, a two-item additive scale, measured housing resources, included items like housing convenience and housing stability (Table V).

5. TRANSPORTATION, a two-item additive scale, measuring mobility resources and included items like mobility patterns and concerns regarding mobility and transportation safety (Table VI).

6. FINANCIAL ADEQUACY, or wealth as defined by Blau, or solvency as defined by Gubrium, a four-item additive scale, included items such as attitudes toward cost increases, resources to deal with cost increases, ability to give financial help to family, and satisfaction with the present financial situation (Table VII).

TABLE II

INTERCORRELATION OF ITEMS MEASURING INFORMAL SOCIAL SUPPORT

	Ease of Relating to Children	Frequency of Interaction with Children	Frequency of Interaction with Grandchildren	Satisfaction of Relating to Children	Family as a Supportive System
Ease of Relating to Children	1.000 (n=36)	.3623 .016*	.4513 .008*	.5269 .001*	.3411 .022*
Frequency of Interaction with Children		1.000 (n=36)	.3164 .047*	.1767 .151*	.0814 .309*
Frequency of Interaction with Grandchildren			1.000 (n=29)	.7864 .001*	.5876 .001*
Satisfaction of Relating to Children				1.000 (n=36)	.5154 .001*
Family as a Supportive System					1.000 (n=40)

*Significance level.

TABLE III

INTERCORRELATION OF ITEMS MEASURING FORMAL SOCIAL SUPPORT

	Number of Organiza- tions belonging to	Time and Energy in- vested in organizations	Money Invested in Organizations	Satisfaction Derived from Organizations
Number of Organizations Belonging to	1.000	.4347 .005*	.3004 .042*	.3711 .015*
Time and Energy Invested in the Organizations		1.000	.4962 .001*	.6847 .001*
Money Invested in the Organizations			1.000	.6590 .001*
Satisfaction Derived from Organizations				1.000

*Significance level.
n=34

TABLE IV
INTERCORRELATION OF ITEMS MEASURING HEALTH

	Present Self- Rated Health	Past Self- Rated Health	Ability to Perform Physical Work
Present Self- Rated Health	1.000	.6961 .001*	.7334 .001*
Past Self- Rated Health		1.000	.5498 .001*
Ability to Perform Physical Work			1.000

* Significance level.
n=40

TABLE V
INTERCORRELATION OF ITEMS MEASURING HOUSING

	Housing Convenience	Housing Stability
Housing Convenience	1.000	.3765 .008*
Housing Stability		1.000

*Significance level.
n=40

TABLE VI
INTERCORRELATION OF ITEMS MEASURING TRANSPORTATION

	Frequency of Mobility	Safety Concerns Regarding Mobility
Frequency of Mobility	1.000	.3241 .021*
Safety Concerns Regarding Mobility		1.000

*Significance level.
n=40

TABLE VII

INTERCORRELATION OF ITEMS MEASURING FINANCIAL ADEQUACY

	Attitudes Toward Costs Increases	Resources to Deal with Costs Increases	Ability to Give Financial Help to Family	Satisfaction with Present Financial Situation
Attitudes Toward Costs Increases	1.000	.4249 .003*	.3832 .007*	.2245 .082*
Resources to Deal with Costs Increases		1.000	.2448 .064*	.3312 .018*
Ability to Give Financial Help to Family			1.000	.3213 .022*
Satisfaction with Present Financial Situation				1.000

*Significance level.
n = 40

7. FORMAL PRESTIGE, a three-item additive scale, included items measuring position with the company at the time of retirement, self-rated informal education, and level of formal education (Table VIII).

8. INFORMAL PRESTIGE, a three-item additive scale, measured patterns of relationships based on expertise or other special qualities. It included items like frequency of help given based on possession of special skills, frequency of requested advice, and frequency of given advice (Table IX).

9. OBLIGATION, a four-item additive scale, measured interaction patterns based on reciprocal obligations. Items included in the scale consisted of questions investigating the frequency of time, energy, and money spent to help family and friends (or received as help from family and friends). Help was given or received, based on feelings or expectations or obligations (Table X).

10. RECOGNITION and APPROVAL, a three-item additive scale, measured patterns of approval. The scale included items like the degree of approval requested by family and friends, and the degree of need for family's and friends' approval (Table XI).

11. POWER or DEPENDENCE, defined by Blau as the natural outcome of social exchange processes, was measured by a one-item scale. The item consisted of a question dealing with four alternatives in case of need: coercion to satisfy the need; inducement to convince others to satisfy the need; obtaining service from other sources; and denial of need, or resignation to forego the help or service.

12. SOCIAL CONTEXT, a three-item additive scale, measured the ability to deal with the social and physical environment. The scale included questions such as difficulty of adjusting to others'

TABLE VIII
INTERCORRELATION OF ITEMS MEASURING FORMAL PRESTIGE

	Position with the Company at the Time of Retirement	Self-Rated Informal Education	Formal Education
Position with the Company at the Time of Retirement	1.000	.2741 .044*	.6069 .001*
Self-Rated Informal Education		1.000	.3889 .007*
Formal Education			1.000

*Significance level.
n=40

TABLE IX
INTERCORRELATION OF ITEMS MEASURING INFORMAL PRESTIGE

	Frequency of Help Given Based on Possession of Special Skills	Frequency of Requested Advice	Frequency of Given Advice
Frequency of Help Given, Based on Possession of Special Skills	1.000	.4016 .005*	.5922 .001*
Frequency of Requested Advice		1.000	.1553 .169*
Frequency of Given Advice			1.000

*Significance level.
n=40

TABLE X

INTERCORRELATION OF ITEMS MEASURING OBLIGATION

	Frequency of Time and Energy Spent to Help Family and Friends	Frequency of Money Spent to Help Family And Friends	Frequency of Help Received in Terms of Time and Energy	Frequency of Help Received in Terms of Money
Frequency of Time and Energy Spent to Help Family and Friends	1.000	.4518 .002*	.4094 .004*	.4801 .001*
Frequency of Money Spent to Help Family and Friends		1.000	.3199 .022*	.2438 .065*
Frequency of Help Received in Terms of Time and Energy			1.000	.6972 .001*
Frequency of Help Received in Terms of Money				1.000

*Significance level.
n=40

TABLE XI
INTERCORRELATION OF ITEMS MEASURING RECOGNITION AND APPROVAL

	Degree of Approval Requested by Family and Friends	Degree of Need for Family's Approval	Degree of Need for Friends' Approval
Degree of Approval Requested by Family and Friends	1.000	.3052 .028*	.2331 .074*
Degree of Need for Family's Approval		1.000	.5900 .001*
Degree of Need for Friend's Approval			1.000

*Significance level.
n=40

TABLE XII
INTERCORRELATION OF ITEMS MEASURING SOCIAL CONTEXTS

	Difficulty in Adjusting to Others' Expectations	Ability to Deal with Problems of Everyday Life in Comparison with the Past	Ability to Keep House in Comparison with the Past
Difficulty in Adjusting to Others' Expectations	1.000	.3743 .009*	.2052 .102*
Ability to Deal with Problems of Everyday Life in Comparison with the Past		1.000	.4645 .001*
Ability to Keep House in Comparison with the Past			1.000

*Significance level.
n=40

expectations, ability to deal with problems of everyday life in comparison with the past, and ability to keep house in comparison with the past (Table XII).

Items from each of the twelve scales were standardized, added, averaged and subsequently correlated with life satisfaction (Table XIII).

Internal correlation of scales, correlations of scales with life satisfaction, and correlations of single items with life satisfaction will be discussed together in order to present a more complete and meaningful evaluation of the relationship between life satisfaction, social resources and social contexts. The presentation will not follow the sequence used to present the description of scales, where social supports were followed by resources (biological, material, and non-material factors) and by social context. Instead, indicators with highest correlations with life satisfaction will be presented first, and will be followed by indicators with lower and/or non-significant correlations.

A very definite positive relationship was found between the scale of financial adequacy and life satisfaction ($r=.4424$; $p=.002$). Other singular items of resources which correlated highly with life satisfaction were: satisfaction in financial matters ($r=.5201$; $p=.001$); ability to contribute to the solution of financial problems of the family ($r=.303$; $p=.026$); and life-style when compared to friends ($r=.3841$; $p=.007$). None of the respondents admitted receiving any kind of financial help from either family, friends or institutions; but two confessed to being very worried about the rapid increase in the cost of living, and ten others admitted to being somewhat worried. When asked what kind of solutions they were considering in order to

TABLE XIII
CORRELATION OF SCALES WITH LIFE SATISFACTION

SCALES	CORRELATION WITH LSIA
Informal Social Support	($r=.0869$)
Formal Social Support	($r=.0990$)
Health	($r=.2278$) $p=.07^*$
Housing	($r=.1033$)
Transportation	($r=.1664$)
Financial Adequacy	($r=.4424$) $p=.002^*$
Formal Prestige	($r=.4015$) $p=.005^*$
Informal Prestige	($r=.2395$) $p=.06^*$
Obligation	($r=.0105$)
Recognition and Approval	($r=.3958$) $p=.006^*$
Power	($r=.4411$) $p=.002^*$
Social Contexts	($r=.3307$) $p=.019^*$

*Significance level.

deal with the problems of inflation, seventeen indicated that they considered their income adequate and did not believe they would have to restrict their life-style. Of the other twenty-three, most indicated that they would have to withdraw funds from their savings; some said that "if things got really bad" they would sell their second house or second car. Three stated that they would take part-time jobs or would try to eliminate unnecessary expenses. One, a divorced woman, said she did not have any solution, and another (also a divorced woman) said that she would "rob Peter to give to Paul."

Although all respondents appeared to be able to meet basic expenses, there was a great difference in their life-styles (as observed by this interviewer) and in their outlook toward the future. It has already been mentioned that people who had retired recently gave evidence of a higher degree of concern toward the future. However, it appeared that the amount of resources available to deal with forthcoming contingencies was the crucial factor in determining satisfaction regarding present financial situation ($r=.3312$; $p=.01$) as well as attitude toward the future ($r=.4249$; $p=.003$).

These findings are not unexpected since they agree entirely with research on the subject. Edwards and Klemmack (1973) report income (in terms of reduction of resources) as the most important element affecting life satisfaction. Similar findings are presented by Spreitzer and Snyder (1974), Pfeiffer (1970), and Williams (1960). Accumulation of resources is considered to be one of the three elements determining status and quality of life of the elderly by Press and McKool (1972), who examined status of the aged in cross-cultural settings.

Scales of prestige also exhibited significant correlations with life satisfaction. When a correlation matrix of items dealing with prestige was constructed, it became evident that two different dimensions of prestige were being measured. The first included more formal elements such as formal education, position with the company at the time of retirement and self-rated informal education. The second included less formal elements such as frequency of advice requested and given and frequency of help given. Results indicate that a high correlation existed between life satisfaction and scale of formal prestige ($r=.4105$; $p=.005$), and that a correlation approaching significance existed between life satisfaction and informal prestige ($r=.2395$; $p=.06$). The most significant single item to correlate with life satisfaction was education ($r=.4086$; $p=.004$), followed by self-reported informal education ($r=.3675$; $p=.01$), frequency of help requested from family and friends ($r=.3185$; $p=.02$), and frequency of advice requested from family and friends ($r=.2963$; $p=.03$). However, the relationship between frequency of advice requested from family and friends and life satisfaction appeared to be curvilinear, as indicated by an eta value of .5120. Most people who had few requests for help exhibited low life satisfaction scores; most people who had "average" requests for help exhibited medium life satisfaction scores; and people with frequent requests for help reported high satisfaction scores. However, "very often" requests resulted in a slightly higher number of people with low life satisfaction. Results agree with research findings regarding the significance of prestige in morale and life satisfaction of the aged (Press and McKool, 1972; Williams, 1960; Martin, 1971).

Analysis of data also indicated that a positive significant relationship existed between life satisfaction and power over others' resources ($r=.4411$; $p=.002$). In addition to a significant correlation, analysis from cross-tabulation showed that, with two exceptions, all individuals who ranked "high" in life satisfaction felt confident enough to ask directly for help from family and friends in case of need and were sure that their requests would be satisfied (Table XIV).

TABLE XIV

RELATION BETWEEN POWER OR CONTROL OVER OTHERS'
RESOURCES AND LIFE SATISFACTION*

Power of Control Over Others' Resources	LIFE SATISFACTION			
	Low	Medium	High	Total
Denial of Need	4 (10%)	2 (5%)	2 (5%)	8 (20%)
Ask Alternate Source	2 (5%)	3 (7.5%)	0	5 (12.5%)
Inducement	3 (7.5%)	5 (12.5%)	0	8 (20%)
Coercion	4 (10%)	4 (10%)	11 (27.5%)	19 (47.5%)
Total	13 (32.5%)	14 (35%)	13 (32.5%)	

*Level of significance = .03.

Results are even more significant if the cases of the two respondents who ranked high in life satisfaction and low in ability to impose on others' resources are considered. One case involved a man who had recently suffered a major tragedy: a close member of his family was kidnapped, tortured, and murdered. In recounting the details he made

two comments: the event almost destroyed his family with sorrow and despair; and, he had no support from friends, acquaintances, or even members of his extended family. He explained that he understood that people probably did not know how to react or how to help him; but he claimed that, with his family, he "went through the ordeal in almost complete isolation." The second case concerned an elderly divorced woman who appeared satisfied with her life and with her relations with family and friends. She mentioned, however, that her husband had left her when her two children were still very small; that she "had to struggle in order to survive;" and that she "struggled along." It appears that the trying experiences of these two respondents, and the fact that they could not count on aid when they most needed it, had more to do with shaping their attitudes toward receiving any kind of help than did their present ability to obtain it.

In demonstrating the existence of a direct relationship between power over others' resources and life satisfaction, the data support the concept of power in positive terms: life satisfaction is affected not only by lack of power (resulting in low satisfaction), but by explicitly direct power (resulting in medium or high life satisfaction).

The next indicator or scale with strong impact on life satisfaction of the elderly was recognition and approval ($r=.3958$; $p=.006$). Other individual items with positive significant correlations were: self-evaluation of success ($r=.5303$; $p=.001$); and, degree of approval requested by family and friends ($r=.4226$; $p=.003$). However, in spite of evident and significant correlations, analysis of data revealed a wide difference of responses regarding success, suggesting that caution be exercised in the interpretation of recognition and approval.

When asked to evaluate how successful they had been in their lives, many respondents answered without delay, giving the impression that they understood clearly what was meant by "success." Several of the respondents, however, raised questions regarding the meaning of the term and, when encouraged, offered their own definitions. Some explained it as the position attained with the company, and others as satisfactory relations with the family. A few perceived success in explicit economic terms, and two respondents interpreted it as the ability to do what they wished with their lives, and on a day-to-day basis. The responses appear to signify that success is a multi-dimensional concept and, therefore, research dealing with recognition should consider both the different elements embraced by the term and their relative importance for the respondents, and, as suggested in the Chinoy study (1955), the rationalization process through which unsuccessful workers attempt to solve the disparity between goals and actual achievements.

A direct and significant correlation existed also between the scale of social contexts and life satisfaction ($r=.3307$; $p=.019$). Furthermore, correlations of items revealed that significant relationships existed between life satisfaction and: amount of problems experienced in the past ($r=.4145$; $p=.004$); impact of demanding activities on the participation of the respondents ($r=.3993$; $p=.005$); and feelings toward time (e.g., "passing by" too slowly or too rapidly) ($r=.6006$; $p=.001$). Marginal correlations were found between life satisfaction and: importance of others' expectation on one's life; and, difficulty in adjusting to others' expectations. The findings appear to support two major observations: first, the respondents gave

the impression of reacting more to personal factors and to elements dealing with the physical environment than with the social. Second, the majority of the respondents belonged to the category of people who did not decrease their participation in activities, did not experience more problems, and did not believe that time passed too slowly. In fact, twenty-five people did not decrease participation in activities, thirty-six experienced the same (or lesser) amounts of problems than ever before in their lives, and thirty-two believed that either they had no free time at all or that they were so busy they seldom had any free time. Such responses might help to clarify the non-significant correlations between life satisfaction and others' expectations.

It seems reasonable to assume that people with good financial resources, the ability to resolve their own problems and daily cares, and a spirit of independence did not concern themselves too much with expectations of others toward them. In this regard several of the respondents mentioned that their family and their children wished for them to "slow down" and not to engage in so many activities and travels but that it was up to them to make their own decisions.

From the analysis it can be determined that the correlations between life satisfaction and social contexts were based on positive data: the majority of the respondents were active, well-off financially and lead relatively trouble-free lives. Findings do not contradict research in the area: Gubrium (1973), and Berghorn, et al. (1978) reported on the effect of social contexts on life satisfaction; and Margaret Clark (1967) presented evidence that conflict in cultural and social contexts resulted in maladjustment and mental illness of elderly individuals.

A correlation approaching level of significance ($r=.2278$; $p=.07$) was found between the scale of health and life satisfaction. Similar correlations existed between life satisfaction and items life self-reported health ($r=.2199$; $p=.08$), and past health ($r=.2130$; $p=.09$). The results are not surprising in view of the consistently similar research findings. Palmore and Luikart (1972) found that the predominant variable influencing life satisfaction was self-rated health. Congruent results are reported by Edwards and Klemmack (1973), Spreitzer and Snyder (1974) and Pfeiffer (1970), who noted significant correlations between the two variables. Due to the limited range of the sample, (only eight respondents felt that they could not exert themselves too much, but indicated that they could still work) the resulting correlations indicate that a relationship does exist between life satisfaction and perceived health.

It has already been stated that the respondents represented a rather privileged group of people, since none of them had severe restrictions regarding health. However, just from the data it is not possible to see if people were healthy, or just optimistic regarding their health. From conversations, this researcher received the impression that the latter was the case. Several of the people interviewed indicated that they had undergone surgery recently, and were still recuperating, but had planned to resume their regular schedule as soon as possible. In at least a couple of cases (open heart surgery and cancer treatment) such beliefs appeared somewhat unrealistic. It seems unfair, however, to attribute to optimism a position that had probably more to do with strength of character, and maybe a bit of pioneering spirit. Such a posture was evident from the comments of the

respondents: one of them made a remark in this regard that "it just takes a little longer and I get a bit more tired, but I still get the work done." Another said (pointing at his wife), "Well, Mama helps me a lot now...but between the two of us...the things get done." It seems that as long as they could cope with the situation, the respondents tended to perceive their health as adequate or at least non-problematic.

Self-perceived health is the last indicator for which significant correlations were obtained in this study. The following indicators were found to have non-significant correlations with regard to life satisfaction.

The correlation obtained between the scale of transportation and life satisfaction was .1033. This finding is justifiable, however, in view of: first, all but one of the respondents had at least one car, and the one who did not indicated that not owning an automobile was a personal decision and preferential in her case; and second, all respondents considered themselves conveniently located in terms of their proximity to shopping, medical and other service areas. The low correlation does not contradict research findings. Lawton (1977) suggests that the lack of transportation as a link to other resources (rather than transportation itself) is the factor influencing life satisfaction.

A non-significant correlation of .1033 was found between the scale of housing and life satisfaction; such a weak relationship remained constant with individual items as well. The only significant relationships existed between life satisfaction and: housing satisfaction ($r=.3755$; $p=.008$); neighborhood satisfaction ($r=.4561$; $p=.002$); and satisfactory relations with neighbors ($r=.4253$; $p=.003$). Such

findings appear to agree with Carp's statement (1976) that "characteristics of the neighborhood rather than those of the dwelling units may be decisive in determining satisfaction with housing." Nevertheless, even in view of positive and significant correlations, caution should be used before accepting results in view of the following: first, all of the respondents (or at least thirty-six, or ninety percent of them) lived in very comfortable, nicely decorated homes. The few of them who did not have spotless new carpets or manicured yards appeared to be the kind of people who preferred to put their money and efforts in things other than their house. None of the houses visited were substandard and, in fact, some of them were extremely nice and demonstrated the expensive and sophisticated tastes of their owners (in one case this included Carrara marble floors from Italy and authentic 17th Century Chinese furniture). Several of the respondents also indicated having a second house at the beach, or in other resort areas, and one had three houses, two of which he was renting. The findings indicate that the respondents do not match national studies on housing, according to which "one of every five elderly persons lives in substandard housing, that is, a unit which lacks basic plumbing facilities" (Carp, 1976).

The second factor, which has complicated the study on this particular aspect of life satisfaction and has rendered problematic the interpretation, has been the consistent positive evaluations made by the respondents regarding their houses. They all indicated they were mostly or very satisfied, and rated their houses as very or mostly convenient in relation to distance from shopping, medical, and other service areas. Such favorable evaluations did not appear at all

evident to this researcher, who visited most of the respondents in their homes, and had the opportunity to observe different degrees of convenience.

With regard to this, Carp (1976) presents evidence that verbal evaluations of older people regarding housing lack validity. Several favorable assessments of residences of elderly were rated as poor by investigators. The researchers observed that the unrealistic evaluations of the respondents had more to do with "defense mechanisms" than with distorted perception. It is possible that the same factors might have affected this research; therefore, findings should be viewed with caution.

Although unrealistic evaluations most likely had no influence in measuring formal social supports, the correlation between the scale of formal social support and life satisfaction remains non-significant. Non-significant also are the correlations of life satisfaction and items such as: number of organizations belonged to; position occupied; money, time, and energy invested in organizations; satisfaction derived from belonging to organizations; and recent changes in investments or benefits from organizations. Results are clearly antithetic with several research projects in the area. Palmore and Luikart (1972) indicated organizational activity as a major important variable related to life satisfaction (even though the reported correlation was .18). Graney (1975) also reported activities in voluntary associations to be significantly related to life satisfaction. Other authors point out that participation in voluntary associations is more related to sex and social class than it is to age, and that evidence is ambiguous whether major life changes (such as retirement) influence participation in

voluntary organizations (Lowenthal and Robinson, 1976). Although some studies indicate that change among aged is related to decreased involvement, others suggest that direct participation in voluntary associations in old age depends mainly on styles established earlier in life. Susan Sherman (1974) believed that studies regarding organizational involvement should consider pre-levels of participation of people. She also noted that raw scores of organizational activities do not adequately reflect the importance or meaningfulness of the involvement.

The data suggest that there was a consistency of membership in organizations for the respondents. In the last ten years only four members dropped membership in some association; the remaining thirty-six maintained a constant level of membership, although not the same level of leadership. When the total level of involvement was considered, however, fifteen people expressed that they had reduced the amount of money and energy spent in organizations, nine had increased it, and thirteen felt there was no change.

Lack of significant correlations was also the case between informal social supports and life satisfaction ($r=.0869$), and the relationship remained constant (i.e., non-significant) when separate items were considered. Factors like number of children, frequency of relation with children, ease of relation with children, satisfaction of relating to children, living near children, number of grandchildren, and frequency of visits with grandchildren appeared to have no impact on life satisfaction. Similarly, marital status and years of marriage, although positively correlated, had no statistically significant relationship. The only questions with significant correlations were: frequency of relation with relatives ($r=.3194$; $p=.02$); and satisfaction

of relating to friends ($r=.4033$; $p=.005$).

These results are not easy to assess in view of the fact that most of the respondents with children demonstrated positive feelings and talked of them in proud terms. Such feelings are reflected in the statistical data. For example, satisfaction with children is highly correlated with ease of relating to children ($r=.5269$; $p=.001$), and with belonging to a family where members support each other in case of need ($r=.5154$; $p=.001$).

One possible explanation for the low correlations could be the restricted range of the samples. In fact, only two out of thirty-six respondents with children indicated they were not satisfied with their relations with one or more of their children. The other thirty-four stated that they were either adequately or highly satisfied. Another reason might be related to the suggestion by Gubrium (1973) that social supports are significant only when they display continuity. The individual who suffers discontinuity in social supports will have difficulties in coping with the environment and, therefore, his/her morale will suffer. However, to have such social supports does not necessarily imply high morale. Although some sources (Medley, 1976; Pfeiffer, 1970) report that close family relations are associated with life satisfaction, others (Scott and Brewer), 1971; Sussman, 1976) indicate that research in the area has suffered theoretical biases, like the myths of "nuclear family" and "isolated elderly."

Ethical standards have repeatedly influenced information regarding interaction between generations, and "research into the many dimensions that make up the bundle called 'family relations' still lies ahead" (Scott and Brewer, 1971). Sussman (1976) reports that in spite of the

large amount of research, there is "a lack of consensus on defining or describing family."

It has also been suggested that one has no choice regarding his/her relations with children, while such choice does exist for relatives and friends. This, and the fact that expectations for children are higher than for relatives or friends, can help to explain why the correlation of life satisfaction with satisfaction of relating to children is not significant, while it is much higher for satisfaction of relating with friends, or frequency of interaction with relatives. The ability to "choose" the person with whom one feels comfortable is probably indirectly related also to the significant correlation between life satisfaction and the availability of a person "to share things with" ($r=.6426$; $p=.001$).

Finally, the correlation between life satisfaction and scale of obligation also resulted in a low level of significance ($r=.0105$; $p=.470$). The relationship remained constant (i.e., low) when items of obligation were separately correlated with life satisfaction, with the exception of help and support from family ($r=.3394$; $p=.01$), where a significant degree of association existed between the two variables. The fact that obligations in general were not correlated with life satisfaction appears to indicate that they represent a problematic type of exchange relations. Such possibility was recognized and discussed at length by Blau (1964). He suggested that a situation in which the actions that reward a person and that are experienced by the giver as a net gain instead of a cost is rather rare. To explain the case, Blau presented as an example the situation in which a neighbor enjoys chopping wood and another wants his wood chopped. However, in

most instances transactions are perceived as not perfectly balanced and therefore either partner might feel obligated to supply additional favors. Blau listed several reasons why exchange of obligations is problematic, which included social contexts, normative pressure to conform to the prevailing rate of exchange and laws of supply and demand. The low correlations between life satisfaction and obligations raise questions regarding the impact that differential status and normative pressure might have on the partners and on the transaction, and they suggest that such factors should be taken into consideration in the analysis of obligation and life satisfaction.

Findings from data tend to substantiate the problematic nature of obligations and the impact of differential status and of normative pressure on the transactions. A high correlation existed between amount of support given and belief that such support was demanding of them ($r=.4154$; $p=.004$), and between amount of support received and belief that such help did not constitute a problem for the giver ($r=.7534$; $p=.001$). Even acknowledging the fact that in this project people who gave the help are not the ones who received it (and therefore, discrepancy of evaluations is not necessarily relevant), and that some defensive mechanism might have been operating in both cases, the correlations still point out a possible significant difference of norms and perceived status and the need for further investigation on the subject.

At this point it seems important to stress that since the nature of this study is clearly exploratory and the analyses presented attempt only to address the possible correlates of life satisfaction in terms of social exchange processes, relevance of the findings depends on further investigation especially on the subjects of power, recognition,

prestige, and obligation.

In conclusion, analysis of data supports only partially the hypothesis that life satisfaction of the elderly is positively correlated to social resources and social contexts. Health, financial resources, formal and informal prestige, recognition and approval, control over others' resources, and social contexts presented significant correlations with life satisfaction. However, no relevant relationships existed between life satisfaction and formal and informal social supports, housing resources, transportation resources, and obligation.

It has already been noted that each of the correlations in the cases of housing and transportation resources might be related either to sample characteristics (such as restricted range) or to the fact that life satisfaction could be affected by the lack or inadequacy of housing and transportation resources more than by their efficiency and/or satisfactory supply.

It has also been suggested that lack of correlations for relations with family or informal relations might be due to the restricted sample range, the significance of the discontinuity vs. the continuity of social supports, the missing element of choice in the association or the inadequate formulation of concepts regarding family relations.

The lack of agreement in the literature regarding formal social supports did not facilitate an interpretation of the marginal correlations in this area. However, the possibility that either retirement or patterns established earlier in life could determine organizational involvement would help to explain the non-significant correlations between the two variables.

Finally, the perplexing mixture of positive and negative correlations between obligation and life satisfaction suggests that exchange of obligations are problematic and affected by normative pressure and/or status of the respondents. Such aspects should be included and evaluated in any research dealing with obligation and life satisfaction before a conclusive remark concerning their relationships is attempted.

Hypothesis 2

The second hypothesis of this research investigates the relationships between life satisfaction and change of social resources and social context. This researcher is aware that change is best observed and evaluated in longitudinal studies; however, the possibility did not exist in this case. Change was therefore appraised and measured by asking direct questions of the respondents.

Another major problem facing this part of the study was related to the size of the questionnaire. It would have been appropriate to match each item dealing with social support, social resources, and social context with a corresponding item dealing with change in social support, social resources, and social context; however, two considerations were instrumental in deciding to reject this approach. One reason, already referred to, was that it would not have been feasible or even advantageous to make the questionnaire any longer. The other reason is related to the "recall effect." Even though most questions dealing with the past are affected by memory failure or distortion, some aspects of life are recalled more easily and accurately than others. Most people would probably remember details and facts of

their wedding day better than they would facts or details of their 13th or 17th wedding anniversary. It was therefore decided to measure change by asking only a few selective questions dealing with effects of retirement or activities, difference in the rate of participation in social activities, ability to keep house and to deal with problems of everyday life, financial stability, and amount of help and advice presently requested by friends and family in comparison with the past. The questions were standardized, recoded in order to measure positive and negative changes, and subsequently added and correlated with life satisfaction.

The results indicated that a positive relationship existed between favorable change and life satisfaction ($r=.5581$; $p=.001$). When change was analyzed in detail (Table XV), it appeared that the greatest correlation, or the element with the greatest impact on life satisfaction, was the effect of problems of everyday life in comparison with the past ($r=.4146$; $p=.004$). The other items, in ranking order, were: ability to participate in activities (considering their demanding nature) ($r=.3993$; $p=.005$); change in financial status ($r=.3906$; $p=.010$); and amount of help and advice presently requested by family and friends in comparison with the past ($r=.3065$; $p=.027$). Items with no significant relationship to life satisfaction were: present ability to keep house when compared with the past; and advice requested by family and friends when compared with the past. However, in terms of the sample, it is important to note that: only nine respondents were less active than their pre-retirement days; only five noticed a great deal or a moderate amount of reduced participation; only four found that they faced more problems in life than in the past; six believed that their financial

TABLE XV
CORRELATIONS OF CHANGE IN SOCIAL RESOURCES AND SOCIAL
CONTEXTS WITH LIFE SATISFACTION*

Description of Items	Correlations	Level of Significance
Ability to cope with problems of everyday life in comparison with the past	.4146	.004
Ability to participate in activities (in view of their demanding nature)	.3993	.005
Change in financial status in the last ten years	.3906	.001
Involvement in activities, compared to pre-retirement levels	.3667	.01
Amount of help and advice presently asked by family and friends in comparison with the past	.3065	.02
Ability to keep house in comparison with the past	-.1542	.17
Advice asked by family and friends in comparison with the past	.1480	.18

*Correlation of total changes with LSIA = .5581; $p = .001$.

situation had deteriorated; ten believed it was easier to keep house in the past; ten felt that advice from them was requested more often in the past; and eleven felt their advice and help were requested more often in the past.

As was the case with social context, it can be observed that the number of respondents affected by unfavorable change was much less than the number who experienced either no change or favorable change.

In conclusion, analysis of data supports the hypothesis that life satisfaction is correlated with change in social resources and social

context. The finding agrees with similar research in the literature of aging (Butler and Lewis, 1973; Gubrium, 1973; Bengtson, Kasschau and Ragan, 1977; and Baltes and Willis, 1977).

Two major qualifications, however, should be noted in regard to the study. The "study of change" in this research has not been accompanied by the "study of continuity" advocated by Neugarten (1977), and consequently, has not explored long-term personality changes. Furthermore the study has not addressed the problem of relativity of change (e.g., the millionaire who has lost a million in the stock market is probably less affected than the poor old widow who has lost her social security check for the month), nor the problem of examining the relation among factors of change.

Therefore, although the analysis of data demonstrated that a relationship exists between change and life satisfaction, it has not provided an insight regarding the relative importance of factors of change, nor regarding the "long-term personality changes." It is hoped and recommended that a more comprehensive approach be used in future research dealing with change and life satisfaction of the elderly.

Social Exchange vs. Activity and Disengagement

Analysis of data regarding this project has led to the following conclusions: Hypothesis 1 has been partially supported and Hypothesis 2 has been entirely supported, demonstrating thereby the validity of exchange theory as an approach to the study of life satisfaction of the elderly. However, these results alone do not provide a complete assessment of the approach used, nor do they clarify its validity in comparison to the alternative approaches of activity and disengagement.

This section will therefore briefly discuss the intrinsic merits and shortcomings of exchange theory, as it was used for this project, and will review the data from the perspective of activity and disengagement in order to provide a basis for comparison.

The decision to apply exchange theory to this study of aging was based on the following rationale: first, in introducing a distinction between dyadic and generalized exchange and between intrinsic (informal) and extrinsic (formal) relations, it offered a flexible framework for the analysis of the process of interaction; second, in incorporating the analysis of resources it allowed the examination of their effects in the process; and finally, in acknowledging the implications of social contexts (i.e., expectations), it permitted the subjective evaluations of the respondents to be included in the evaluations.

Analysis of data has indicated that exchange theory is both a possible and an effective approach to the study of life satisfaction of the elderly. It has also provided evidence of the soundness and validity of the principle of distributive justice operating in social interaction processes.

Internal correlations of scale of informal prestige (Table IX) indicate that people who give help and advice are also the ones who receive advice ($r=.4016$; $p=.005$). Similarly, in the case of recognition and approval (Table XI), people who ask for family approval are also the ones who are asked for approval by family ($r=.3052$; $p=.028$); and in the case of obligation (Table X), people who spend time and effort to help family and friends are also the ones who receive help from family and friends both in financial terms ($r=.4801$; $p=.001$) and in terms of time and energy ($r=.4094$; $p=.004$). Finally, with regard

to formal social interaction (Table III), it appears that people who derive benefits or satisfaction from formal organizations are also the ones who invest time and energy ($r=.6847$; $p=.001$) and who invest money ($r=.6590$; $p=.001$) in such organizations. The significant correlations manifest that there is a correspondence between costs and rewards in the exchange process, and that the principle of fair exchange appears to be effective in the context of this study.

In addition, analysis of data seems to also support the application of the economic principles of costs and rewards to the interaction process. The significant correlations between life satisfaction and request for advice and help by family and friends of the respondents ($r=.3185$; $p=.023$), and the need of friends and family for approval of the respondents ($r=.4226$; $p=.003$), could indicate that such actions constitute a favorable exchange for the respondents; likewise, the low correlations between life satisfaction and need for advice from family and friends ($r=.0637$), need for family approval ($r=-.0505$), and need for friends' approval ($r=-.0928$), could signify that such actions imply a less favorable or a non-favorable exchange for the respondents.

However, the application of exchange theory to this study of aging has not been without shortcomings and deficiencies. Exchange theory, as used in this research, has pointed out that obligations are perplexing elements of the exchange process. A more complete analysis including differential status and normative pressure seems necessary in order to clarify the nature of social obligations and their impact on social transactions. Further research seems warranted also in the case of success and recognition in view of their multi-dimensional character. Conceptualization and operationalization of social supports, housing

and transportation need to be improved as well to investigate resources more satisfactorily. Finally, it must be recognized that the elements of cost and reward need to be addressed in a more complete manner than has been done in this research, and that the impact that indicators of life satisfaction have on each other needs to be measured.

Nevertheless, the acknowledgement that there is room for improvement should not overshadow the evidence indicating that exchange theory is a valuable tool for the study of aging.

The evaluation of exchange theory was followed by analysis of data from the perspective of activity theory. As stated in the previous sections, it has been found that activities in terms of social contexts are significantly related to life satisfaction of the elderly. The correlations indicated that the ability of the aged to spend their time and energy as they wished had great consequence for their morale. Analysis of data suggested also that life satisfaction was higher for people who were more active after retirement, and that the majority of respondents belonged in that category. However, discrepancies emerged when quality and quantity of activities were examined. Included in the questionnaire was a comprehensive list of different types of activities and the amount of time dedicated to each activity. When data were analyzed, correlations were computed for life satisfaction and: total number of activities the respondents engaged in; amount of time spent in activities; amount of new activities in the last ten years; and loss of activities during the same time.

The correlations were non-significant in all of the above, the highest correlation obtained was between amount of new activities in

the last ten years and life satisfaction ($r=.1696$), and it did not even approach the level of significance. Therefore, findings suggest that no relationship exists between raw scores of activities or amount of time spent on activities and life satisfaction. When type of activity was correlated with life satisfaction, findings showed that certain activities appeared to be more meaningful than others in terms of morale.

Correlations approaching significance resulted between life satisfaction and: amount of time spent working in the garden ($r=.2920$; $p=.03$); frequency of visits to family members ($r=.2544$; $p=.059$); and frequency of trips lasting more than one day away from home ($r=.2563$; $p=.055$). An inverse relationship was found between life satisfaction and frequency of volunteer work ($r=-.2901$; $p=.035$). Since the level of significance is rather low, it does not seem wise to attribute much importance to the findings, even though the correlations appear to underline plausible relationships between life satisfaction and: financial position (e.g., ability to travel); family relations; and maybe health (in terms of physical capacity to work). The inverse relation between life satisfaction and volunteer work could also be explained in terms of lack of alternatives either financial or family relations.

However, more meaningful than the particular correlations is the absence of significant correlations; it suggests that no type of activity or amount of activity is helpful in explaining life satisfaction. The significant correlations regarding context of activities indicate that expectations, and personal expectations in particular, are the most important factors regarding life satisfaction.

From analysis of data it can be concluded that activities alone do not help to explain life satisfaction among the elderly, and therefore the validity of activity theory as an approach to research in the area is questionable.

The other alternative to exchange theory to be briefly analyzed in this section, is disengagement. According to the statement by Cumming and Henry, already reported in the second chapter of this study, two factors help to explain the aging process. First, there is a decrease or a relinquishing of roles and activities, and second, the process is a satisfactory one. Analysis of data indicate that, in terms of relations with close family, respondents described them as frequent and as satisfactory (with two exceptions). However, neither frequency nor quality of relations with children had any impact on life satisfaction (as demonstrated by non-significant correlations). Data clearly did not indicate lack or decrease of relationships with children, although the respondents described that the relationships had evolved and were much different than what they were when their children were younger.

In terms of work role, it must be recognized that, since all the respondents were retired and the majority had not gone back to work, the statement of relinquishing "a" role must be accepted. However, as stated earlier, in some cases the relinquishing was voluntary, in others it was forced. Life satisfaction, however, was not affected by voluntary or compulsory retirement, as indicated by the lack of significant correlations. Life satisfaction was not affected either by the willingness of the respondents to go back to work. In fact, the overwhelming majority of them, who did not wish to ever return to work

(twenty-eight), added to the number who did not care (six), suggests that the concept of role loss did not fit the subsamples at all.

Finally, regarding their "supposed" withdrawal from society, data showed that only nine respondents were less engaged after retirement, and health was given as a reason in seven of the nine cases. When asked if they felt that retirement had altered their relations with people, twenty-five of the respondents answered negatively. Of those who answered positively, thirteen stated that they were submerged by invitations of all kinds, and by requests for help by their families and by charitable organizations. Their typical comment was "Now, since they know that I do not work, they all come to ask help for all kinds of things...I am busier now than I was before I retired..."

In summary, it appears that the respondents were not experiencing a loss or a decrease of interaction with society. In fact, with the few exceptions due to illness, the contrary was occurring: people were more active after retirement than before, and enjoyed their level of activities.

In conclusion, disengagement does not appear to provide a realistic description for the respondents in this study, nor does it help explain life satisfaction. It appears, therefore, that analysis of data not only supports the use of exchange theory as a valuable tool of research in the field of aging, but it offers a more valid explanation of life satisfaction of the elderly than do the alternative theories of disengagement and activity.

CHAPTER V

REVIEW OF THE FINDINGS AND IMPLICATIONS FOR FUTURE RESEARCH

The intent of this research has been to investigate the relationships between social resources, social context and life satisfaction of the aged, using exchange theory as a theoretical framework.

A theoretical and an ideological concern contributed to the intent and formulation of this research. The theoretical concern was stimulated by the prevalent empirical nature of existing research and the lack of an adequate theoretical perspective in the field of social gerontology. The ideological concern derived from the bias observed in the field resulting from the concentration of time and effort to the study of financially deprived aged individuals. This researcher believes that the overwhelming interest in underprivileged elderly, a concern worthy of praise in many aspects, has nevertheless been responsible for developing and molding a stereotype of the aged as dependent, derelict, downcast, and discontented human beings. This research was therefore conducted to test exchange theory as a new and valid approach to the study of aging, while at the same time focusing analytical attention on a sample consisting of individuals of varied socioeconomic background.

Analysis of data confirmed social exchange theory as a valid approach in the field of social gerontology and as a preferential alternative to disengagement and activity theories. Analysis of data

also furnished evidence to partially support Hypothesis 1 regarding the impact of social resources and social context on life satisfaction of the aged. Health, financial resources, formal and informal prestige, recognition and approval, control over others' resources and social context appeared to have significant relationships with life satisfaction, while no relevant relationships were found between life satisfaction and formal and informal supports, housing resources, transportation resources and obligation. Furthermore, findings from data supported Hypothesis 2 concerning the effects of change of resources and social context on life satisfaction of the aged.

In addition to proving the validity of exchange theory and to providing evidence to support the hypotheses, analysis of data indicated that the samples investigated were composed of respondents who clearly belonged to a special category: the "young-old." Neugarten (1977) suggested that life periods, such as infancy, adulthood and old age, clearly recognized in traditional societies, are becoming more and more differentiated in modern Western societies. The seventeenth and eighteenth centuries saw the emergence of the concept of childhood; the late nineteenth century witnessed the recognition of adolescence; and the twentieth century observed the acceptance of "youth" as transition periods into adulthood. In recent decades the new stage of "middle-age" has been acknowledged and described as a period in which, with children growing up and leaving home, parents have decreased their responsibilities while still retaining their work roles. Recently, a distinction between the "young-old" and the "old-old" has been proposed, with the former signifying a post-retirement period in which there is a continuing physical vigor, new leisure time, and new opportunities

for service to the community as well as for educational and recreational opportunities for self-fulfillment" (Neugarten, 1977). This statement appears to be a rather accurate description of the samples investigated, and an implicit acknowledgement of the phenomena of increased longevity and historical changes in the life periods of people.

The other major insight provided by the analysis involves the socioeconomic status of the respondents. It was believed, in the early stage of this research, that in selecting a random sample from a large corporation it would be possible to obtain respondents with different economic, educational, and professional backgrounds. The goal was only partially accomplished since the range concerning economic factors was much more restricted than the range concerning educational or professional factors. It appears that the stability of continuous work for a large company or corporation might have helped to reduce differences. In fact, several of the unskilled and skilled blue collar workers and clerks mentioned that their salaries were quite good, and that emergency situations (lasting up to several months), during which they had had to work extra hours or "double shifts," provided very profitable overtime payments for them. The situation seldom existed for management people, who were generally expected to work as long as necessary without extra compensation. Just observing their houses, it was impossible for this researcher to successfully guess the position of the respondents with the company.

The economic implications of differences between year-round full-time employment versus other kinds of employment have been investigated by Harold Sheppard (1976). He suggests that full-time employment produces a privileged strata of people in comparison with the rest of

the population, with the greatest contrast observable in the group aged 65 years and older. The impression gained from this research was that middle and lower level workers for the company not only appeared to be better off than their counterparts in society, but that their life-styles appeared quite similar to those of higher level employees or managers of the company. The questions raised from the study in this regard are: what is the effect of continued work with a large company on the financial status of individuals if compared to the rest of society? Is there any actual restriction of range in economic terms for people working for the same company?

Other major questions brought to consideration by this study, and briefly mentioned in the previous chapter, are directly related to the analysis of data. Evaluation of data regarding retirement indicated that no major difference existed in the two samples investigated. It appears reasonable to assume, however, that by increasing the difference in time of retirement, more changes could be observed. Stated differently, when and in what manner are changes detectable for people who had retired at different times? Are those changes peculiar to persons retiring from a specific type of company or do they resemble the changes which occur among the rest of the elderly? The significant relations between retirement and anxiety toward financial matters and "deteriorated" prestige have also brought to attention the need for further investigation into the process of retirement. Even though most people stated that they did not note any change, the higher concern for money and for prestige of the group which retired more recently appears to indicate that retirement is in fact a problematic

process and one that requires more adjusting than the respondents were willing to concede.

The analysis of data regarding social support and housing and transportation raised two more questions. The first concerns the importance of continuity versus discontinuity of resources, such as the relative effects on life satisfaction of continued and adequate availability of resources versus a decrease or an interruption of them. The second question deals with respondents' evaluations of their houses, their neighborhoods, and the quality of relations with their close family. Very few indicated dissatisfaction, but, even without doubting their honesty, it appears reasonable to assume that there was justifiable reluctance in admitting unsatisfactory relations with their family or inconvenient housing or transportation. There appear to be at least two major tasks for future research: to reassess the concepts of housing, transportation and family relations; and, to identify methods to measure factors affecting life satisfaction, without arousing anxiety or defense mechanisms in the respondents.

Another problematic issue of this study concerns self-evaluation of health. Maddox and Douglass (1973) investigated the relationship between self and physicians' assessment of health status and found persistent congruence of the types of health ratings. However, in cases of incongruity, they reported that the tendency was for the individual to overestimate his/her health. The tendency was also observed with the respondents in this project, and the impression derived was not so much a process of denial as an eagerness to overcome the problem. It appears that whether the overestimation of health status is associated with certain personality traits is a question

worth pursuing.

A different issue was unfolded in the analysis of data with regard to prestige and success. Both quantitative and qualitative data indicated that prestige and success are multidimensional concepts and that a discrepancy might exist between self and others' evaluations. It is therefore suggested that the different aspects of prestige and success, their relative importance for the individual, their impact on life satisfaction and the correspondence between self and others' evaluations are interesting topics for further research.

Correspondence of evaluation is an area of significance concerning not only prestige and success, but obligation as well. Data indicated that there might be a discrepancy of evaluation regarding the cost of help given and the value of help received. Blau (1964) suggested that obligations are problematic types of exchange due to factors such as normative pressure, differential status and need to conform to prevailing rates of exchange. The discrepancy revealed by data analysis regarding the perceptions of exchange rates does not agree entirely with Blau's position, even though it suggests that obligations are indeed a problematic and not sufficiently investigated topic.

A provocative question was raised in relation to power: are previous life experiences a determining factor in the willingness to command or use others' resources? Qualitative data indicated that prior negative experiences might have resulted in reluctance to depend upon others even in case of emergencies or major problems. Therefore, a major implication for further study would be to specifically identify the factors involved in the decision to use others' resources.

Finally, regarding impact of social context on life satisfaction, analysis of data directed attention to the relationship between personal context and social context. In the samples investigated, the respondents appeared to be affected by personal more than by social context. It would be of interest to examine the relationships between social resources and personal context, and between these two and social context. Stated differently: what is the impact of diminished resources on a person's ability to cope with the environment? Is there a relationship between the ability of a person to confront the environment and his/her level of dependence upon family and friends, or his/her willingness to accept as valid others' suggestions and interferences?

Before concluding, it seems important to add a few more observations concerning not only a particular aspect of this project, but the study of life satisfaction of the aged in general. This study has produced several indicators of life satisfaction, or well-being. It appears, however, that a need exists to improve these indicators, to measure their relative values and to determine the effects they have on each other in order to better estimate their impact on life satisfaction. Research would also benefit if, instead of isolated respondents, the study could include respondents and "relevant others" in accordance with the principle of reciprocity supported by social exchange theory. The approach would be as least as beneficial as the often advocated "longitudinal study."

This thesis has addressed questions and provided answers regarding the relationships between life satisfaction of the elderly and social resources, social context and change. Due to the preliminary

and exploratory character of this research, the answers are far from final and are limited by the relevant issues which have been identified in this chapter. Nevertheless, it is the belief of this student that the value of this project must be judged not in terms of the answers provided, but rather in terms of its contribution to the establishment of a theoretical framework which can be used effectively to investigate questions about life satisfaction of the elderly which are yet to be resolved.

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APPENDIX I

PART ONE QUESTIONNAIRE

Statement	Strongly Agree	Somewhat Agree	Do Not Agree or Disagree	Somewhat Disagree	Strongly Disagree
1. As I grow older, things seem better than I thought they would be.					
2. I have gotten more of the breaks in life than most of the people I know.					
3. This is the dreariest time of my life.					
4. I am just as happy as when I was younger.					
5. My life could be happier than it is now.					
6. These are the best years of my life.					
7. Most of the things I do are boring or monotonous					
8. I expect some interesting and pleasant things to happen to me in the future.					
9. The things I do are as interesting to me as they ever were.					
10. I feel old and somewhat tired.					
11. I feel my age, but it does not bother me.					
12. As I look back on my life, I am fairly well satisfied.					
13. I would not change my past even if I could.					
14. Compared to other people my age, I've made a lot of foolish decisions in my life.					
15. Compared to other people my age, I make a good appearance.					
16. I have made plans for things I'll be doing a month or a year from now.					
17. When I think back over my life, I didn't get most of the important things I wanted.					
18. Compared to other people, I get down in the dumps too often.					
19. I've gotten pretty much what I expected out of life.					
20. In spite of what people say, the lot of the average man is getting worse, not better.					

APPENDIX II

PART TWO QUESTIONNAIRE

1. Generally speaking, how would you rate your health compared to other people of your age?
☐ very good
☐ good
☐ average, the same
☐ poor
☐ very bad
2. Now, think back at your life, would you say you have been generally:
☐ very healthy
☐ mostly healthy
☐ normal
☐ not very healthy
☐ mostly ill
3. How would you rate your spouse's health? (skip if widow/widower)
☐ very good
☐ good
☐ average
☐ poor
☐ very bad
4. Is there any member of your family who at the present time is seriously ill? (who?)

5. What kind of impact has this illness on your day-to-day activities?
☐ very great
☐ great
☐ moderate
☐ not very great
☐ none
6. How do you feel about the medical treatment you are receiving?
☐ extremely satisfactory
☐ moderately satisfactory
☐ slightly satisfactory
☐ not too satisfactory
☐ very unsatisfactory
7. How does your health limit the work you are able to do? Can you do work that is:
☐ highly strenuous
☐ moderately strenuous
☐ slightly strenuous
☐ only a little work at a time
☐ cannot work at all
8. Does your health keep you from visiting friends and family?
☐ frequently
☐ sometimes
☐ never
9. Are you at the present:
☐ working as a consultant
☐ working part-time
☐ looking for work
☐ retired, not looking

10. When did you retire?
 ___ 1973
 ___ 1978
11. How did you reach a decision to end working? (Please check one)
 ___ compulsory age
 ___ employer or supervisor decision
 ___ work discontinued
 ___ health reasons
 ___ family reasons
 ___ disliked job
 ___ financially secure & decided to change life-style
 ___ Others _____
12. If an emergency of some kind required that you go back to work, would you be willing to return (not necessarily in your last position):
 ___ very gladly
 ___ gladly
 ___ it would not make any difference
 ___ not too gladly
 ___ would hate to return
13. If an emergency of some kind required that you go back to work in the same place you had when you last went to work, would you be willing to return:
 ___ very gladly
 ___ gladly
 ___ it would not make any difference
 ___ not too gladly
 ___ would hate to return
14. In case of having to go back to work, do you believe you could perform:
 ___ very well
 ___ better than most
 ___ satisfactorily
 ___ not too well
 ___ could not do well at all
15. What position did you have at the time of your retirement?

16. How many hours a week did you usually spend a week?

17. In your work with the company, how has your level of responsibility changed through the years?
 ___ increased considerably
 ___ increased somewhat
 ___ stay the same
 ___ decreased somewhat
 ___ decreased considerably
18. Compared to your original training and the first couple of job you had, how has the nature of your job changed through the years? (Describe)

19. How did the training you had or the first couple of jobs prepare for your work later?
 ___ very well
 ___ well
 ___ moderately well
 ___ not too well
 ___ not at all
20. Do you feel that retirement has altered the way other people deal with you? (If yes, explain)

21. Would you say that, after retirement, you are:
 ___ more active than before
 ___ the same as before
 ___ less active than before

22. How satisfied are you with your level of activities?
☐ very much satisfied
☐ moderately satisfied
☐ not very satisfied
☐ not satisfied at all
23. Would you like to change your level of activities?
 (Describe)

24. To what extent do you feel that you let "slip by" participation into activities that you previously engaged in an active manner because they are too demanding for you now? You let slip by:
☐ a great deal of activities
☐ a moderate amount of activities
☐ just a few activities
☐ none at all
25. Do you feel that your family and friends expect you to engage in activities:
☐ much more than you feel like
☐ somehow more than you feel like
☐ about the same amount you feel like
☐ less than you would like to
☐ much less than you like to
26. (If discrepancy exists)
 To what extent do you find it difficult to adjust to the level of activities you think people expect from you?
☐ very difficult
☐ difficult
☐ not very difficult
☐ not difficult at all
27. Which of the following statement do you agree mostly with? (Please check one)
☐ I do not know what to do with my time--since it seems to pass by very slowly.
☐ Sometimes I have time I do not know what to do with
☐ Very seldom I have time to do the things I want to
☐ I am so busy I cannot find time to do all the things I want to
28. In terms of problems of everyday life and ability to deal with them, you are experiencing:
☐ less problems than ever before
☐ same problems as always
☐ more problems than ever before
☐ many more problems than ever before
29. How important do you consider adequate housing to be for you and your family?
☐ extremely important
☐ moderately important
☐ slightly important
☐ not important at all
30. How satisfied are you with your housing arrangements?
☐ extremely satisfied
☐ moderately satisfied
☐ slightly satisfied
☐ slightly dissatisfied
☐ moderately dissatisfied
☐ not satisfied at all
31. How would you rate your neighborhood?
☐ a very nice place to live
☐ a nice place to live
☐ an average place to live
☐ a poor place to live
☐ a very bad place to live
32. How would you rate your housing convenience in relation to distance from banks, stores, churches, etc.
☐ very convenient
☐ somewhat convenient
☐ somewhat inconvenient
☐ very inconvenient
33. How long have you been living here?

34. What were the reasons that most influenced you to move here initially?

35.

Since you have lived here, what changes have you experienced in:	Very Pos.	Mod. Pos.	No Chg.	Some. Neg.	Very Neg.
environment & neighborhood quality.....					
availability and quality of services...					
convenience of access to banks, churches, stores, bus stops, etc...					
improvements directly related to comforts, size, and aesthetic qualities of your own house.....					
others (describe) _____					

36. Please try to think back to 1969 or ten years ago. Do you believe there is a change since then in your ability to keep house?

☐ much more difficult
☐ somewhat more difficult
☐ about the same
☐ somewhat easier
☐ much easier

37. How satisfied are you of your relations with your neighbors?

☐ very satisfied
☐ mostly satisfied
☐ indifferent
☐ mostly unsatisfied
☐ very unsatisfied

38.

Have you noticed changes in your ability to deal with housing costs in the last ten years in the following items? If yes, please check in what direction.

	De-creased	Somewhat Decreased	No Change	Somewhat Increased	In-creased
mortgages					
repairs (major)					
upkeep					
taxes					
insurance costs					
utilities					

39. How do you feel about them?
 ___ threatened or worried of not
 ___ being able to face them
 ___ worried
 ___ not too worried
 ___ fairly confident you can
 ___ deal with them
 ___ not concerned at all
40. What kind of solution would you
 consider in case the problems
 you just mentioned continue
 or increase?
-
41. How often do you get out of the
 house to go to the supermarket,
 banks, shopping center, etc.?
 ___ daily
 ___ semi-weekly
 ___ weekly
 ___ monthly
 ___ less than monthly
 ___ never
42. Please think of yourself back
 in 1969. How often did you
 go out of the house then to
 supermarkets, banks, shopping
 centers, etc.?
 ___ daily
 ___ semi-weekly
 ___ weekly
 ___ monthly
 ___ less than monthly
 ___ never
43. How do you get around?
 ___ walk
 ___ bus
 ___ drive own car
 ___ ride other's car
 ___ taxi
 ___ other _____
44. Please try to think back in
 1969. Can you describe any
 changes that have occurred since
 then in the way you used to get
 around? (Describe: kind, rea-
 sons, and impact on your life)
45. How safe do you feel in your
 house?
 ___ very safe
 ___ moderately safe
 ___ not very safe
 ___ not safe at all
46. Are you ever concerned about
 safety when you go places?
 ___ not at all concerned
 ___ slightly concerned
 ___ moderately concerned
 ___ very concerned
47. How important is it for you to
 have a good relation with your
 family?
 ___ very important
 ___ moderately important
 ___ not very important
 ___ not important at all
48. Do you have any living children?
 ___ yes
 ___ no
49. If yes, how many:
 ___ live with you
 ___ live 10 minutes away
 ___ live within the same city
 ___ live within 150 miles
 ___ live over 150 miles
50. How often do you visit or talk
 to them?
 ___ daily
 ___ weekly
 ___ monthly
 ___ less than monthly
 ___ never
51. Do you have any living grand-
 children?
 ___ yes
 ___ no
52. How often do you visit or talk
 to them?
 ___ daily
 ___ weekly
 ___ monthly
 ___ less than monthly
 ___ never

53. If you have something that bothers you or it is important to you, do you have somebody to share it with? (describe) _____
-
54. How often do you visit or talk to your family, other than your children?
 _____ daily
 _____ weekly
 _____ monthly
 _____ less than monthly
 _____ never
55. How often do you visit or talk with your friends?
 _____ daily
 _____ weekly
 _____ monthly
 _____ less than monthly
 _____ never
56. Please try to think back in 1969. How often did you then:
 a. talk or visit with your children
 _____ daily
 _____ weekly
 _____ monthly
 _____ less than monthly
 _____ never
 b. talk or visit with your family (other than your children)
 _____ daily
 _____ weekly
 _____ monthly
 _____ less than monthly
 _____ never
 c. talk or visit with your friends
 _____ daily
 _____ weekly
 _____ monthly
 _____ less than monthly
 _____ never
57. How satisfied are you with the relation you have with your children?
 _____ very satisfied
 _____ adequately satisfied
 _____ not too satisfied
 _____ very unsatisfied
58. How satisfied are you with the relation you have with your family (other than your children)
 _____ very satisfied
 _____ adequately satisfied
 _____ not too satisfied
 _____ very unsatisfied
59. How satisfied are you with the relation you have with your friends?
 _____ very satisfied
 _____ adequately satisfied
 _____ not too satisfied
 _____ very unsatisfied
60. In terms of having people to do things together with or to assist you with your problems would you like to have a larger or a smaller family?

-
61. Would you prefer to interact with more people socially?
 _____ yes
 _____ no
62. Are you in a position to financially contribute to solve your family problems? (describe)

-
63. To what extent is your family the kind that if one needs a favor (including financial), someone or all together try to help?
 _____ very much like this
 _____ somewhat like this
 _____ not very much like this
 _____ not at all like this
64. How many organizations do you belong to?
 _____ civic _____
 _____ religious _____

65. How many organizations did you belong to 10 years ago?
 ___ civic
 ___ religious
66. What positions do you occupy in these organizations?

67. What positions did you occupy 10 years ago?

68. How much of your time and energy do you invest in the organizations you belong to?
 ___ a great amount
 ___ a moderate amount
 ___ a small amount
 ___ none at all
69. How much of your money do you invest in the organizations you belong to?
 ___ a great amount
 ___ a moderate amount
 ___ a small amount
 ___ none at all
70. How much satisfaction do you derive from the organizations you belong to?
 ___ a great amount
 ___ a moderate amount
 ___ a small amount
 ___ none at all
71. In the last 10 years do you feel there has been a change in the amount you have invested in the organizations you belong to?
 ___ yes, increased
 ___ no, stay the same
 ___ yes, increased
72. In the last 10 years do you feel there has been a change in the amount you have benefited from the organizations you belong to?
 ___ yes, increased
 ___ no, stay the same
 ___ yes, decreased
73. All things considered, how satisfied are you with regard to your financial situation these days?
 ___ very satisfied
 ___ moderately satisfied
 ___ slightly satisfied
 ___ slightly unsatisfied
 ___ moderately unsatisfied
 ___ very unsatisfied
74. Please think back to 1969, how satisfied were you then?
 ___ very satisfied
 ___ moderately satisfied
 ___ slightly satisfied
 ___ slightly unsatisfied
 ___ moderately unsatisfied
 ___ very unsatisfied
75. Would you say that in comparison with your friends and acquaintances your life-style is:
 ___ much better than most
 ___ better than most
 ___ the same
 ___ somewhat lower than most
 ___ much lower than most
76. Would you say that, as far as you are concerned, in the last 10 years things have changed (in financial terms):
 ___ for the best
 ___ for the better
 ___ stay the same
 ___ deteriorated
 ___ could hardly have gone worse

77. How many other people do you help to support financially (besides your spouse) at this time?

78. Do you render some other kind of support besides financial?

79. Did you render some other kind of support 10 years ago, or do you feel there has been a shift in the burden you carry? (Describe) _____

80. Does someone in your family or friends provide you with financial help?

_____ yes

_____ no

81. Does someone of your family or friends provide you with some other kind of help?

_____ yes

_____ no

82. In the past 10 years did you notice any difference in the amount of help you receive from others?

83. How much of a burden on you is the help you provide your family and friends?

_____ extremely demanding

_____ somewhat demanding

_____ not too demanding

_____ not a problem at all

84. How would you rate the burden on your family and friends for the help they provide to you?

_____ extremely demanding

_____ somewhat demanding

_____ not too demanding

_____ not a problem at all

85. If you compare yourself with the people you know (family, friends, etc.) would you say that you are:

_____ much more educated and informed than most

_____ somewhat more educated and informed than most

_____ not more, nor less than average

_____ somewhat less educated and informed than most

_____ much less educated and informed than most

86. To what extent do you find that you need advice from your family and friends before you make a major decision?

_____ very often

_____ often

_____ sometimes

_____ seldom

_____ never

87. Please think back to 1969. How often did you ask for advice then?

_____ much more often than now

_____ slightly more often than now

_____ about the same

_____ less often than now

_____ never

88. If you take a look at your life, would you say that you have been:

_____ much more successful than most people you know

_____ somewhat more successful than most people you know

_____ the same as most people you know

_____ less successful than most people you know

_____ not successful at all

89. How often does someone from your family or friends ask for your advice?

_____ very often _____ seldom

_____ often _____ never

_____ sometimes

90. Please think back about 10 years ago. How often did your family or friends ask for advice then?
- ☐ much more often than now
- ☐ slightly more often than now
- ☐ about the same as now
- ☐ less often than now
- ☐ never or almost never
91. How often do you spend time and energy to help your family and friends just because you feel they expect it from you, or because you owe them something?
- ☐ often
- ☐ sometimes
- ☐ seldom
- ☐ never
92. How often do you spend money to help your family and friends just because you feel they expect it from you or that you owe them something?
- ☐ often
- ☐ sometimes
- ☐ seldom
- ☐ never
93. How often do people spend time and energy in their relations with you because they feel or think they owe you something?
- ☐ often
- ☐ sometimes
- ☐ seldom
- ☐ never
94. How often do people spend money in their relations with you because they feel or think they owe you something?
- ☐ often
- ☐ sometimes
- ☐ seldom
- ☐ never
95. Please think back 10 years ago. Did you spend money, energy and time with your family and friends because you felt they expected it from you or you owed it to them:
- ☐ much more often than now
- ☐ more often than now
- ☐ about the same as now
- ☐ less often than now
- ☐ never or almost never
96. Please continue to think back 10 years. Did people spend money, energy and time to relate to you just because they felt it was expected or they owed you something:
- ☐ much more often than now
- ☐ more often than now
- ☐ about the same as now
- ☐ less often than now
- ☐ never or almost never
97. I am going to read you a statement and I want to know to what extent you agree or disagree with it: My children are too busy with their activities and their lives and I feel bad about interrupting their schedules to visit them.
- ☐ strongly agree
- ☐ slightly agree
- ☐ do not agree or disagree
- ☐ slightly disagree
- ☐ strongly disagree
- Now tell me to what extent you agree or disagree with my next statement: Ten years ago my children were too busy with their activities and their lives and I felt bad about interrupting their schedule to visit them.
- ☐ strongly agree
- ☐ slightly agree
- ☐ do not agree or disagree
- ☐ slightly disagree
- ☐ strongly disagree

98. Do you believe that your friends and family care for your approval?
 ___ very much
 ___ somewhat
 ___ not very much
 ___ not at all
99. How important is your family approval for you?
 ___ very much
 ___ somewhat
 ___ not very much
 ___ not at all
100. How important is your friends approval for you?
 ___ very much
 ___ somewhat
 ___ not very much
 ___ not at all
101. How often do people come for help or advice from you thinking that you have a special skill, knowledge or quality?
 ___ very often
 ___ often
 ___ sometimes
 ___ seldom
 ___ never
102. How often did people come for help and advice in the past thinking that you had a special skill, knowledge or quality?
 ___ much more often than now
 ___ somewhat more often than now
 ___ about the same as now
 ___ less often than now
 ___ never
103. Please tell me the statement you agree the most with:
 ___ I could not accomplish anything without the support of my friends and family
 ___ my friends and family support is important but not necessary
 ___ my friends and family support is desirable but not important
 ___ my friends and family support does not matter one way or another
 ___ I accomplish my goals in spite of the problems and interference of my family and friends
104. In case you will be (or in case you have been) in a position to have to depend upon your family or friends for a major problem you would (or did):
 ___ ask directly for help (confident that you will obtain it)
 ___ ask indirectly for help (hoping to convince the, although you do not feel comfortable doing it)
 ___ never ask them, just get professional help
 ___ ignore the problem, because you do not like to depend upon anybody
- (please go to page 122 for questions 105 and 106.)
107. How many years of school have you completed? _____
108. How many people are living in this household? _____
109. Are you:
 ___ single ___ married
 ___ divorced ___ widow(er)
110. How long have you been married? _____ years.
111. How many years have you worked for the company? _____
112. How old are you? _____
113. Sex:
 ___ female ___ male

105.

On a scale of 1 to 5, how important were the following aspects of your work?	Very Important	Somewhat Important	Not Very Important	Not Important At All
prestige among fellow workers.				
prestige among family. . . .				
prestige among friends . . .				
satisfaction of relating to people at work.				
satisfaction for doing something useful				
satisfaction for being creative and able to solve problems				
keeping busy at something. .				
staying out of the house and family problems.				

106.

How often do you participate in the following activities?	Daily	Weekly	Monthly	Less than Monthly	Never
watch TV or listen to radio. . . .					
read books, magazines or newspapers					
work on hobbies, crafts, etc. . . .					
sing or play					
work in the garden					
work on home maintenance or do repairs on house or apartment. . .					
go for short rides or walk					
participate in sports or exercise					
go to a club meeting or other organization					
go to church services or religious related activities					
go to concert, play, movie, opera lectures or sports events.					
do volunteer work (such as helping in charity drives, hospital or community work). . . .					
play cards, bingo, etc.					
visit family members					
visit friends.					
take trips away from home lasting more than one day.					