Abstract

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This study was concerned with re-engagement--an increase in social interaction after retirement--as one possible adjustment to aging. Fifty-eight white retired men of three classes (upper-middle, middle-middle, and lower-middle) and two geographical locations (rural and urban) were interviewed to determine their social interaction in the year prior to retirement (pre-retirement), the year subsequent to retirement (post-retirement), and in the year interviewed (current).

The theoretical background came from Cumming and Henry's disengagement theory which proposes decreasing social involvement as one ages. Retirement for men, and widowhood for women are seen as the initial social impetus for disengagement.

No statistically significant class or location differences were found, using the role count means as the general measure of re-engagement.

Increased interaction occurred in the post-retirement period among the urban, upper-middle class, and lower-middle class subsamples. This increased interaction was due to more socializing with relatives, neighbors, and specific people, e.g., sales clerks.

Re-employment occurred among at least one-third of each of the classes. Reasons for re-employment varied by class. The primary reason for re-employment in the upper-middle class was enjoyment of work. In the middle-middle class there were two major incentives for re-employment:

money and to keep busy. The prime factor for re-employment in the lower-middle class was money.

The upper-middle class had the highest frequency of post-retirement and current memberships in at least two voluntary associations. Frequencies of middle-middle and lower-middle class memberships in at least two voluntary associations were almost identical in the post-retirement and current periods.

Memberships in senior citizen and retirement groups were infrequent.

Discrepancies between the Cumming and Henry study and this study are hypothesized to be due to geographical differences; therefore, the present study supports cautionary statements about the inevitability and universality of disengagement.

RE-ENGAGEMENT AMONG WHITE RETIRED URBAN AND RURAL MEN

by

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APPROVAL PAGE

This thesis has been approved by the following committee of the Faculty of the Graduate School at the University of North Carolina at Greensboro.

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Mrs. Helen S. Taylor typed the final thesis. Her editorial ability and interest cannot be overstated.

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Introduction

The purpose of this thesis is to examine re-engagement among recently retired urban and rural men of varying socioeconomic backgrounds. Re-engagement is defined as an increase in social interaction following the loss of the work role with retirement.

The role of worker assumes other people in other roles (fellow worker, client, customer) with whom interaction is carried out. At retirement, the role of worker and its accompanying interaction is dropped from an individual's role set. Re-engagement is the replacement of the work role by another role or roles. Where the individual has become re-employed it may include a new work role, or it may involve non-work roles which have been expanded or newly added.

Eight roles (relative, household member, friend, neighbor, specific person, fellow worker, church-goer, and organization member) were examined to analyze social interaction in three periods (pre-retirement, post-retirement, and current).

Re-employment is seen as a source of re-engagement because of the primacy of work in the lives of many people. There are four general reasons for re-engagement through re-employment: 1) financial remuneration, 2) self-definition as worker (including the Protestant work ethic influence), 3) intrinsic satisfaction derived from work, and 4) increased social interaction (sociability). Regardless of the reason or reasons for re-employment, the addition of the worker role increases the interaction.

Re-engagement through formal institutions may be primarily for the purpose of sociability although a common sharing of interests may occur concurrent with increasing social interaction. Civic, professional, and occupational associations may deal explicitly with instrumental ends but sociability is part of the mechanism by which these ends are achieved. Other organizations mixing the instrumental and the social are hobby, senior citizen, and retirement groups. Fraternal organizations can be both instrumental and social but they may emphasize the brotherhood of fellow members thus reenforcing the sociability aspects of those organizations. Religious institutions are among the most important organizations for the elderly. Their importance is only partly social; concern of the elderly over the meaning of life and the imminence of death, are further reasons for their support by the elderly.

Perhaps the most immediately available source for increased social interaction are family, friends, and neighbors. These informal attachments are open to the retiree without formal requirement of dues, attendance, or particular skills which other interactors might impose. Retirement may create fears in the retiree about his competence and self-worth; support from informal but longstanding attachments may ease the loss of the work role.

The possibility of re-engagement may differ between rural and urban residence. Self-employed and small businesses predominate in rural areas. Retirement may tend to be more gradual in rural areas with the self-employed setting their own schedule for retirement. Those rural workers employed in small businesses may also retire gradually if that is their wish and their employer agrees. For this population,

gradual retirement may mean that re-engagement is by-passed.

The possibility and type of re-engagement sought through re-employment may vary by former occupation. Occupations demanding a long period of preparation during which the trainee is exposed to vigorous professionalization may disincline the worker from disengaging. Once retired, the retiree may seek re-engagement. Retirees from low paying occupations may seek re-employment for financial remuneration while those retirees with intrinsically satisfying occupations may seek work in the same or similar occupation.

Re-engagement for sociability purposes can also be expected to differ by social class. Increasing social interaction through voluntary associations, friends, neighbors, and kin is probably open to all classes. Voluntary associations may be most accessible to the upper-middle class although membership in voluntary associations is probably found among most classes.

A brief overview of perspectives or theories of aging is given in Chapter One. Chapter Two reviews the literature pertinent to the problem. Chapter Three outlines the methodology used and the hypotheses tested. Chapter Four reports the findings. Chapter Five provides a summary of this study and its limitations and relationship to disengagement. The appendix includes copies of the interview schedule and letters requesting an interview as well as a table of demographic statistics.

Chapter I

Theoretical Base

Social gerontological research is quite new, certainly no more than three or four decades old. During this time, theorizing on aging has been hampered by the number and complexity of variables involved. Because of the discipline's youth and the methodological problems, these theories might be more accurately called perspectives or frameworks. This review covers five social and/or social-psychological theories of aging.

Activity Theory

Of all the social and social-psychological theories of aging, the activity theory is the least precise both in origin and explication. It might better be called the activity perspective.

Apparently the originators of the activity theory were the practitioners of the 1940's. These practitioners who worked with the elderly in public or private homes and charities equated the maintenance of activity with happiness or adjustment in aging. There is a circle here in that these practitioners were hired to direct activity programs for the elderly. Despite its quasi- or pseudo-theoretical status, the activity theory was the only framework for early social gerontologists.

The activity theory stresses the maintenance of middle-aged behavior for as long as possible. While some activities, primarily through mandatory retirement, may be forcibly withdrawn from the

individual, other activities should be substituted. Obviously, particularly due to ill health or lowered income, not all elderly can maintain the desired level of activity.

There has been confusion in theorizing about the elderly. On the one hand, gerontologists conduct research to find the good life or the life-style most satisfying to the elderly individual. On the other hand, life satisfaction may not be equivalent to a theory of social aging. There may be a variety of ways to age successfully while there are many elderly who do not age successfully either by their subjective standards or by the standards utilized by researchers. Confusion arises when variables associated with successful aging are generalized to the entire elderly perspective. Activity types and amounts have been used as indicators of successful aging.

Robert J. Havighurst is concerned with successful aging. "A person is aging successfully if he feels satisfied with his present and past life," states Havighurst (1963:305).

Havighurst points out that the activity theory is popular among people who work with the aged. He mentions that Cumming and Henry feel that using middle age behavior for judging old age behavior reflects a bias. Havighurst refers to Cumming and Henry who believe there may be a developmental stage past middle age which has its own characteristics.

Havighurst believes that life satisfaction in the later years will follow the activity theory for some, and the disengagement theory (which is discussed below) for others. Further research is needed testing the relation of life satisfaction to both the activity and disengagement theories.

Further support for the activity theory is found in the Review of the Literature under Criticism of the Disengagement Theory. In particular Sheldon S. Tobin and Bernice L. Neugarten (1961), Richard Videbeck and Alan B. Knox (1965), E. Grant Youmans (1967), George L. Maddox (1963), Robert J. Havighurst (1968), Margaret Clark and Barbara Anderson (1967), and Arnold M. Rose (1965) have found empirical support for the activity theory.

Continuity or Developmental Theory

Research on the continuity or developmental theory of aging is hampered by the need for longitudinal observation of respondents. Ideally, developmental research of the elderly should begin during infancy and continue until death. Because of social and social-psychological generational differences, cross-generational samples are less desirable than longitudinal studies.

Theory and research in the developmental theory has been limited largely to psychologists. The strong influence of Freud with his emphasis on infant, childhood, and adolescent development has diverted research and theory away from adulthood.

Eric Erikson (1963) proposes eight stages of development. Erikson's formulation is one of the few which encompasses the entire life span. Each stage represents a crisis or dilemma the individual faces. All crises are present throughout the life cycle; however, each stage emphasizes a particular crisis. Development is dependent on how the individual resolves the previous crises. The first six stages covers the life span through young adulthood. These stages are: 1) basic trust versus basic mistrust, 2) autonomy versus shame and doubt, 3) initiative versus

guilt, 4) industry versus inferiority, 5) identity versus role confusion, and 6) intimacy versus isolation.

The seventh stage, generativity versus stagnation presents itself during middle adulthood. Generativity has components of productivity and creativity in it but its major focus is helping the younger generation. Erikson recognizes a need by the older generation to be needed by the younger generation. Generativity is losing oneself in others.

The eighth stage, integrity versus despair occurs in late adulthood. Integrity is a sense that one's life has had meaning. Regardless of disappointments or failures experienced during life, an individual who successfully meets this stage sees his life as having been right and inevitable. It is an acceptance of all that he has participated in. He has ego integration. The aged individual who is not successful in this stage has despair. Erikson sees this despair as a fear of death and a sense that it is too late to change one's life.

Robert C. Peck (1968) expands Erikson's last two stages. He sees the crises of middle age as different from old age. The stages within middle age and old age may differ from the order presented here.

The four stages of Peck's middle age are: 1) valuing wisdom versus valuing physical powers, 2) socializing versus sexualizing in human relationships, 3) cathetic flexibility versus cathetic impoverishment, and 4) mental flexibility versus mental rigidity.

Valuing wisdom versus valuing physical powers is resolved with the emphasis of mental ability over declining strength or attractiveness. The mental ability Peck speaks of is not simply intelligence but also the emotional security to make viable decisions. The experiences of a

lifetime mean that one's judgment is better than at younger ages.

Socializing versus sexualizing in human relationships is influenced by the previously mentioned decline in physical strength and attractiveness. Those in middle age experience the sexual climacteric. Peck believes this permits the middle-aged to view others as individuals instead of sex objects.

Cathetic flexibility versus cathetic impoverishment can be translated into emotional flexibility versus emotional impoverishment, Peck states. It is during middle age that friends and relatives begin to die off and children grow up and depart. These years are usually the busiest with the greatest expansion of life space. Cathetic impoverishment is experienced by those unable to replace the losses through new relationships and/or interests.

Mental flexibility versus mental rigidity is illustrated by whether the individual feels he has control over his life or whether he feels dominated by events. By middle age many patterns, attitudes, and behaviors are adopted which due to the degree of mental flexibility may or may not be changed. Peck believes mental flexibility is a desirable trait for the middle-aged and elderly.

The three stages of Peck's old age are: 1) ego differentiation versus work-role preoccupation, 2) body transcendence versus body preoccupation, and 3) ego transcendence versus ego preoccupation.

Ego differentiation versus work-role preoccupation is particularly important for males, states Peck. The loss of the work role because of retirement may be eased by a sense of personal worth derived from non-work factors. Peck believes that for women this stage may occur in

middle age with the departure of children. The individual must find an identity apart from his work or her maternal role.

Body transcendence versus body preoccupation is the resolution of the crisis of declining health. Body transcendence, Peck believes, is achieved through emphasis on warm human relationships, creativity, and the use of mental and social abilities.

Ego transcendence versus ego preoccupation is the crisis of impending death. By living a life full of concern for others, and contributing to society, one may see oneself transcending death. Peck considers this crisis to be the most important because death is something everyone experiences.

Unlike Erikson and Peck who theorize about later life personality, Bernice L. Neugarten (1964) seeks empirical evidence of personality changes in middle and old age.

Reviewing some of the empirical results of the Kansas City Studies of Adult Life, Neugarten feels that personality organization is maintained through the later years. She suggests that studies which correlate psychological disintegration with age could be better understood if health and social losses were examined.

When projective techniques (Thematic Apperception Tests or TATs) were utilized, responses did differ by the respondents' ages,Neugarten reports. Withdrawal from the social environment and a more passive viewpoint characterized the majority of older respondents. In addition, the world was seen as dangerous by the elderly, particularly if they didn't conform. In contrast, younger respondents were involved in the environment and they took vigorous, even aggressive attitudes toward

the world. While younger respondents could create complex stories around the TAT cards, the older respondents elaborated less, i.e., they introduced fewer non-pictured characters.

With interview data alone, or in combination with the projective techniques, no significant personality changes are found with age. Neugarten states that projective techniques reveal covert or intrapsychic phenomena; interviews and projective techniques together, or interview data alone, reveal overt or socioadaptational phenomena. These findings support earlier studies of introversion and lessened social life space on the one hand, and external social factors (finances, health, work and marital factors) influencing adjustment on the other hand.

These intrapsychic phenomena, Neugarten reports, support the disengagement theory. Neugarten sees two components of the intrapsychic: 1) increasing introversion, and 2) decline in some processes of cognition. The increased introversion is seen by Neugarten as a developmental characteristic. Introversion may begin in the forties, preceding the social withdrawal found later in life. Pathological responses to the TAT existed among respondents who otherwise were integrated and functioning well in the community. This was also found in other studies. At this point Neugarten sees a dilemma in diagnosing mental illness: Are the symptoms of mental illness the same for all age groups?

The decline in cognition means that the elderly rely on tested and trusted ways instead of trial and error. As the decline proceeds, social life space recedes and the elderly person's personality becomes accentuated. To Neugarten, it appears that as one ages, one becomes more like oneself.

Neugarten feels that the changes in the intrapsychic phenomena may be influenced by biological changes. These intrapsychic changes begin in the forties (before the onset of social changes) when other known biological changes occur. Chronological age reflects the passage of time and as such is less valuable in analysis than health status.

There appears to be a continuation of coping mechanisms which permit social integration despite the decline in intrapsychic processes. These coping mechanisms permit a relatively stable relationship with the environment. Neugarten views the elderly person as a "socioemotional institution" composed of his coping mechanisms, and his stable interactions with others and the environment.

The Elderly as a Subculture

Arnold M. Rose (1965) sees the elderly developing a subculture. This subculture is based on the fact that many American elderly find themselves excluded from younger generations and that there is an attraction among the elderly for their peers because of common problems. The elderly are seen as non-productive with no special enduring attributes, such as wisdom, which are found in some other societies. Rose believes there is currently a transition of the elderly from being a category to becoming a group. As the isolation of the elderly continues, the aging subculture will grow and become more detailed.

Rose lists eight trends which seem to encourage the development of an aging subculture. First, an increasing number and proportion of the American population is sixty-five or older. Second, medical advances have permitted the elderly to be in better health than previous generations of elderly. Third, while acute diseases have been overcome in

many instances, chronic illnesses which require longer medical treatment tend to be contracted by the older generation. Fourth, segregation of the elderly has occurred through the outmigration of the young from rural areas and center cities, and from the migration of the elderly to warm climates. In addition, some aging suburbanites are moving into the center city. Fifth, a decline in self-employment and an increase in retirement (both mandatory and voluntary) serves to decrease the work opportunities of the elderly which in turn reduces the integration of the aged. Sixth, the better financial and educational position of today's elderly (in comparison with previous generations of elderly) means they can engage in constructive activity which may contribute to the subculture. Seventh, social services aimed towards the aged bring them together, thus fostering the subculture. Eighth, the elderly tend to live apart from their children. In those instances where they do cohabit, it is the aged parent who is seen as dependent.

Extent of involvement in the aging subculture will vary by the individual, Rose believes. Unlike ethnic, religious, and racial subcultures, the aging subculture has a temporal component. Only a portion of one's life will be spent in the aging subculture. Involvement in and intricacies of the subculture is dampened by this temporary aspect.

Rose believes that the poor and less educated are more likely to be involved in the aging subculture than the well-to-do and well educated. Those elderly living in areas most segregated from the young, e.g., retirement communities, and some rural and center city areas, are more apt to be involved in the aging subculture. The aging subculture may dominate small towns where commerce and recreation cater

to the elderly. In a city, the aging subculture is probably segregated from the remainder of the city.

Rose points out that the aging subculture may supersede other subcultures; that is, age may be a more important identification than religious, racial, or ethnic identifications. However, the elderly person who had disaffiliated himself from his racial, religious, or ethnic origins during much of his lifetime may return to such affiliations in old age.

Rose discusses several factors which may decrease the possibility of the aging subculture. First, greater contacts with the family. Second, the pervasiveness of the mass media tends to cross subcultures. Third, employment would continue integration in society as well as maintain economic independence. Fourth, greater contacts with social services personnel who encourage interaction with others of all ages. Fifth, resistance on the part of the elderly to identify with aging and its subculture. This resistance may result from good health as well as integration and identification with younger people.

Wealth is probably utilized less as a status distinction within the aging subculture because of the decreased variation in the wealth of the retired. Prestige from the former occupation may be carried over into retirement to some extent. But both occupational prestige and power are less important after retirement. Moving from his community, all possible sources of prestige and power of the retiree become less viable. According to Rose, to maintain these sources of prestige most successfully, the elderly should stay in their communities.

Two other factors of status, especially found among the elderly are health and social activity. In younger age groups neither factor would be considered extraordinary. Rose believes that social activity which leads to a better life of and more prestige for the elderly is particularly respected. He realizes that social activity is somewhat dependent on health.

Disengagement is a social, not a natural fact. Rose sees the elderly as being pushed out of work, leadership roles, and membership in associations. He feels this is due to a widespread belief that an elderly person is senile, physically decrepit, and incapable of handling his affairs. (An attitude which may be adopted by some of the elderly themselves.) In addition, unlike some societies, there are few values in American society which would support a more positive evaluation of the elderly.

One response to these negative values, has been the formation of clubs by the elderly for instrumental or expressive purposes. Identification with their peers is encouraged by such groups. The recognition of common problems, discussions about these problems, and movement toward corrective action as a group enhances the consciousness of the aging. These people, Rose believes, could become a pressure group able to direct the voting behavior of its members.

The Elderly as a Minority Group

Gordon Streib (1965) points out that sociologically, the elderly are a category, not a group. Most elderly have no group consciousness. Membership in the elderly minority group is temporary and occurs for only a specific time; however, most people live long enough to become

elderly and thus qualify for the elderly category.

Minority groups are in a submissive position in relation to a dominant group. Streib relates that while the elderly may be submissive in some cases, they were once members of the dominant group. This dominant group changes as time passes and is replaced by a new and younger dominant group.

Streib quotes a Cornell study in which a majority of respondents, over sixty years of age, classified themselves as middle-aged. A Purdue study found that all age categories questioned felt classification of people into middle age or old age was relative--it was dependent on the individual being classified.

Reviewing a study of the McLain movement (which sought raises in Old Age Assistance for the California elderly), Streib finds the participants viewed themselves as citizens rather than members of an age group. Involvement in the movement came from the elderly who felt bewildered because of their dependence, and not from identification with their peers.

Studies of regional and national elites, suggests that the elderly are well represented at both levels; however, they do not constitute a gerontocracy. One study, Streib notes, finds that the elderly are in more national leadership positions (Congressmen, Supreme Court Justices, and heads of federal agencies, etc.) today than in earlier times. On an individual basis, the elderly tend to have higher voting rates than younger cohorts.

In the areas of economic and social security, Streib finds the elderly are underprivileged. Economically deprived elderly fall into two categories: those who have always been deprived, and 2) widows.

Anyone who is deprived finds these deprivations increasing in old age. One study has found that the elderly rarely complain though they live on incomes considered very low by younger people.

While older workers have difficulty keeping and/or getting jobs, this discrimination is most felt by the forty to sixty-five age cohort. People falling in this category are considered to be middle-aged, not elderly, Streib states.

Streib finds no evidence to suggest that the elderly are purposely segregated residentially. Social isolation, probably more common among the elderly than other age cohorts, is not as widespread as many believe. One study, Streib quotes, found that isolation was more dependent on economic status than age.

Because he found no distinct elderly culture and because the status of the elderly is temporary, Streib is disinclined to view the elderly as a minority group. There is little identification with their peers and practically no hostility directed at other age groups. They don't suffer from abridged civil rights nor are they excluded from political roles. Those elderly who are underprivileged in health or finances, are deprived because of aging rather than social structure. He believes viewing the elderly as a minority group can only confuse the issue.

Disengagement Theory

The disengagement theory as presented by Elaine Cumming and William E. Henry (1961) is based on a sample of elderly who participated in the Kansas City Studies of Adult Life in the 1950's. The stratified random sample consisted of white individuals between the ages of fifty and ninety. Although the sample included the working, lower-middle,

and upper-middle class, the respondents did not have any major financial worries. The sampling procedure selected respondents who had no chronic diseases which interfered with their day-to-day living.

Cumming and Henry defined disengagement as "an inevitable process in which many of the relationships between a person and other members of society are severed, and those remaining are altered in quality" (1961:210).

To measure the degree of disengagement or withdrawal from society, Cumming and Henry used three measures of social interaction. The Role Count was the number of roles an individual engaged in. Any reduction in roles decreased the diversity of social contacts.

The second measure of social interaction was the Interaction Index.

> The Interaction Index is a subjective rating based on the amount of each day spent in normatively governed interaction. . . . By normatively governed interaction, we mean contact with others of such a nature that their expectations of the interaction have an impact on behavior. . . . It is in interaction that hints and cues and guides that govern and control behavior are exchanged. . . . (Cumming and Henry, 1961:45).

The third measure of social interaction was the Social Lifespace which was "derived from an actual count of the number of interactions the individual engages in during a given period" (Cumming and Henry, 1961:47).

Disengagement can be seen as a structural-functionalist explanation of social aging at the societal level. For the individual, disengagement is a social-psychological explanation of aging. These two explanations will be examined separately.

Disengagement and Society

Disengagement is the mutual withdrawal of the society from the individual and the individual from the society. It is based on the

biological universalism of the inevitability of death. Because everyone eventually dies, disengagement is necessary for society. The society must insure that vital roles, specifically occupational, are not suddenly vacated due to infirmity and/or death. Retirement removes the aged who are the cohort most likely to become infirm and/or die.

Disengagement alleviates tension between the adult generations by opening up positions left vacant through retirement to younger members. Ideally it also insures that those with the best training and most recent occupationally-relevant knowledge--younger adults--fill the occupational roles. Retirement is also functional to the younger workers who in most cases have heavier financial obligations because of their younger, more numerous dependent family members.

Retirement will be required of almost all aged workers. There are exceptions, however, and these exceptions tend to include the most prestigious occupations in American society. Lawyers, doctors, architects, and the self-employed are exempt from mandatory retirement. Also exempt are high government officials (judges, senators, and representatives).

Disengagement and the Individual

Ego changes occur throughout the life cycle. Until middle age, social life has been expanding; but during (the late) middle age there is a need to conserve one's energy by cutting down on roles and activities. Cumming and Henry describe the beginning of disengagement as that time when the individual starts to feel that time is running out. He becomes aware of his own mortality, often through the death of contemporaries. Instead of counting from his birth onward, the disengaging individual begins to count backward from the time he feels remains to him.

Because the future seems shortened, there is a decreased interest in the long-range goals of the rest of society. The sense of mortality brings with it a concern with the inner self. The disengaging become narcissitic as individuals review their lives and dwell on the prospect of an afterlife. Without the inevitability of death, there would be no impetus for disengagement.

Norms, ordinarily enforced in daily interaction, become less concrete as the disengaging person interacts less frequently with those outside of friends and family. Elderly people, disengaged from much of social life, find interacting with those outside of their circle stressful because they are relatively isolated and lack self-confidence in interaction. Disengagement is thus reinforcing and self-perpetuating.

Cumming and Henry believe that disengagement occurs at retirement for men, and at widowhood for women. The problems each sex face are different but the problems of the retired men are less easily resolved.

Cumming and Henry see three sources of discomfort for the retired male: the peer group is lost, instrumental tasks are no longer required, and there is a loss of status identity. The solution to these problems is disengagement--once it has been accepted. Other solutions to these problems include interaction with kin groups, instrumental activity, and developing pride in what the retiree has accomplished during his working years.

Another solution to unwanted disengagement--re-engagement--is briefly discussed by Cumming and Henry. When society has decided it no longer needs the specific instrumental skills of the retiree, the individual may seek re-engagement by utilizing different skills. To

Cumming and Henry, re-engagement is only temporary and is followed by disengagement.

Cumming and Henry postulate that disengagement is mutual, inevitable, universal, gradual, and self-perpetuating.

Chapter II

Review of the Literature

As the first well-defined, empirically-based theory of social-psychological aging, the disengagement theory drew a great deal of interest. The controversy following publication of the disengagement theory, led Cumming and Henry to separately modify their theory. Despite these modifications, social gerontologists have continued to refer to the original disengagement theory either to support or to criticize.

Support of the Disengagement Theory

Henry (1964) states that the social environment alone cannot explain later life. The disengagement theory, while helpful, needs to take into account the individual personality in studying the aging and their response to the external environment.

Diametrically opposed empirical findings of high morale occurring with low activity of the aged, and high morale occurring with high activity of the aged, led Henry to confess that based on existing studies neither the activity nor the disengagement theory can sufficiently explain social aging.

In her modification of the disengagement theory, Cumming (1964) adapted to the disengagement theory a typology which is concerned with two stylistic modes of interaction.

The first mode, the impinger, depends on feedback from the environment to re-affirm his self-concept; if the feedback conflicts with the impinger's self-concept, he will attempt to bring the reaction of others

more into line with his self-concept. Repeated failures will lead to a modification of the self-concept, Cumming believes.

The second mode, the selector, also relies on interaction to re-affirm his self-concept. He selects those reactions which match his self-concept; if those reactions don't readily appear, he waits for them. Eventually with little or no validating response for his self-concept, the selector will re-align his self-concept with the feedback he is getting. Cumming believes that the selector can maintain his self-concept better because he is more capable of using past interactions to maintain his self-concept.

These two typological modes of personality are functional at different stages of the life cycle, Cumming states. The impinger is best suited or most adaptive at middle age when achievement is secured through outgoing or aggressive behavior. The impinger, needing more continuous interaction than the selector will find reduced social interaction problematic because his self-concept is not being fed. As the impinger ages, his major adjustment will be to avoid confusion brought on through failure to elicit feedback harmonious to his self-concept. The selector is best suited for childhood and old age. The aged selector is better able to cope with aging, i.e., decreased social interaction, due to his ability to use the past; although, he too, may have adjustment problems.

To Cumming, the normal person is one who can switch from the impinger to the selector or vice versa as the occasion requires. Extreme cases of all-impinger or all-selector are rare; but the individual may prefer one mode over the other.

Disengagement, particularly with respect to the reduction of roles, will affect the impinger and selector differently, Cumming believes. The moving of children, death of friends and kin, and retirement can be less disturbing to the impinger than to the selector. The impinger, because of his deep need to interact in order to validate his self-concept, will make new friends and attempt to replace losses. The selector finds those lost roles a problem and he may be unable to replace them. The perception of aging may thus come earlier to the selector.

Male reaction to retirement may be differentiated by the former occupation. If there has been much ego involvement in work so that the male sees himself making a contribution to society, his work group, and his family, initially retirement may precipitate a sense of loss but eventually be replaced with satisfaction from his achievements and from watching others contribute. For those occupations where the worker and his work are alienated so that the only contributions the man sees are to his family and work group, retirement will initially be a release but may be succeeded by a sense of alienation with his past. The retired selector who falls into the second category is believed by Cumming to be particularly susceptible to problems stemming from a lack of self-orientation.

The opposite of disengagement is engagement, not activity per se. Much activity can be sustained by the disengaged. The impinger who is in the process of disengagement, may be active, particularly if he is healthy and restless. Cumming points out that many social gerontologists utilize volunteers for studies, who it may be assumed are mostly impingers. The implication is that a random, representative sample of

elderly would include both impingers and selectors. Results of these more representative samples, utilizing more selectors than is usually done, would tend to support the disengagement theory.

Support for psychological disengagement was found by Neugarten (1964). With increasing age, respondents showed a greater preoccupation with interiority, decreased emotional investment in the outer world, and a reduced complexity of personality. The study indicated age was a greater determinant of increased eccentricity than was extent of social interaction. Neugarten believes that while there is a close relation between social and psychological disengagement, the latter precedes the former.

Richard H. Williams and Claudine G. Wirths (1965) studied one hundred and sixty-eight respondents who were interviewed approximately seven times over five and one-half years. Ninety-one of these respondents were interviewed by clinical psychologists. Information was received on the respondents with respect to life history, life satisfaction, health and welfare, social relations, activities, attitudes about inner and outer events, decision-making, and personality.

Williams and Wirths see their work as supporting disengagement which is problematic for the majority of Americans. So common is disengagement, believe Williams and Wirths, that if the individual himself is not disengaging then someone close to him is. Aging successfully does not necessarily mean mandatory disengagement; rather, successful aging is related to the manner the individual copes with whatever degree of disengagement appears.

Life style can affect disengagement. Disengagement was found in all the life styles studied by Williams and Wirths. There are four aspects of the relation of life style to successful disengagement: 1) self-pacing, 2) the development of more than one life style, 3) maintaining the life style while relinquishing things, and 4) skill in handling problems of health and retirement.

Although disengagement is inevitable, it may be forced on the individual from the outside. One category of respondents, the "precarious," was filled by respondents who had resisted disengagement. While disengagement may occur in the early fifties, the late sixties and seventies are the most common ages for disengagement. However, Williams and Wirths believe that to successfully disengage, preparations for disengagement should occur between fifty and sixty-five years of age.

Criticism of the Disengagement Theory

The literature criticizing the disengagement theory has centered on: 1) high activity being associated with high morale, 2) maintaining or increasing levels of social interaction with time, 3) social factors inducing disengagement (as opposed to Cumming and Henry's psychological factors), 4) societal and biological trends which make disengagement less than inevitable, 5) personality characteristics being more influential than the disengagement theory originally supposed, 6) the non-representative sample used by Cumming and Henry, 7) social withdrawal in old age correlating with mental illness, and 8) aging consciousness occurring among those who experience both greater happiness and greater resentment against age discrimination.

Studying respondents aged fifty to sixty-nine, and seventy and over, Sheldon S. Tobin and Bernice L. Neugarten (1961) found social interaction and life satisfaction to be positively related in both age groups. The older age group was found to have an even stronger positive relationship between social interaction and life satisfaction. In particular, the findings of greater life satisfaction with engagement at advanced age contradicts the disengagement theory.

High activity correlated with high morale, and low activity correlated with low morale was found in a longitudinal study by George L. Maddox (1963). Good health, in the absence of high activity, was also correlated with high morale. High morale was also found in some respondents who had little activity. In criticizing the Cumming and Henry study, Maddox stresses that the Kansas City sample was not representative of the aging population.

Defining social participation as church activities, voluntary association and public meeting attendance, reading of books and magazines, and political activity, Richard Videbeck and Alan B. Knox (1965) studied adults aged twenty-one to sixty-nine. They found no age differences in social participation. A full continuation of activity in the later years was discovered.

E. Grant Youmans (1967) compared family activities (visiting, advice sought, and help given) of urban and rural women in two age groups: sixty to sixty-four years, and seventy-five years and over. Only slight family disengagement was found in this sample and that disengagement occurred in the rural area.

Reviewing the results of the Kansas City studies and the Duke Geriatrics Project with respect to disengagement, Maddox (1964) found both studies supported social and psychological disengagement. Both studies found that the better-off aged disengage; hence, disengagement among the less advantaged is a likely deduction. However, Maddox finds the claims of disengagement to be inevitable and intrinsic, simplistic. Too little is known of the relationship between the situational and the internal in psychological disengagement to label disengagement as intrinsic.

Disengagement does occur with increasing age, state Margot Tallmer and Bernard Kutner (1969); but there must be a separation of the stresses of aging from the aging process itself--something Cumming and Henry did not attempt.

Kutner (1962) criticizes the disengagement theory for its claim to universality, irreversibility of decreasing social competence, and the social degeneration of aging. Social restrictions such as mandatory retirement, death of family and friends, youth-oriented culture, and age-segregation are seen by Kutner as being as influential in the decrements of aging as any of the biological processes. Re-differentiation and re-integration are proposed by Kutner as alternatives to disengagement. Re-differentiation refers to the redefinition of the self in later life precipitated through biological (energy decline) and social (widowhood and retirement) factors. Roles, activities, and self-perception change throughout the life span; these changes eventually bring a redistribution in values, energies, and commitments. In this transition, functions are found. Kutner believes these new functions are not

necessarily degenerative. The concept of re-differentiation does not dictate the direction or level of the changes (unlike disengagement). After re-differentiation, the individual must re-integrate the new roles and functions into his self-system.

Rose (1964) criticizes the disengagement theory on the grounds that it is functionalist and inevitable. Rose lists several contemporary trends which he believes counteract the concept of disengagement. First, those reaching the age of sixty-five and older are healthier than previous generations. Second, contemporary elderly are financially better off than previous generations of elderly because of social security, pensions, and annuities permitting more expensive leisure participation. Third, the elderly are forming a social movement to enhance their status. This movement will engage elderly people while simultaneously making the rest of society aware of the position of the aged and perhaps decrease societal efforts to disengage the old. Fourth, earlier retirement may encourage re-engagement which could occur past the age of sixty-five and cancel out a second disengagement. Fifth, the expansion of leisure has opened up hobbies once thought effeminate for males. Other leisure activities provide prestige for elderly people. Some hobbies have become almost occupational. Leisure time roles have less of a negative connotation than previously.

Limiting theory and research on the aging to one specific life-style, such as activity or disengagement, is seen by Robert J. Havighurst (1961) as counterproductive. Successful aging is unlikely to be associated with only one type of life-style. He pleads for the use of a variety of measures of life satisfaction within a variety of theoretical

frameworks. Havighurst does believe there is a disengaging force influencing the seventies and eighties; however, personality characteristics will remain despite such disengagement as may occur.

In a later article, Havighurst (1968) found the greater the activity, the greater the possibility of happiness. There were exceptions, though, in which happiness was associated with low activity. Of three variables on which data were collected: activity, satisfaction, and personality, the last appeared most decisive in determining happiness. Because neither the activity nor the disengagement theories deal explicitly with personality, Havighurst believes both theories are unsatisfactory.

In a representative sample of aged mentally-healthy, aged mentally-ill (psychiatric hospitalization), and aged who had been discharged from psychiatric hospitals, Margaret Clark and Barbara Anderson (1967) found that high social interaction was correlated with high morale in all three subsamples. Psychiatric hospitalization was more dependent on a deficit of social supports and involvement than on only personal disturbance. At increased age, psychological depression occurred when social interaction was lessened due to poverty, illness, and decreasing energy. The mentally healthy replaced lost relationships by substitution.

While social engagement and psychological health were correlated, social withdrawal in the mentally ill was used to protect the self-concept from criticism. Maladaptation and social withdrawal were closely related but Clark and Anderson are not sure of the direction of the causal relationship.

The Cumming and Henry disengagement study is criticized for not including those in financial, physical, or mental stress. Disengagement, believe Clark and Anderson, may be a white, Midwestern American phenomenon, and as such should not claim universality. The decrease in social interaction Cumming and Henry found, might have stemmed from: 1) their non-representative sample which focused on the healthy and independent, 2) age-segregation in American society, and 3) the first two points plus a reduction in interaction caused by the death of friends and family.

Consciousness of the aging was found by Rose (1965) to be correlated with responses to aging. Significant differences were found between the aging conscious, who were aware of and identified with the aging subculture, and the non-aging conscious, who were unaware of and didn't identify with the aging subculture.

Leisure time activities, including leadership roles in the community and organizations, occurred more frequently among the aging conscious. Rose used this to support his contention that disengagement is not inevitable. No reduction in activity was desired by the aging conscious. Rose took this to mean that disengagement is not universally desired by the elderly. While the non-aging conscious include many who were not joiners of associations, the aging conscious have usually joined associations throughout their lives and find themselves more active in their later years than ever before.

Being forced out because of age was the most frequent reason for dropping out of organizations. Non-participation cannot be solely attributed to ill health, Rose found. While the non-aging conscious

were slightly older and in somewhat poorer health than the aging conscious, only 5.6 percent of the former said that poor health made them unable to leave the house.

Although an overwhelming majority in both groups were satisfied with their present lives, only 28 percent of the non-aging conscious compared to 54 percent of the aging conscious felt their lives were getting better. From these findings, Rose states that aging is more satisfying to the more active aging conscious.

Rose found that the aging conscious tended to interact with contemporaries more often than the non-aging conscious. Problems of aging are more often discussed by the aging conscious as are resentments against age discrimination, pride in old age, and demands of greater political participation by the elderly.

Basing their critique of disengagement on the Cornell Study of Occupational Retirement, Gordon Streib and Clement J. Schneider (1971) believe the disengagement theory is less a theory than a frame of reference or a theoretical orientation. Disengagement centers around sensitizing concepts instead of definitive concepts. One of the problems with disengagement is that it is confused with alienation which can be one facet of disengagement. In their study, Streib and Schneider found disengagement from work but there was little evidence of alienation. They state that Cumming and Henry confused the aging process with sociocultural and socioeconomic processes. Disengagement is fundamentally biosocial.

Because retirement is expected, Streib and Schneider believe it is not traumatic. With the translation of retirement into permission to

disengage, self-esteem can be preserved.

Another weakness of the disengagement theory, according to Streib and Schneider, is that those who retire, disengage from only one role--the work role. The disengagement theory assumes that work includes a stimulating component of social interaction. This may not be true; instead, workers may dislike both their work and their work situation.

Streib and Schneider propose differential disengagement as a more realistic explanation of withdrawal from roles. A person can vary the amount and rate of disengagement in his role set. There is also a possibility after retirement of new roles being added through leisure or citizenship and service roles.

Ida Harper Simpson, John C. McKinney, and Kurt W. Back (1966) discount earlier gerontological thought which saw the removal of a major and critical structural support for societal participation with retirement. At retirement, not all positions related to work are necessarily lost. Retirement must be studied within the larger context of previous and continuing social relationships. In particular, retirement may be expected to differ by occupational stratum.

Rural-Urban Differences

Rose (1967) believes that,to understand the contemporary rural elderly,three sets of sensitizing elements need to be considered: 1) those factors common to the elderly in American society at large, 2) contemporary factors of rural life, and 3) factors of rural life some sixty years ago when today's elderly were young.

Two social problems are associated with the first set of factors Rose mentions, which are those dealing with aging in the United States today: 1) the lack or loss of social roles, and 2) the youth emphasis of American society.

The lack or loss of social roles creates role ambiguity for many elderly. At retirement, this role ambiguity can include conflict within the family when the retired husband disrupts his wife's household routine. Rose believes this is less likely to occur in farm couples because farmers, being self-employed, can retire gradually, and thus have more time to adjust gracefully. This self-control over retirement may decrease retirement problems (including anxiety over retirement income).

The second social problem of contemporary American elderly is the youth emphasis. This emphasis may be so pervasive that the elderly, in some cases, may have a negative attitude toward themselves. Another aspect of this problem, according to Rose, is the exclusion of the elderly from many voluntary associations. Exceptions to this exclusion may be the church and senior citizen groups.

The second set of factors, characteristics of contemporary rural areas, includes a population imbalance created by the outmigration of the young to more urbanized areas. The population imbalance favoring the aged means they have a larger proportion of similar age cohort persons with whom to interact. This interaction may be drastically reduced if the individual does not have access to transportation. Another characteristic is the scarcity of medical facilities in the countryside. Rose feels that traveling to a medical center in an urban area not only puts the rural aged at an economic disadvantage but traveling may

discourage them because being with strangers creates anxiety. Rose believes the rural elderly may be subjected to less discrimination because rural voluntary associations are less age-graded than urban voluntary associations.

The third set of factors, consideration of rural areas sixty years ago, may be seen in the evident conservativism of today's elderly. Once it was thought that aging makes people conservative but this has never been proved. A better explanation would be that the elderly have always been conservative. Conservative attitudes among the rural elderly may be due to the occupational hardships of farming. Rose believes that future generations of rural aged may not be so conservative because of the financial improvements in farming and the influence of the mass media.

Rural occupations and retirement differ from those of urban dwellers. Ward W. Bauder and Jon A. Doerflinger (1967) see a certain heterogeneity among the rural population. Rural nonfarm workers retire at an earlier age than farmers. (Urban workers retire at ages intermediate to the rural nonfarm and farmer rates.) Rural retirement typically means a reduction in work load rather than the total cessation found in urban areas. Rural retirement is often more gradual than urban retirement.

According to Bauder and Doerflinger, it is not at all unusual for farmers to retire from the farm, move to the closest town and buy or start a small business to run in retirement. This pattern not only provides income but also brings the retiree closer to services which are thought vital in old age. There are economic as well as family

considerations involved when giving up the family farm. With these considerations, financial security of the aged parents is rarely achieved. In this situation, social security becomes important to the self-employed, specifically the farmer. The rental income which old farmers and small businessmen get is not necessarily penalized through lost or reduced social security benefits.

Rural businessmen and farmers may finance their retirement by refusing to replace worn equipment or depleted stocks. Bauder and Doerflinger state that there is an implication here that death will occur prior to total depletion of capital.

Farmers desire retirement at a younger age than sixty-five, state Bauder and Doerflinger. They see farming as less age-graded than urban occupations. Formal education is not necessarily as useful as experience in farming. Social interaction on the job is less with peers (as in urban occupations) than with family members who are in the business together. This family employment strengthens the work ethic and simultaneously reduces the tolerance for nonwork roles. Rural occupations have multiple roles. As he ages, the rural worker can drop the more strenuous roles in his role set. The surrendering of some of the work roles permits a type of semi-retirement while still retaining the prestige of the work role. Continuity of life-style is better preserved by gradual retirement.

Bauder and Doerflinger believe there is a more sympathetic understanding of retirement between the sexes in rural than in urban areas. They also saw greater support in retirement by children.

Retirement activities can include community participation. Walter C. McKain (1967) sees two values held widely in American society which influence community roles and activities of the elderly. The first is the importance of work as an end in itself. The second is the youth emphasis. Because many of the young don't work, leisure activities are oriented around younger generations. This extends to community roles which are usually given to the employed, i.e., the young.

Elderly people themselves distinguish between activities which are a means to an end, and activities which are ends in themselves, McKain believes. The former are proper if they are not just for the fulfillment of personal satisfaction but are somehow service-related. Activities which are ends in themselves, or recreational, have little esteem. There are three broad justifications for acceptable social participation: 1) educational, 2) healthy for the individual, and 3) serves the common interest.

Rural elderly, especially the farmer, have a greater advantage over urban elderly in that the farmer has been accustomed to unstructured activity throughout most of his occupational life. McKain sees structured work days as much more common among urban workers. In retirement, the rural may very well be better off simply because they have little fear of unstructured time and activity. Rural occupations have a further advantage over many urban occupations in that farming and nonfarm work require a variety of skills which can be helpful in retirement.

Rural social organizations tend to have diffuse goals and membership, McKain reports. Because there is a relative population scarcity, elderly people are less likely to run into as sharp age-grading as they do in

cities. Under these circumstances, withdrawal is less likely. Withdrawal is slowed or prevented by greater community knowledge of the individual elderly. Attitudes, interests, and problems of the aged may be known throughout the community.

On the other hand, McKain sees the work ethic as probably being more strongly held in rural than in urban areas. Idleness--even in retirement--is disparaged. Retirement activities are sought which look like work or some type of constructive effort. Deficiency of transportation can cut down on the activities of the elderly. Organized services specifically for the elderly are difficult to run because of the low population density. The outmigration of children may leave many elderly alone. They can reflect on their own childhood when an assortment of relatives lived in close proximity to each other; the comparison may lead to bitterness on the part of some of the rural aged.

Membership by the elderly in formal social organizations is reduced by prohibitive costs, transportation difficulties, poor health, and perhaps a lifelong attribute of being a non-joiner, states McKain. While many elderly do not participate in formal social organizations, others do join and attend events sponsored by such groups. Memberships and participation rates vary by organization. One type of organization rarely found in rural areas is the senior citizen club. While interest in religion increases in importance among the elderly, actual participation is not as widespread.

Fewer community activities among farmers than nonfarmers has been reported. Retirement status and socioeconomic status are important in explaining participation rates. McKain sees three reasons why a retired

person is in a good position to be in community service. First, the older person has experience. Second, the retiree has a great deal of free time. Third, the retiree has a detachment which comes with retirement.

McKain believes community service by the elderly fits into the work ethic. It is also an area where the elderly know as much or more than young people. The role of the elderly in community service may be either advisory or action-oriented. Those elderly who are active in community service usually are those who have always been active in this sphere.

Relinquishing interest in formal or community organizations usually means a decline in social interaction. While informal social interaction is important at all ages, McKain believes it is probably more important for the aged because of retirement and decreased participation in other activities as well as the increase in free time. McKain cites a California study, where certain traits were found among the elderly with high participation rates. The younger elderly (sixty-five to sixty-nine years of age) who were employed, healthy, well-educated, and who had lived in the community for seven years or more had higher formal and informal participation rates.

Work and retirement activities can be influenced by health and medical care. Bert L. Ellenbogen (1967) examines the myth of rural life as being healthier than urban life. It has been found that the rural are in many respects at a health disadvantage. The aged have lower incomes than the nonaged, and the rural aged have less income than most urban aged. Folk medicine is more strongly believed in the countryside,

particularly among the aged. Health care facilities are concentrated in cities. Not only must the rural elderly find medical care, but when they do know they have to travel to cities to get it, they may be discouraged by going to an unfamiliar environment. The lack of physicians in rural areas is made more acute by the type of rural physicians. Doctors in the countryside are older and are less likely to be specialists.

Ellenbogen further states that aged people may attribute illness or restrictions on aging rather than disease. They are less likely to report such diseases believing them to be natural for someone of their age. The aged farm population have a slightly higher tendency to restrict their activities because of health than do nonfarm aged.

Rural-urban comparisons of the elderly have been made by Youmans (1963) who has studied both groups.

The Youmans rural sample had an average of 5.5 years of schooling. Among the urban respondents the average years of schooling was 8.1. The urban had a median length of residence in the present community of 30 years. The rural median length of time in the present community was double the urban--60 years. Half of the rural were employed--primarily in farming. Among the urban, 42 percent were equally employed in white collar and manual occupations. Three-quarters of the rural were either fully or partly retired. Among the urban, 70 percent indicated they were either fully or partly retired. Rural men retired partially at younger ages than did the urban men. The rural men told Youmans that poor health was the most important reason in deciding retirement. The urban sample said they retired because of age, company policy, or the unavailability of work.

Youmans found health ailments were reported more frequently and at an earlier age for the rural than the urban sample. There was an inverse relationship between health and socioeconomic status in both the rural and urban samples. More rural respondents (72 percent) than urban (45 percent) said their activities had been restricted because of poor health. Age was cited more often for the decline than health among city residents. Role impairments in the sixty to sixty-four age group occurred among 75 percent of the rural men but only 27 percent of the urban men. An inverse relationship between role impairments and socioeconomic status was found. This relationship was much sharper among the rural respondents. Advancing age brought increased role impairments. Role impairments increased more dramatically with age than did failing health. Overall, the respondents appeared more aware of physical limitations than failing health per se.

The rural had more children and siblings than the urban sample, according to Youmans. Although more of the rural respondents lived with children, the rural sample had more children who had migrated farther away than the urban sample. Urban respondents more frequently lived with siblings but the urban sample had more siblings who had migrated farther away than the rural sample. In both samples, the elderly visited more frequently with children than with siblings although both sets of relatives lived at equal distances from the elderly. Visits with siblings and children were more common among the urban respondents. Youmans believes this is due to the more limited transportation and lower income of the rural sample.

Only a very slight reduction in active hobbies was found with advancing age. Gardening, visiting, hunting and fishing, and sports were the most frequently mentioned pastimes in both residential areas, states Youmans. Sports occurred more frequently in the city than in the rural county. Participation declined with age in both areas particularly in hunting, fishing, and sports.

Practically all (87 percent) of the sample was involved with the church. There was only a slight decrease in church activities with age. No residential differences were found by Youmans. This was the only community activity for a majority of the respondents, although there were a variety of other organizations named. These organizations listed by Youmans included senior citizen groups, occupational and professional organizations, fraternal organizations, and service or welfare groups.

Reductions by age in community organization participation was explained by Youmans by the smaller proportions of older rural men in farm organizations. Community organization participation rates showed no difference in the younger and older urban samples.

The most popular form of sociability was informal visiting which occurred slightly more often among the rural than the urban respondents. There was a higher incidence of helping relationships (respondents saying they helped others) in the rural sample. Advancing age decreased these helping relationships in both the city and countryside. Visiting declined with increasing age in both residential areas. Meetings and clubs were attended by more in the urban than rural sample. Almost half said social activity had declined since the age of fifty. This decline occurred more frequently among Youmans' rural respondents. Over a quarter

of both samples would have liked to get into activities they weren't in.

Stronger feelings of attachment to others in the community were found in the rural sample. These attachments declined with increasing age in the city but remained constant in the rural sample, states Youmans.

Youmans found that while there was no difference in the two samples of those who said they had difficulty using their free time, the rural were more likely to feel they could be more useful.

Pessimism--as a serious problem troubling the respondents--was more common among the rural sample. This negativism of the rural respondents included seeing fewer advantages in aging and a greater concern over health. Youmans found pessimism more common among the older, lower income, divorced and separated, and retired. The younger, financially better off, never married, married or widowed, and working were less pessimistic. Pessimism increased from age sixty-five and then decreased after age sixty-nine. An equal number in both samples saw finances as a major problem.

Few of the men (17 percent) wanted more opportunities for gainful employment. Youmans found there was a value in work besides financial for two-thirds of the sample. The non-economic value of work included respect gotten from others for working and working in order to be occupied. The lower the socioeconomic status the greater the percentage who felt people didn't respect those who didn't work. Rural and particularly older rural people felt work was respected by others. The same proportion of urban men at all ages felt work was respected by others. In a situation where one didn't need to work because he was financially well-off, more rural than urban, and a larger proportion of the older

(seventy-five years or more) than of the younger (sixty to sixty-four years) respondents believed it made sense to work anyway. There was no difference in attitudes toward working between high and low socioeconomic status groups.

Men of lower socioeconomic status were more likely to feel they needed more opportunities for gainful employment. This was somewhat offset by the rural men, usually of lower socioeconomic status than the urban men, who were less interested in gainful employment. Youmans believes this is caused by a realistic appraisal of the more limited employment prospects in the countryside and by an acceptance of a retired patriarch role. A declining interest in employment was noted with advancing age.

While disengagement from middle age roles was subscribed to by a majority of the men, many believed disengagement was not good for them. Youmans found this antipathy for disengagement was constant at all socioeconomic levels although the lower socioeconomic men were more agreeable to disengagement from the labor market. Rural men were also more ready to disengage from work than were urban men. Equal proportions of rural and urban respondents saw retirement as undesirable.

Retirement

Retirement is sometimes viewed by retirees and prospective retirees as depressive. Ill health, poverty, hostility toward retirement, and depression are some of the negative attributes identified with retirement. Empirical studies have contradicted some of these attributes.

Physical Effects

The health status of the rural elderly is discussed under Rural-Urban Differences. In particular, those portions dealing with Ellenbogen and Youmans involve the health of the rural elderly.

Streib and Schneider were interested in the effect of retirement on health because of a commonplace belief that retirement negatively influences health. Although poor health may lead to retirement, Streib and Schneider found that the majority of respondents did not feel retirement made any difference in their health. A sizeable minority of respondents claimed their health had improved since retirement. Only 6 percent of the respondents said that retirement had been inimical to their health.

Among those respondents still working but approaching retirement, an equal percentage felt their health would deteriorate or improve with retirement. Respondents in good health had a slightly greater tendency to remain employed throughout the study. Streib and Schneider found that those with longer work lives tended to feel retirement would be detrimental to their health.

Social and Psychological Effects

The social and psychological effects of retirement on the rural elderly are discussed under Rural-Urban Differences. In particular, those portions dealing with Rose, Bauder and Doerflinger, McKain, and Youmans involve the social and psychological effects of retirement on the rural elderly.

Simpson, McKinney, and Back believe that reactions to retirement may be expected to differ by occupational stratum. Reactions to retirement

may also vary within a stratum. Simpson, McKinney, and Back expect that the influence of the occupation will remain after retirement. While the actual work role itself may be lost at retirement, other roles stemming from the former occupation will be unaffected.

Streib and Schneider state that while a mandatory retirement age means that everyone must retire at that age whether or not they want to, many (46 percent) retired voluntarily in their study. Attitudes toward retirement--whether the respondent was classified as willing or reluctant--influenced frequency of retirement. The reluctant retirees were less likely to retire at sixty-five and less likely to remain permanently retired. In contrast, the voluntary retirees retired at age sixty-five and remained retired throughout the study. At the end of the study, 25 percent of the reluctant males remained working while only 8 percent of the willing males continued to be employed. Generally, the reluctant retirees retired later than the willing and were more likely to become re-employed.

Because 46 percent of the males retired willingly, Streib and Schneider question the importance of the Protestant work ethic. Differences in reaction to retirement were found among the occupational levels with the professionals the least willing to retire, followed by the middle class. The unskilled workers were the most eager for retirement.

Operationalizing the Protestant work ethic into feelings of uselessness (or usefulness), Streib and Schneider found that those who said they often or sometimes felt useless were more likely to retire early. The year in which they retired showed an increase in the percentage of respondents who had feelings of uselessness. Retirees tended to maintain

a greater feeling of uselessness in later years. No change was found from year to year among those who continued to work. Despite this correlation between retirement and feelings of uselessness, never more than 25 percent of the retired respondents attributed the feelings of uselessness to retirement. The majority of the respondents did not experience feelings of uselessness either prior to or after retirement. There was a correlation between length of work life and sentiments of uselessness brought on by retirement.

Streib and Schneider found that pre-retirement attitude toward retirement was more influential on adjustment than retirement per se. Those who retired later were less satisfied with retirement than earlier retirees. Between two-thirds and three-fourths of the retired said they had no difficulty with retirement. The negative pre-retirement attitude toward retirement was most evident in the respondents who worked throughout the study.

Respondents were asked by Streib and Schneider how old they felt. No differences in age identification (middle age, late middle age, old, elderly) were found between the working and the retired. Nor was any difference in age identification found among occupational levels. Those working respondents who felt retirement would make them feel older had a greater tendency to work throughout the study.

Questions dealing with the influence of retirement on feelings of life satisfaction revealed that the working tended to overestimate retirement as depressive in the Streib and Schneider study. Retirement did not have any negative influence on life satisfaction. There was a relationship between those who believed retirement would cause a decline

in life satisfaction and length of work life.

Financial Effects

For a discussion of the rural retired and finances, see the discussion under Rural-Urban Differences. In particular, Rose, Bauder and Doerflinger discuss the financial effects of retirement on the rural elderly.

Streib and Schneider's retirees experienced an average decline in retirement income of 56 percent. Despite this, between a quarter and a third of the retirees said that their standard of living was better in retirement than during most of their lives. There was an indication that financial worries preceded retirement but were found unjustified after retirement. Those who felt their income was adequate were most likely to retire at sixty-five. The lower income males tended to retire later. There was no difference in the proportion of the retired and those who worked throughout the study who worried about finances.

Simpson, McKinney, and Back defined income deprivation as a retirement income of less than 50 percent of the former employment income. It was found that job deprivation in the middle stratum is caused equally by decreased social involvement and financial deprivation. In the semi-skilled stratum, job deprivation is caused primarily by financial deprivation.

Work/Class Background

In their study of retirement, Simpson, McKinney, and Back review structural characteristics of three occupational levels--the upper-white-collar, the middle, and the semi-skilled. The structural characteristics include: job autonomy, job prestige, and occupational culture. A

personal characteristic, orderliness of work history (or work career) is another variable differing within and between occupational strata. All of these characteristics--job autonomy, job prestige, occupational culture, and orderliness of work history--influence retirement.

Job autonomy is positively related to class position. The upper-white-collar workers, employed in prestigious occupations, have the greatest job autonomy, followed by the middle stratum. The least job autonomy is among the semi-skilled. Simpson, McKinney, and Back comment that the highly skilled tasks performed by the upper-white-collar occupations and the responsibility this entails requires job autonomy. Job autonomy may be seen as intrinsic to prestigious occupations.

Prestigious jobs tend to have an occupational culture. Simpson, McKinney, and Back define occupational culture as expected behavior of an occupational group or stratum. These expectations include behavior on and off the job. There is a positive relation between job prestige and the presence of an occupational culture. The lower two strata have a greater turnover of personnel which makes development of an occupational culture difficult. Simpson, McKinney, and Back believe that job autonomy is associated with the development of an occupational culture.

The last variable, orderliness of work history, is positively related to occupational stratum. Those with an orderly work history will have had a steady progression with either consistent vertical or horizontal mobility. Many disorderly workers in an occupation tend to discourage an occupational culture. Simpson, McKinney, and Back believe an orderly work career is accorded some prestige in its own right.

Previous studies have shown that occupational level is positively correlated with pre-retirement social involvement. This social involvement includes:

> . . . membership in or attendance of meetings of voluntary associations, number and type of social organizations participated in, voting behavior, and reading habits. (Simpson, McKinney, and Back, 1966:55-56)

The other important variable in pre-retirement social involvement, besides occupational level, is orderliness of work history: the more orderly the work history, the greater the probability of involvement, according to Simpson, McKinney, and Back.

Community organizations seek prestigious, i.e., high level or orderly, workers. Further encouragement for community involvement is offered by occupational norms. Those workers who have orderly histories are most likely to be involved in the community because such workers tend to share occupational norms, state Simpson, McKinney, and Back.

The prestige of the job influences what type of social involvement will be engaged in. While members of the upper-white-collar and middle strata may both have orderly work careers and occupational cultures, Simpson, McKinney, and Back believe these two strata will attract different voluntary associations.

While the actual work role may be lost at retirement, other roles stemming from the former occupation will be unaffected. Simpson, McKinney, and Back expect that the influence of orderliness on the career and the occupational culture will remain after retirement.

Simpson, McKinney, and Back use feelings of job deprivation and general morale to establish the self-evaluation measure. There is an

inverse relation between job prestige and job deprivation. A positive relation exists between job prestige and morale. Retirees with orderly work histories tend to have little job deprivation and higher general morale than those with disorderly work careers.

Among retirees with disorderly work histories, job deprivation is sharply reduced by high social involvement. High involvement in retirement is positively related to status and orderliness. There is an inverse relation between job deprivation and level of social involvement. Pre-retirement social involvement is not related to either morale or job deprivation. Post-retirement loss of friends is not strata-differentiated, according to Simpson, McKinney, and Back.

The most eager for retirement is the middle stratum followed by the semi-skilled. The upper-white-collar stratum is the least eager for retirement, state Simpson, McKinney, and Back. Orientation toward work is measured by 1) work commitment, and 2) job satisfaction derived through the intrinsic aspects of work. There is a positive relation between occupational status and retirees who find the intrinsic aspects of work the most satisfying. There is a positive relation between work commitment and occupational status.

Job deprivation, but not morale, can be predicted from retirement orientation, state Simpson, McKinney, and Back. There is an inverse relation between retirement orientation (favorable or unfavorable) and job deprivation. Those with a favorable orientation toward retirement coupled with extrinsic job satisfaction have less job deprivation than those who have intrinsic job satisfaction. Those who approach retirement unfavorably and who have intrinsic job satisfaction are more likely

than those respondents who have extrinsic job satisfaction to feel little job deprivation.

A less favorable retirement attitude is felt by those who are classified as having income deprivation. Simpson, McKinney, and Back define a retirement income of less than 50 percent of the former employment income as income deprivation.

Acceptance of retirement may depend on whether work activities are similar to retirement activities. While retirement is a transitional period like others, it differs in that it is the first time there is a diminution of life space. Simpson, McKinney, and Back point out that retirement also lacks set patterns to guide the retiree.

The skills the retiree learns for his occupation may be carried over into retirement. Simpson, McKinney, and Back classify skills into what they manipulate--symbols, people, or things.

Comparison of the former occupation's work object and the object retirement activities revolve around show that both share the same object at least as frequently or more frequently than different objects. The thing-manipulators tend to orient retirement activities around things. Simpson, McKinney, and Back believe that manipulation of things for an occupation may restrict developing other interests. There is a positive correlation between occupational status and the daily number of retirement activities.

A continuous style of activity has the same emphasis in retirement as in the occupation. There are some retirees whose retirement activities do not center on the same object as their occupations. This is a discontinuous style, Simpson, McKinney, and Back comment. Continuous style is

influenced by work commitment and length of retirement.

Within different occupational strata, work commitment means different things. The strata differ on the effect of work commitment and continuity. Simpson, McKinney, and Back state that in retirement, high work commitment is maintained through identification with the former occupation. This self-identification is reinforced by community recognition of the retiree by his former occupation.

Semi-Skilled Stratum

Lowest job satisfaction is found in the semi-skilled occupations and its origin is primarily economic. In this stratum, whatever occupational norms develop center around work itself rather than the occupation, Simpson, McKinney, and Back believe. The limited skills required and small amount of job autonomy further decrease the likelihood of occupational norms. Because semi-skilled jobs have low prestige, the workers are not sought out by many community organizations. Because this stratum is characterized by disorderly work careers within an occupation lacking a culture, lower stratum members are unlikely to be socially involved.

Semi-skilled retirees are least likely to be highly involved, although they are intermediate in pre-retirement involvement loss, state Simpson, McKinney, and Back.

Because the semi-skilled retirees are the most likely to have high job deprivation and because there is an inconsistent relation among the semi-skilled retirees between level of involvement and job deprivation, Simpson, McKinney, and Back feel semi-skilled job deprivation is different from job deprivation in the higher strata. In the semi-skilled stratum, job deprivation is caused primarily by financial deprivation. There is a

relation between high income deprivation and unfavorable retirement orientation among the semi-skilled.

Simpson, McKinney, and Back examine retirement orientation (favorable or unfavorable) and work orientation (work commitment, and source of work satisfaction). The semi-skilled stratum is intermediate in eagerness for retirement. They have the fewest number of retirees who were committed to work and are the least likely to name the intrinsic aspects of work as the most satisfying. A positive relation exists between work commitment and retirement orientation.

If there is a favorable orientation toward retirement, semi-skilled retirees with high work commitment are more likely than those with low work commitment to experience little job deprivation. Current morale and pre-retirement orientation are positively related. Semi-skilled retirees are the most likely to have low morale, Simpson, McKinney, and Back report.

All semi-skilled respondents in the Simpson, McKinney, and Back study manipulated things in their work. In retirement, they orient activities around things. They have the fewest number of daily retirement activities. The most active semi-skilled retirees are those who have high work commitment ratings. Continuity is positively associated with work commitment. Simpson, McKinney, and Back believe that the semi-skilled retiree has no alternative but the job skill in retirement because of the limitations of his education and job. Among the semi-skilled, continuity declines with duration of retirement; although a sizeable proportion of long-time retirees maintain continuity. A discontinuous style is related to little job deprivation.

Middle Stratum

Middle stratum workers (clerks, salesmen, skilled workers, and foremen) are intermediate in job autonomy, job prestige, number of orderly work careers, job satisfaction, and degree of required occupational skills. Simpson, McKinney, and Back comment that there may be some encouragement for community participation through occupational norms.

The least pre-retirement social involvement loss is in the middle stratum. While less loss is sustained by the orderly, rather than the disorderly, Simpson, McKinney, and Back advise caution in accepting orderliness as associated with little involvement loss because the hypothesis could only be tested in the middle stratum. This stratum is intermediate in post-retirement social involvement.

The middle stratum is intermediate in self-evaluation (job deprivation and general morale), Simpson, McKinney, and Back report. Middle stratum retirees with high involvement tend to have low job deprivation scores. When loss of involvement is controlled, the higher the status within the middle stratum, the less the job deprivation. Job deprivation is caused equally by decreased social involvement and financial deprivation.

The middle stratum is the most eager for retirement and is intermediate on work commitment and job satisfaction ratings. This stratum has an inverse relation between work commitment and desire for retirement. There is no relation between job satisfaction and desire for retirement. Largely absent from this stratum is work commitment and financial worries; Simpson, McKinney, and Back believe middle stratum retirement is more dependent on personal variables than on work commitment or finances.

If there is a favorable orientation toward retirement, middle stratum retirees with little work commitment are more likely than those who have high work commitment to experience little job deprivation. If there is an unfavorable orientation toward retirement, less job deprivation is felt by those with low work commitment than those with high work commitment, Simpson, McKinney, and Back state.

Among the middle stratum, 55.7 percent manipulate things, 19 percent manipulate symbols, and 26.2 percent manipulate people, according to Simpson, McKinney, and Back.

Among those who occupationally manipulate people, there is a greater variety of retirement activities. The middle stratum is intermediate in the number of daily retirement activities. Within this stratum, the symbol-manipulators are most active, followed by the people-manipulators. The thing-manipulators are the least active, report Simpson, McKinney, and Back.

Continuity in this stratum is associated with low work commitment. Duration of retirement has no effect on continuity. Simpson, McKinney, and Back state that those who have continuous style miss their work less than those who maintain discontinuous styles. High morale is associated with continuity.

The highly work committed middle stratum retiree has less of an opportunity than the upper-white-collar retiree to maintain his occupational identification in retirement. Because of this, other activities are substituted or he becomes inactive, state Simpson, McKinney, and Back.

Upper-white-collar Stratum

Upper-white-collar workers (executives, professionals, and government officials) have the greatest work satisfaction in the Simpson, McKinney, and Back study. This satisfaction comes through holding prestigious jobs with considerable job autonomy. The occupational culture encourages social participation during nonwork hours. Because the upper-white-collar stratum is characterized by orderly work careers and an encouraging occupational culture, these members are expected to be socially involved. The job prestige of these workers makes them highly desirable to voluntary associations and community organizations.

Simpson, McKinney, and Back state that the greatest loss of involvement is in the upper-white-collar stratum and is due to the drop in work-related organizational memberships after retirement. More organizational memberships but fewer interests are lost by the upper-white-collar stratum in comparison with the other two strata; hence the extent of loss is least in this stratum. A high level of involvement is associated with low job deprivation in retirement. In fact, there were no low involvement upper-white-collar respondents.

Upper-white-collar respondents have the least job deprivation and are more likely to have high morale. High involvement upper-white-collar retirees who retain their involvement after retirement have low job deprivation, report Simpson, McKinney, and Back.

The upper-white-collar retirees are most reluctant for retirement. They are the most highly work committed, Simpson, McKinney, and Back report. They evidenced an inverse relation between work commitment and retirement orientation. Another inverse relation is between source of

work satisfaction and retirement orientation. A positive relation exists between achievement of ambitions and retirement orientation.

Work-centered orientations (work commitment, work as a main source of satisfaction, and achievement of work ambitions) occurred concomitant with reluctance to retire among the upper-white-collar stratum. Because some respondents look forward to retirement and yet maintain work-centered orientations, Simpson, McKinney, and Back feel other nonwork orientations are present.

If there is a favorable orientation toward retirement, upper-white-collar retirees with little work commitment are more likely than those who have high work commitment to experience little job deprivation. If there is an unfavorable orientation toward retirement, less job deprivation is felt by those with high work commitment than those with low work commitment, state Simpson, McKinney, and Back.

Half of the upper-white-collar retirees manipulate symbols while the remaining half manipulate people, report Simpson, McKinney, and Back. The people-manipulators in this stratum have the greatest variety of retirement activities. In general, the upper-white-collar stratum has the largest number of daily retirement activities. Within this stratum, the people-manipulators have more activities than the symbol-manipulators.

Continuity in this stratum is positively associated with work commitment, report Simpson, McKinney, and Back. Continuity declines with duration of retirement; although there is a sizeable proportion of long-time retirees who maintain continuity. Discontinuous style is positively related to little job deprivation. High morale is associated with continuity.

Chapter III

Methodology

This thesis challenges disengagement as a universal phenomenon. Retirement may not lead to decreasing social involvement for all. Some retirees may maintain or increase their involvement after retirement. Rural-urban and class differences in disengagement and re-engagement are of particular importance. This chapter presents the hypotheses to be tested, the sampling procedure used, the definition of pertinent terms, and a description of the interview instrument.

Hypotheses

Eight hypotheses will be tested. In each hypothesis the independent variable is either location (rural or urban) or class (lower-middle, middle-middle, or upper-middle). The dependent variables are general re-engagement, re-employment, reasons for re-employment, and re-engagement through voluntary associations.

Hypothesis 1: Re-engagement is more likely to occur in the urban sample than in the rural.

Because of the smallness of the community, rural work and retirement patterns, age-integrated associations, and the strength of the Protestant work ethic, disengagement is less likely to occur in rural areas than in urban. Without disengagement, re-engagement cannot occur.

In rural areas, there is an outmigration of the young. Rose points out that this outmigration provides a potentially wide circle of elderly contemporaries to interact with. The smallness of the rural community

fosters wide community knowledge of the abilities and needs of the individual elderly person. Because of this community knowledge, unwanted social withdrawal can be reduced or eliminated.

Stronger feelings of attachment to others in the community occurs more frequently in rural than urban areas, says Youmans. Furthermore, these attachments among the rural remain stable whereas the number of attachments decline with age in the city. Youmans found informal visiting to be more common in the rural than in the urban sample. Rural elderly were more likely to be the benefactor in a helping relationship than urban elderly. Informal community activities were participated in more frequently by the rural elderly.

In rural areas, work and retirement differ from urban areas. Greater self-control over retirement is possible because of widespread self-employment in rural areas, notes Rose.

Rural businesses are often run by families which tends to reinforce the work ethic, making total retirement an unattractive status, believe Bauder and Doerflinger. Rural retirement typically means a reduction in work load rather than the total cessation of work. Retiring farmers often sell their farms, move into town, and start or work in a small business. Rural occupations, particularly agriculture, have multiple roles. A kind of semi-retirement which retains the prestige of the work role can be achieved by surrendering the more arduous work roles in a multiple work role set.

McKain notes that free-time activities which are educational, healthy, or service-related are acceptable to the elderly rural individual. Sheer recreational activities have much less value in the opinion

of many elderly. Rural occupations, particularly agriculture, require a variety of skills which can be utilized in retirement.

While voluntary associations specifically for the elderly are located almost exclusively in cities, rural voluntary associations are relatively age-integrated due to the scarcity of human resources in the countryside, notes Rose. This participation by the rural elderly in associations may continue past ages at which the urban elderly have been excluded.

McKain believes that the diffuse goals of rural voluntary associations encourage the elderly to continue their participation.

Hypothesis 2: Re-engagement will occur least frequently in the urban lower-middle class (semi-skilled).

Lower-middle class re-engagement will be infrequent because this class has fewer opportunities and/or motivations to become re-engaged. The development of leisure interests for retirement occurs most successfully if that leisure interest has been of long (pre-retirement) duration. Long-term leisure interest in the lower-middle class is inhibited by a lack of education, motivation, and financial resources. The often physically taxing characteristics of lower-middle class occupations discourages lively leisure activities during the working years.

Simpson, McKinney, and Back found that memberships in voluntary associations is uncommon in the lower-middle class. Most lower-middle class occupations do not emphasize community participation for their members. This is partly due to the low prestige of the job which discourages the worker from identifying with his occupation and partly to a disinterest by community organizations to enlist lower-middle calss people.

While the lower-middle class was intermediate (between the middle-middle and the upper-white-collar strata) in eagerness to retire, the work satisfaction and work commitment scores of this class were the lowest, according to Simpson, McKinney, and Back.

Unskilled workers were next to the least willing to retire in Streib and Schneider's study. The lower income males tended to remain working longer.

Hypothesis 3: The re-engagement which does occur in the lower-middle class (semi-skilled) is most likely to be re-employment for financial remuneration.

Low salaries are typical of lower-middle class occupations; hence, an individual may not have been able to save money for retirement. The low salaries of this class are reflected in social security benefits which are graduated to the income of the working years. Some individuals may not be eligible for social security benefits. Pensions and private insurance providing payment during retirement are scarce in this class. Re-engagement via re-employment may be forced in an economically deprived situation, for instance, ill health or heavy family responsibilities.

Simpson, McKinney, and Back found high job deprivation among lower-middle class retirees. Financial deprivation was the primary cause of this high job deprivation. In addition, a positive relationship between income deprivation and retirement orientation (favorable or unfavorable) was found in this class.

Streib and Schneider found that respondents who felt their income inadequate were less likely to retire at sixty-five. Lower income males tended to retire later. Subjective economic deprivation existed among those retirees who returned to work.

Hypothesis 4: Re-engagement is most likely to occur in the upper-middle class.

Re-engagement is most likely to occur in the upper-middle class because the occupational culture has encouraged community participation. A retiree in this class may maintain or expand his community interests after retirement.

Education for upper-white-collar occupations permits knowledge of and interest in a broad range of activities. Interpersonal skills, often utilized in the daily work situation, place the retiree in an advantageous position after retirement when roles tend to shift from the instrumental to the socio-emotional.

Larger salaries and a high probability of pension or private insurance income assure the upper-middle class retiree more financial resources for his leisure interests.

Streib and Schneider found that the better educated the individual, the less willing he was to retire. Professionals were both the least willing to retire and the most satisfied with retirement. They were also the most likely stratum to become re-employed. Those retired respondents who returned to work saw work as a major satisfaction in their lives. Streib and Schneider believe additional voluntary roles via leisure or citizenship or service organizations are more likely to be held by the better educated.

Due to job prestige, job autonomy, and orderly work careers, an occupational culture encouraging community participation is found in the upper-white-collar class. While work might be missed most by these retirees, they have had interests in the community which may assume great importance in retirement, believe Simpson, McKinney, and Back.

The upper-white-collar workers were the least eager of three classes to retire, Simpson, McKinney, and Back found. These workers found the intrinsic aspects of work to be most satisfying. They had the highest ratings of work commitment with desire for retirement inversely related to work commitment. They also had an inverse relation between desire for retirement and intrinsic satisfaction of the job. Attitude toward retirement (favorable or unfavorable) was inversely related to work commitment.

The upper-middle class was found to be equally divided between occupations which manipulated symbols and occupations which manipulated people. The greatest variety of post-retirement activities was among those who had occupationally manipulated people. The upper-middle class people-manipulators had the greatest number of daily activities. Identification with the former occupation was believed by Simpson, McKinney, and Back to be most prevalent in this class.

Hypothesis 5: Re-employment for sociability will occur most frequently in the lower-middle class.

Re-employment for sociability will occur most frequently in the lower-middle class because of a lack of alternative sociability opportunities. Hypothesis 3 stated that re-employment for financial remuneration will occur most frequently in the lower-middle class. Regardless of whether re-employment is for financial remuneration, being re-employed means increasing social interaction through the addition of the work role.

Simpson, McKinney, and Back's research produced a number of relevant findings. When occupationally-related associations were controlled, the lower-middle class lost the most pre-retirement social involvement.

Retirees in this class had low post-retirement social involvement. Lower-middle class retirees with little social involvement tended to have high job deprivation scores and low morale. Job deprivation in this class was caused primarily by financial deprivation. Work commitment and work satisfaction were the least in the lower-middle class. Intrinsic aspects of work were the least satisfying in this class.

Simpson, McKinney, and Back state that lower-middle class occupations manipulate things, and this was carried over into retirement where activities for this class centered around things. There is a suggestion that occupations which manipulate things restrict the development of interests in other areas. Semi-skilled workers had the fewest daily retirement activities of any class or category of object-manipulators.

Hypothesis 6: Re-engagement through voluntary associations will be most likely to occur within the middle-middle class (clerical, sales, and skilled workers).

This hypothesis is based on the prevalence of voluntary associations open to the middle-middle class. There are a variety of possible voluntary associations composed of middle-middle class members. Occupational or professional groups, fraternal organizations, civic and patriotic, political and intellectual groups are accessible to these people. This class has the education and often the finances necessary to belong to these associations. The occupational culture of many middle-middle class jobs offers some encouragement for non-work social participation through its occupational culture.

Simpson, McKinney, and Back say that community organizations seek out those with occupational prestige and orderly work histories--both attributes of some of the middle-middle class. The greatest variety of

community participation within a class is in the middle-middle class. Voluntary associations may be attracted to both the upper-middle and the middle-middle class workers but the two classes attract different voluntary associations.

Of three classes, the middle-middle class retirees lost the least of their pre-retirement involvement. These retirees were found by Simpson, McKinney, and Back to be intermediate in their post-retirement social involvement. Post-retirement social involvement was inversely related to job deprivation in this class. Retirement orientation was inversely related to job deprivation in the middle-middle class. Feelings of job deprivation in this class were caused by decreasing social involvement and financial deprivation.

Of the three classes, Simpson, McKinney, and Back discovered that the middle-middle class was the most eager for retirement. This class had an inverse relation between work commitment and desire for retirement. The middle-middle class was intermediate both on ratings of work satisfaction and in identifying the intrinsic aspects of work as the most satisfying.

Over half of the middle-middle class held thing-manipulating occupations in the Simpson, McKinney, and Back study. The second most frequent object manipulated in this class was people. Symbol-manipulators occurred least frequently. A greater variety of retirement activities was found among those who had manipulated people. The greatest number of daily retirement activities within the middle-middle class was found among the symbol-manipulators, followed by the people-manipulators. Retired middle-middle class thing-manipulators tended to be involved in

thing-oriented activities. These retired thing-manipulators had the lowest daily rate within this class. Continuity did not decline with duration of retirement. Highly work committed middle-middle class retirees either substituted other activities or became inactive.

Hypothesis 7: Re-engagement through voluntary associations is most likely to occur in the upper-middle class (professionals and executives).

Within this class, there are strong expectations of community involvement. In particular, members of this class are active in civic organizations. This expectation of involvement is held by those within the class as well as those not in this class.

The education and income of this class is more than sufficient, in many instances, to permit participation in several organizations. There is, as a part of the occupational socialization, a tendency to value productiveness. In retirement, this productiveness can be maintained through non-work activity. Service to the community is very much in line with the desire to be productive.

The formal education permits interest in artistic and intellectual groups. Art, music, history, and literature can be supported through board memberships of museums, libraries, schools, and other cultural institutions.

For further empirical support of this hypothesis see the discussion of Hypothesis 4.

Hypothesis 8: Re-engagement through senior citizen groups is most likely to occur within the middle-middle class (clerical, sales, and skilled workers).

Senior citizen groups are important in this thesis because they are the only organizations a younger person does not join and then continue past retirement. An elderly individual joining or participating in a

senior citizen group is clearly seeking engagement.

As noted previously (under the discussion of Hypothesis 6),the middle-middle class is involved in a variety of voluntary associations. Senior citizen groups are formed for both recreational and instrumental purposes. The recreational purpose is manifested in discussion, projects, trips, etc., which are organized by the group for its members. The instrumental purpose can be manifested through lobbying for measures advantageous to the elderly, such as lower movie ticket rates or lower rates for public transportation.

Sampling and Data Collection

The sampling and data collection procedures differed between the rural and urban samples. First, there will be a description of the main and comparison samples. Then the rural and urban sampling and data collection procedures will be outlined.

Two samples, one rural, and one urban, each with thirty-five respondents were planned. In practice, the study ended with four samples. The two largest were the rural and urban main samples as originally proposed. Data from urban and rural comparison groups were also collected.

The difference between the main samples and the comparison samples was the main samples fit the criteria for the study. These criteria included white male respondents of sixty years of age or older who had been retired for a minumum of two years.

The comparison samples were composed of respondents who did not fit the criteria. Specifically, those in the comparison samples were younger, had never been retired, or had been retired for less than two years. The first interviewing was conducted among the rural respondents.

To get these rural interviews entailed some traveling--approximately forty miles round trip. Those rural respondents who did not fit the criteria were included in the study because of the distance and time involved in getting the interviews. Later, during the urban interviewing, some urban respondents were included who did not fit the criteria.

Rural Sample and Data Collection

The rural sample was drawn from Rockingham County, North Carolina because Guilford County, the site of the University of North Carolina at Greensboro and the urban sample, had no rural areas according to the definition of rural used by the United States Census Bureau.

In 1970, Rockingham County had a population of 72,402. The Agricultural Stabilization and Conservation Service (ASCS) in Reidsville was contacted. (Reidsville is the county seat of Rockingham County.) After checking with the state ASCS office, the Reidsville ASCS office was permitted to give out names and addresses of farmers. The Reidsville ASCS office was prohibited by the state ASCS office to release phone numbers. All farm owners, operators, and tenants in Rockingham County are listed in the Reidsville ASCS office. The director of the Reidsville office suggested that the farm owners tended to be older than either the farm operators or tenants; because of this, it was decided to interview the farm owners.

At first every twentieth name of a farm owner was selected. Most of these farmers were situated along the major North-South route in the eastern part of the county. This first list included forty-six names. Later twenty-four names were selected from the vicinity of the major North-South route in the western part of the county.

Letters were sent to all prospective respondents on University of North Carolina at Greensboro Department of Sociology stationery. (See the Appendix for a sample letter.) The purpose of the study, the selection process, and a request for an interview were noted. In addition, the ASCS office was mentioned in the paragraph on the selection process. Prospective respondents were told in the letter that the interviewer would telephone them approximately one week after receiving the letter. Some prospective respondents had to be dropped because they had no telephone.

The final status of the rural respondents and prospective respondents was as follows:

rural sample interviews	36
comparison interviews	6
refusals	10
too young/not retired	8
potential respondents not located because of phone or address complications	9
deceased	1

Refusals in the rural sample were based on lack of interest or illness. Because the ASCS office was prohibited from giving out phone numbers, some respondents were not located at all. The interviewer did not try to contact these potential respondents who did not have telephones. This was necessary because directions to the respondent's home or business were obtained over the telephone during the request for an interview.

The second list (those potential respondents living in the western part of the county) produced greater difficulties in contacting respondents. Phone numbers for some of these potential respondents were incorrect; phones were disconnected, or out of service. Telephone operators were called for corrected phone numbers but they either had no

corrected numbers, or in some cases, they had no listing of the potential respondents. The ASCS office staff, when informed of these difficulties, had no explanation and seemed surprised.

A further problem with the second list was that the interviewer ran across suspicion toward the interview and/or study. The interviewer was told by some respondents that there had been some problems with people posing as salesmen. In one case, the interviewer was told, a robbery attributed to some "salesmen" had been committed against an elderly woman.

Refusals were much less frequent in the rural sample than the urban. The interviewer attributed this to the support given to the study by the ASCS office staff. The interviewer was told by an ASCS staff member that some of the respondents had phoned to get more information and to be assured that the study was legitimate. The staff members encouraged them to participate. To the interviewer's knowledge, everyone who called the ASCS office agreed to be interviewed.

In all but perhaps six cases, the interviews took place in the homes of the respondents. Without exception the respondents were extremely cordial and helpful. Many volunteered retired friends who might be interviewed. Most were very interested in the study, and they were interested, in particular, with retirement, aging, and medical care for the elderly. The respondents also took a lively interest in the interviewer and her career plans.

The total number of main sample rural respondents was thirty-six.

Urban Sample and Data Collection

The city of Greensboro, North Carolina was the source of the urban respondents. In 1970, Greensboro was a city of 144,259 population.

The census tracts of Greensboro were consulted. These tracts were broken down into age groupings by the Census Bureau. All tracts of more than 50 percent elderly were noted. (The Census Bureau defined elderly in the census tracts as anyone sixty-two years of age or older.) The streets in these census tracts were located on a city map.

The 1975 Greensboro city directory was used to select the names of potential respondents. At first every twentieth male name or first-initialed name was drawn. The first listing of names had been exhausted without fulfilling the thirty-five desired interviews. In a second drawing of names from the city directory, every male name or first-initialed name on the original streets was selected.

Every person with a listed telephone number received a letter on the University of North Carolina at Greensboro Department of Sociology stationery. (See the Appendix for a copy of the letter.) The letter explained the purpose of the study, the selection process, and requested an interview appointment to be made by the interviewer phoning the person one week after receiving the letter.

No attempt was made to contact (through the mail) potential respondents who didn't own a phone. All interview appointments were made by telephone calls. It was thought by the interviewer that time would be wasted in trying to get interviews by just showing up at a potential respondent's house without first getting permission to conduct the interview.

The urban interview and non-interview rate was broken down as follows:

urban sample interviews	22
comparison interviews	4
too young/not retired	118
refusals but fit criteria	48
no phone	136
deceased	11
female	10
black retired	2
moved	3
fit criteria, interviewer refused	1

Several times someone else refused for the prospective respondent claiming the prospective respondent was too ill to be interviewed. Names of friends who were retired were sometimes volunteered by both those respondents who were interviewed as well as those who were not interviewed.

The much higher refusal rate among the urban sample than the rural sample may have been due to the lack of a "sponsoring agency" in Greensboro. Although the pre-interview letters were typed on University of North Carolina at Greensboro Department of Sociology stationery and this connection was emphasized in subsequent phone calls, many in the urban sample seemed suspicious.

The current (1975) Greensboro city directory was used to draw the names of potential respondents; however, some names were drawn of men who had died since the information for the directory had been gathered.

Few if any elderly were living on some streets. The wife of a prospective respondent, explaining that her husband was in his forties and still working, offered an explanation for this. She said that ten years ago she and her husband were the youngest adults on their street. The residents had changed so that now (1976) she and her husband were the

oldest couple on their street. The change must have occurred between collection of the census data and the interviewing for this study.

Ten females were inadvertently included in the potential sample. These females were drawn from the city directory either because they had masculine names or because they were listed by their initials instead of a first name.

Of the forty-eight potential respondents who fit the criteria but who refused to be interviewed, most said they were ill. The reasons given for refusing to be interviewed were as follows:

gave no reason for refusal	32
illness	13
invasion of privacy	1
too busy	1
too much on his mind	1

The interviewer read the obituaries in a Greensboro newspaper. Half a dozen or so of those who because of illness refused to be interviewed died. Another potential respondent was admitted to a local hospital.

The total number of urban respondents in the main sample was twenty-two.

Operational Definitions

The operational definitions presented below are the original ones with notations made to later changes. "Rural" was defined more broadly. "Social life space" was dropped as a measure because of its statistical insignificance. The "disengagement," "re-engagement," and "role count" definitions are of crucial importance in this study.

Disengagement: the loss of roles and social life space due to social, psychological, and physical changes as one ages. The widespread

existence of mandatory retirement translates into the deletion of one role, that of worker, and its accompanying social life space. The differences in the number of roles as well as in the social life space was ascertained. A drop in role count (this term is defined below) or social life space (this term, too, is defined below) from pre-retirement to post-retirement was considered disengagement. This decrease in role count and social life space may continue from the pre-retirement stage through the post-retirement stage to the current stage. This, too, was considered disengagement.

Re-engagement: an increase in the role count or social life space after disengagement has occurred. Re-engagement was determined by comparing the role count and social life space of the post-retirement period to that of the current period. An increase was considered re-engagement. A decrease was considered continued isolation, or disengagement. No change was evidence that the individual had stabilized his disengagement.

Rural: the United States Bureau of the Census defines "rural" as an unincorporated place with a population of less than 2,500. Originally this definition was to be used in locating rural respondents. In practice, many retired farmers lived in incorporated communities or in towns of more than 2,500. The operational definition of rural was expanded to include all prospective respondents listed in the Reidsville Agricultural Stabilization and Conservation Service office.

Urban: the United States Bureau of the Census defines "urban" as any incorporated place or any place with a population of 2,500 or larger. Operationally, all the urban respondents were drawn from Greensboro, North Carolina which had a population of 144,259 according to the 1970 census.

Former occupation: the major or lifelong occupation of the respondent. This was determined by the respondent's own evaluation of his occupation.

Social class: calculated from the Hollingshead Two Factor Index of Social Position. The two determinants of social class were education and occupation. There was some difficulty in assigning the occupation of the retired farmers because Hollingshead had several separate grades depending on the size and value of the farm. During the interview, the rural respondents were asked how many acres they owned. Unfortunately this did not give a clear and complete evaluation of the land's worth or the farmer's total possible resources.

Occupational culture: included the skills learned for the job as well as the norms and expectations of those both within and outside of an occupation (Simpson, McKinney, and Back, 1966). For instance, there is an expectation that well-educated people will be active in community affairs. Occupational cultures differ in their expectations of attitude and behavior of off-duty workers, and this may influence the retiree in his retirement life style. This may possibly include the retiree's desire or ability to continue working after a first retirement.

Current income level: asked of all the respondents because many retirees experience a large drop in income after retirement. The annual pre-retirement income was also obtained. For many workers, particularly in urban areas, the greatest income was received in the few years prior to retirement. For both the interview schedule and the coding of the data the following categories were used for the pre-retirement income and the current income:

1. $0 - $2,999
2. $3,000 - $5,999
3. $6,000 - $8,999
4. $9,000 - $11,999
5. $12,000 - $14,999
6. $15,000 - $17,999
7. $18,000 - $20,999
8. $21,000 - $23,999
9. $24,000 - $26,999
10. $27,000 and over

Role count: the number of roles an individual maintained. Possible roles included were: 1) household member (if the respondent lived with someone), 2) kinsman, 3) friend, 4) neighbor, 5) worker, 6) church-goer, 7) organization member, and 8) specific person. The role count was established in each of the three periods covered by this study: pre-retirement, post-retirement, and current.

Scoring for the role count was as follows:

1) Relatives: one point was given for each category of relative.

2) Friend: one point was given if any friends were mentioned.

3) Household member: one point was given if the respondent lived with one other person; two points were given if the respondent lived with two or more people.

4) Neighbor: one point was given if any neighbors were mentioned.

5) Specific people: one point was given if any were mentioned.

6) Fellow worker: one point was given if the respondent was employed.

7) Church-goer: one point was given if the respondent attended church once a month or more frequently.

8) Organization-member: one point was given for membership in each organization.

Possible relative roles for the respondent included: spouse, father, brother, brother-in-law, father-in-law, son-in-law, son, cousin, nephew, uncle, grandfather, and great-grandfather.

Social life space: a measure of interaction developed by Cumming and Henry which provides a monthly interaction index. A heavier weight was assigned to family, friends, and neighbors because it was thought they exert more influence than either fellow worker or specific people.

The specific weights were:

1) Household member: each person in the household other than the respondent was multiplied by 30.

2) Relatives, friends, and neighbors were scored as follows:

If seen every day	30 points
If seen once a week	4 points
If seen a few times a month	3 points
If seen once a month	1 point
If seen anything less	0 points

3) Fellow workers: the number of fellow workers was multiplied by 20.

4) Specific people: the number of specific people was multiplied by 4.

5) Church and organization memberships were excluded from the social life space measure because interaction cannot automatically be assumed for these roles.

Elderly: anyone sixty years of age or older. All but two of the respondents were at least sixty when they retired.

Instrument

The interview schedule used in this study had five distinct parts: introductory questions, pre-retirement interaction, post-retirement interaction, current interaction, and present wishes and inclinations. (Refer to the Appendix for a copy of the interview schedule.)

The first section of the interview schedule covered basic details of the respondent's life. General information included: the respondent's age, annual family pre-retirement income, annual family current income, acreage owned (asked of rural respondents only), pre-retirement health, post-retirement health, length of time in the current community, length of time in the former community (if the respondent had moved since retirement), and religion.

Information about the respondent's family life included: current marital status, years of current marital status, the age, sex, and location of all children, grandchildren, great-grandchildren, and siblings. In addition, the respondent was asked if any children or siblings had died during the period covered by the study.

The respondent was asked how many years of education he had received, the type of education, and if any degrees were received.

Under the broad category of career, the respondent was asked what occupation he had pursued for most of his lifetime prior to retirement. Questions were asked about the work situation: whether the respondent was self-employed or employed by others, and whether he worked alone or worked with others for most of his career. Open-ended questions concerned the respondent's view on work in general and how important he believed work to be.

Retirement topics began with the year of retirement and the respondent's age at retirement. Reasons for retirement and willingness to retire were queried. The respondent was asked if he was currently employed, what he did if he was, whether he was self-employed, why he was working, whether he had sought employment since retirement, and why he did or did not seek re-employment.

Three parts of the interview schedule (pre-retirement, post-retirement, and current) were identical. The difference was only in its relation to the time of retirement. The pre-retirement period was the year prior to retirement. The post-retirement period was the year after retirement. The current period was the respondent's life in the year he was interviewed.

There was a misunderstanding between some potential respondents and the interviewer when the interview was set up. This misunderstanding led to a few respondents who had not yet retired. Because many of these were rural respondents, entailing a good deal of traveling, they were interviewed as a comparison group. In these instances, the two stages of pre-retirement and post-retirement were adapted to the situation. The pre-retirement period became the respondent's life ten years prior to the interview. The post-retirement period was the period five years prior to the interview. The current period remained the same as with the main sample, which was the respondent's life in the year he was interviewed.

The topics covered in the three temporal periods of the interview schedule concerned who the respondent lived with, what relatives he felt close to, approximate number of friends, neighbors, specific people, and fellow workers. The amount of interaction for each of these categories of people was calculated. In addition, there were queries about membership attendance, and positions held in church and secular organizations.

The last section of the interview schedule covered wishes and inclinations. The respondent was asked if there was anyone he wished to see more of and if so, who. He was asked why he didn't seek out more of these people. Interests or activities that the respondent wished to

engage in and the reasons for his non-involvement were asked. Finally, the respondent was asked if there were any groups or organizations he wished to belong to and why he was not involved in these groups and organizations.

The interview schedule was tested on a few retired volunteers from a church in Greensboro. With this testing it became apparent that, while it was possible to complete the schedule in thirty to forty-five minutes, it could take considerably longer due to the interest and loquaciousness of the interviewees.

Chapter IV

Findings

T-tests were run for the three periods of the role count, and of the social life space. These t-tests revealed no significant differences in the social life space scores of the pre-retirement, post-retirement, and current periods; therefore, the social life space measure was dropped as a general measure of re-engagement. T-tests of the role count were significant; hence, the role count was the general measure of re-engagement.

August B. Hollingshead (1957) devised a measure of social position by computation of education and occupation scores. Hollingshead's Index was utilized in this study. The sample was divided into fifteen divisions by this Index. Because there were only sixty-eight respondents, three general classes were established: upper class (scores 11 through 25), middle-middle class (scores 31 through 41), and lower-middle class (scores 45 through 59). There were no respondents who fell in the intervals. There were fourteen respondents in the upper class, twenty-four respondents in the middle-middle class, and thirty respondents in the lower-middle class.

After sampling, it was found that using Hollingshead's classification, there were no lower class respondents. Another deviation was the presence of a few extremely wealthy respondents. In view of the smallness of the sample and to simplify the hypothesis testing, the final class stratification was composed of the upper-middle class (including the

extremely wealthy and the normally upper-middle class), the middle-middle class, and the lower-middle class. (See Appendix for demographic characteristics of the total sample.)

Hypotheses

Because of the smallness of the sample, the urban and rural classes were combined except in the first hypothesis where location was the independent variable. For example, all hypotheses predicting urban lower-middle class participation include both the urban and rural lower-middle class.

Other variables tested in the hypotheses were re-employment, reasons for re-employment, and membership in voluntary associations. Because few respondents became re-employed, percentages are reported as the clearest indication of class trends.

In testing for membership in voluntary associations, the percentage of membership indicated the number of respondents holding at least one membership. Respondents may have belonged to several voluntary associations but the analysis was only concerned with the presence of any memberships, and not with the quantity.

T-tests run on the hypotheses showed no statistically significant findings to validate the general re-engagement hypotheses (Hypotheses 1, 2, and 4). Some pairs within some of these hypotheses were statistically significant but these individual pairs do not validate the hypothesis in its entirety. The accompanying tables include these significant levels of variance for the individual pairs.

Hypothesis 1: Re-engagement is more likely to occur in the urban sample than in the rural sample.

No t-tests run on this hypothesis were statistically significant; however, some F-tests were statistically significant. (The findings are reported in Table 1.)

While the means of the rural role count declined over the three periods, the urban sample means were erratic. The highest mean for the urban sample was during the post-retirement period. The pre-retirement period had the next highest mean for the urban respondents. The current mean was lowest within the urban sample.

The largest standard deviation difference in both the rural and urban samples was between the post-retirement and current periods. This indicates that there was great diversity among the respondents in the number of roles, i.e., while some respondents had few roles, others had many.

In comparing the urban and rural samples, during both the post-retirement and current periods, the urban role count means were higher. The rural mean was highest in the pre-retirement period.

Hypothesis 2: Re-engagement will occur least frequently in the lower-middle class.

It was thought that lower-middle class re-engagement would be unlikely because of little participation in voluntary associations. While some lower-middle class respondents might be re-employed, others might not because of the potential loss of social security benefits.

T-tests run on class differences of role count were not statistically significant; although some pairs did have significant variance. (The findings are reported in Table 2.)

TABLE 1

Temporal Changes in Role Count and Location

	Rural (N=36)		Urban (N=22)	
	Mean	Standard Deviation	Mean	Standard Deviation
Pre-Retirement Role Count	223.3	294.2	197.6	272.9*
Post-Retirement Role Count	161.2	235.1	234.5	296.3**
Current Role Count	94.1	144.8	150.8	243.0***

*Indicates significant variance at $p \geq .10$.

**Indicates significant variance at $p \geq .01$.

***Indicates significant variance at $p \geq .05$.

TABLE 2

Temporal Changes in Role Count and Class

	Upper-middle class		Middle-middle class		Lower-middle class	
	Mean	Standard Deviation	Mean	Standard Deviation	Mean	Standard Deviation
Pre-Retirement Role Count	245.1	337.4	250.0	328.7	193.0	237.7
Post-Retirement Role Count	291.7	364.5	161.5	227.7	202.5	276.4
Current Role Count	152.7	282.0	84.4	90.4	118.0	179.8

Column Comparison by Means (t-tests) and Variances (F-tests):

For Pre-Retirement Role Count, middle-middle class and lower-middle class, means, $p \geq .10$

For Post-Retirement Role Count, upper-middle class and middle-middle class, means, $p \geq .05$.

For Current Role Count, middle-middle class and lower-middle class, means, $p \geq .001$.

For Current Role Count, upper-middle class and lower-middle class, means, $p \geq .05$.

For Current Role Count, upper-middle class and middle-middle class, means, $p \geq .00$.

No significant F=tests were reported.

The lower-middle class role count means for both the post-retirement and current periods were larger than the corresponding means for the middle-middle class. In both the post-retirement and current periods, the upper-middle class had higher means than the lower-middle class.

Standard deviation scores revealed that in all three classes, there were wide variations among respondents in the role count scores between the post-retirement and current periods. Within classes, the standard deviation scores were larger in the post-retirement period than in the pre-retirement period for both the upper-middle and lower-middle classes. In the middle-middle class, there was a sharp decline over time.

The lowest standard deviation scores of the current period indicated a conformity within each class such that more respondents were at either extreme of high or low role count means. Conversely, the large standard deviation scores in the post-retirement period of the upper-middle and lower-middle classes indicated a divergence in the role count means.

In the worker role, there were eleven (37 percent) lower-middle class respondents who were re-employed. This is a smaller percentage of re-employed than either the upper-middle class (43 percent) or the middle-middle class (46 percent). (Findings are reported in Table 3.)

The lower-middle class had the highest percentage of respondents who belonged to at least one voluntary association in the post-retirement period, followed by the upper-middle class and the middle-middle classs. In the current period, the lower-middle class had fewer

TABLE 3

Class and Reasons for Re-employment (Percentage)

	Upper-middle class (N=6)	Middle-middle class (N=11)	Lower-middle class (N=11)
money	0	36	36
maintain farm/business	0	9	9
keep busy	0	36	18
enjoys people (sociability)	17	9	18
enjoys work	83	9	18
Total	100	99	99

respondents holding memberships than the upper-middle class but the lower-middle class had more respondents who held at least one membership than the middle-middle class. (Refer to Table 4 for findings.)

Retired lower-middle class farmers may continue their memberships in the Farm Bureau after retirement. This could explain some of the post-retirement membership in the lower-middle class and be reflected in the means of the role count. The lower showing of the middle-middle class during both the post-retirement and current periods may be due to the inability to pay membership dues. It might also indicate that their losses in voluntary associations may be work-related (unions or professional organizations, for example).

Hypothesis 3: The re-engagement which does occur in the lower-middle class is most likely to be re-employment for financial remuneration.

It was stated in Hypothesis 2 that some lower-middle class retirees may forego re-employment so as not to lose their social security benefits. However, some lower-middle class respondents might become re-employed part time or they might find a job which pays more than social security, although this is questionable.

This hypothesis was supported within the lower-middle class (see Table 3). Over a third (36 percent) of the re-employed lower-middle class was re-employed for financial remuneration. The other possible reasons for re-employment had lower percentages among lower-middle class respondents.

Among all classes, half of those re-employed for financial remuneration were in the lower-middle class. The remaining half were in the middle-middle class.

TABLE 4

Class and Percentage of Respondents Reporting at Least One Voluntary Association Membership

	Upper-middle	Middle-middle	Lower-middle
Post-Retirement membership	86 (N=12)	75 (N=18)	87 (N=26)
Current membership	86 (N=12)	62 (N=15)	73 (N=22)

Hypothesis 4: Re-engagement is most likely to occur in the upper-middle class.

Upper-middle class retirees who have been deeply involved in their work may find retirement unappealing. Upper-middle class re-engagement would be encouraged by varied skills once needed in the former occupation. In addition, this class has the greatest financial resources and is most attractive to community organizations.

While there were no statistically significant differences on re-engagement, some of the pairs revealed statistically significant findings. The upper-middle class had the highest role count means of three classes in both the post-retirement and current periods. (Refer to Table 2.)

With regard to membership in voluntary associations in the post-retirement period, the upper-middle class was second in frequency of respondents with at least one voluntary association membership. However, the difference between the lower-middle class with the greatest frequency and the upper-middle class frequency was only 1 percent (see Table 4).

In the current period, the upper-middle class had the greatest frequency of respondents with at least one membership. The percentage of upper-middle class respondents involved in voluntary associations remained the same between the post-retirement and current periods. The other two classes showed a decline in the frequency of respondents with memberships from the post-retirement to the current period (refer to Table 4).

With regard to re-employment, the upper-middle class was intermediate in percentage of re-employed respondents (43 percent).

Hypothesis 5: Re-employment for sociability will occur most frequently in the lower-middle class.

Because little voluntary association participation was expected in the lower-middle class, a need for social interactions by retirees in this class may lead to re-employment.

This hypothesis was supported. Half of all respondents re-employed for sociability were in the lower-middle class. The remaining half were evenly distributed in the other two classes (see Table 3).

Hypothesis 6: Re-engagement through voluntary associations will be most likely to occur within the middle-middle class.

More re-engagement in the middle-middle class might be expected because re-engagement through re-employment would jeopardize social security benefits. Furthermore, it was expected that senior citizen groups and retirement groups would be most attractive to middle-middle class retirees.

This hypothesis was not supported. The middle-middle class had the lowest frequency of three classes of voluntary association memberships in both the post-retirement and current periods (refer to Table 4).

The middle-middle class might be unable to afford membership in some voluntary associations. In addition, middle-middle class retirees might spend their leisure time on hobbies, e.g., gardening and collecting. However, no hobby role was included in this study except when the respondent was a member of a hobby group (voluntary association).

Hypothesis 7: Re-engagement through voluntary association is most likely to occur in the upper-middle class.

Because of adequate income and increased leisure, lifelong or new interests and associations are potentially open to upper-middle class

retirees. Their skills and high status make these retirees desirable to voluntary associations.

In the post-retirement period, the upper-middle class was intermediate in frequency of voluntary association memberships. This class was only one percentage point below the lower-middle class which had the greatest frequency. In the current period, the upper-middle class did have the greatest frequency of voluntary association memberships (see Table 4).

Hypothesis 8: Re-engagement through senior citizen groups is most likely to occur within the middle-middle class.

There were too few memberships in retirement groups to be analyzed. In the pre-retirement period, two memberships were held in retirement groups. Five retirement group memberships were held in the post-retirement period. In the current period, there were seven retirement group memberships.

Post-Retirement Role Count Deviation

In the upper-middle class, the lower-middle class, and the urban subsamples, the post-retirement role count means exceeded both the pre-retirement and current role count means. This was unexpected and contrary to the premise that the greatest engagement occurs prior to retirement. To analyze the source of this deviation, all roles composing the role count were reviewed. The results of this review are presented below.

Relatives

For each period, respondents were asked: "What relatives (related through either blood or marriage) did you feel closest to?"

Each category of relative had a weight of one point. Eighteen categories were commonly mentioned in all three periods by at least one respondent: spouse, son, daughter, brother, sister, sister-in-law, brother-in-law, mother-in-law, mother, daughter-in-law, cousin, children, immediate family, nephew, grandchildren, granddaughter, in-laws, and siblings.

In the pre-retirement period, twenty-two categories were mentioned. In addition to the eighteen common categories, there were four others: son-in-law, uncle, aunt, and father. One respondent said he had no close relatives in the pre-retirement period.

In the post-retirement period, twenty-one categories were mentioned. In addition to the eighteen common categories, there were three others: son-in-law, father, and niece. All respondents reported closs relatives in the post-retirement period.

In the current period, twenty-one categories were mentioned. In addition to the eighteen common categories, there were three others: great-grandchild, niece, and married child and his/her family. Four respondents reported no close relatives in the current period.

While there was a decline of one role between the pre-retirement and two later periods, all respondents had close relatives in the post-retirement period. In comparison, one respondent in the pre-retirement period, and four respondents in the current period said they had no close relatives. This difference in the number of respondents with no close relatives explains some of the deviation.

Friends

For each period, respondents were asked: "How many people who you know do you consider close friends--that is, people you could confide in and talk over personal matters with?"

One point was given to respondents if they mentioned any friends. Two respondents said they had no close friends in the pre-retirement and post-retirement periods. Six respondents reported no friends in the current period. The role of friend does not explain the post-retirement deviation.

Household Member

For each period, respondents were asked: "How many people lived in this house with you?"

Respondents received one point if they lived with another person. Two points were given for living with two or more people.

In the pre-retirement period, thirty-four respondents had one household member and thirty-one had two or more household members. Three respondents lived alone.

In the post-retirement period, thirty-eight respondents lived with one person, while twenty-eight lived with two or more people. Two respondents lived alone.

In the current period, forty-two lived with one person, and seventeen lived with two or more people. Nine lived alone.

Chronologically, there was a decline in the number of respondents living with two or more people. Simultaneously, there was an increase of respondents who lived with one other person. In the current period, there was a considerable increase in the number of respondents living

alone. Total household role counts were: ninety-six in the pre-retirement period, ninety-four in the post-retirement period, and seventy-six in the current period. The role of household member does not explain the post-retirement deviation.

Neighbors

For each period, respondents were asked: "How many neighbors did you know best?"

Respondents were given one point if any neighbors were mentioned.

In the pre-retirement period, three respondents had no close neighbors. One respondent had no neighbors in the post-retirement period. In the current period, four respondents had no neighbors.

Some of the post-retirement deviation is explained by the role of neighbor.

Specific People

For each period, respondents were asked: "Now about people you saw for specific purposes--like storekeepers, bus drivers, waiters, salespeople, and so on. About how many of these did you see fairly regularly?"

If any specific people were mentioned, one point was given.

In the pre-retirement period, one respondent saw no specific people. In the post-retirement period, all respondents saw some specific people. Three respondents saw no specific people in the current period.

The role of specific people explained some of the deviation in the post-retirement period.

Fellow Workers

One point was given if the respondent was employed.

In the pre-retirement period, all respondents were employed.

In the current period, twenty-eight respondents were employed by others. Another eleven were self-employed. A total of thirty-nine respondents were employed in the current period.

No figure was available for post-retirement employment. The deviation is the increased post-retirement role count mean over the pre-retirement role count mean. But if all respondents were employed in the pre-retirement period (as they were) then the role of worker cannot explain the deviation in the post-retirement period.

Church-goer

For each period, respondents were asked: "How often do you attend church?"

Respondents got one point if they attended church at least once a month.

There was a decline in the number of respondents attending church. Simultaneously, the number of respondents who never attended church increased. Sixty-three respondents attended church at least once a month in the pre-retirement period. At the same time, one respondent never attended church. In the post-retirement period, fifty-nine respondents went to church at least once a month. Five respondents never attended church during the post-retirement period. In the current period, fifty-two respondents attended church at least once a month. Nine respondents never attended church in the current period.

The role of church-goer does not explain the post-retirement deviation.

Organization Member

For each period, respondents were asked: "Now I'd like you to think it over very carefully and tell me if you belonged to any groups, clubs, or anything like that?"

One point was given for each organization mentioned.

There was a steady decline in the number of respondents belonging to organizations as well as a decline in the number of organizations mentioned.

In the pre-retirement period, ten respondents did not belong to any organization. The number of respondents and the number of organizations they belonged to in this period were: fifty-eight respondents belonged to one organization, thirty-six respondents belonged to three organizations, eleven respondents belonged to four organizations, eight respondents belonged to five organizations, six respondents belonged to six organizations, four respondents belonged to seven organizations, and two respondents belonged to at least eight organizations.

In the post-retirement period, twelve respondents did not belong to any organization. The number of respondents and the number of organizations they belonged to in this period were: fifty-six respondents belonged to one organization, thirty-two respondents belonged to two organizations, nineteen respondents belonged to three organizations, eleven respondents belonged to four organizations, eight respondents belonged to five organizations, four respondents belonged to six organizations, two respondents belonged to seven organizations, and one respondent belonged to at least eight organizations.

In the current period, nineteen respondents did not belong to any organization. The number of respondents and the number of organizations they belonged to in this period were: forty-nine respondents belonged to one organization, thirty respondents belonged to two organizations, seventeen respondents belonged to three organizations, eleven respondents belonged to four organizations, seven respondents belonged to five organizations, four respondents belonged to six organizations, two respondents belonged to seven organizations, and two respondents belonged to at least eight organizations.

The role of organization member does not explain the post-retirement deviation.

Conclusion

Those roles or role sets which contributed to the higher post-retirement role count were informal: relatives, neighbors, and specific people. Roles in formal organizations--whether work, church, or voluntary--did not contribute to the high post-retirement role count mean. The retired men in this study who increased interaction did so through individuals or informal attachments.

Voluntary Association Membership

The majority of respondents in all classes belonged to at least one voluntary association in both the post-retirement and current periods. In the post-retirement period, the lower-middle class had a very slight edge over the upper-middle class in frequency of membership in at least one voluntary association. The middle-middle class had the lowest frequency in the post-retirement period of memberships in at least one voluntary association.

In the current period, the upper-middle class had the greatest frequency of at least one voluntary association membership. In decreasing frequencies of one or more voluntary association memberships were the lower-middle class and the middle-middle class.

Membership in at Least Two Voluntary Associations

There was an unexpected finding with regard to class and voluntary association memberships (See Table 4). Four hypotheses (2, 4, 6, and 7) were proposed in the belief that there was a positive relation between class and voluntary association membership. This was not supported by the data when only one voluntary association membership was analyzed.

On reflection, it seemed that the nearly universal participation of rural respondents in the Farm Bureau might have raised the number of voluntary association memberships. Those who belonged to the Farm Bureau often mentioned the economic advantages of membership; Farm Bureau members get discounts on goods. Some members commented on the insurance offered by the Farm Bureau. For most of the respondents who were Farm Bureau members, the organizational interaction was limited to an annual barbeque.

The researcher felt this limited interaction was not comparable to other types of voluntary associations which had weekly or monthly meetings. Consequently, cross-tabulations were run on class by the presence of a second voluntary association membership. This would delete all rural respondents who belonged to only the Farm Bureau.

By concentrating on two or more voluntary association memberships, middle-middle class and lower-middle class membership frequencies declined sharply. Upper-middle class memberships maintained the frequencies in both periods regardless of whether one or more memberships were analyzed.

In the post-retirement period, there was a positive relation between class and frequency of membership in at least two voluntary associations. Greater loss was sustained by the lower-middle class in comparison with at least one membership. The middle-middle class also lost memberships. Upper-middle class frequencies stayed at the same level. (Refer to Table 5.)

In the current period, the upper-middle class maintained their high frequency. The middle-middle class and lower-middle class had practically identical frequencies of two or more voluntary association memberships.

In view of these additional findings, there was a positive relation between class and the presence of at least two voluntary association memberships in the post-retirement period. In the current period, the upper-middle class retained their dominance while the other two classes had lower and nearly identical frequencies of at least two memberships.

Conclusion

If two or more voluntary association memberships are introduced to the analysis of Hypotheses 2, 4, 6, and 7, some changes occur. Although the general measure of re-engagement remained unchanged in Hypotheses 2 and 4, the presence of at least two voluntary association memberships clarified the situation. Hypotheses 6 and 7 dealt directly with voluntary association memberships.

In Hypothesis 2, the re-engagement was expected to occur least frequently in the lower-middle class. The re-engagement measure of role count mean was statistically insignificant. Membership in at least two

TABLE 5

Class and Percentage of Respondents Reporting at Least Two Voluntary Association Memberships

	Upper-middle	Middle-middle	Lower-middle
Post-Retirement memberships	86 (N=12)	58 (N=14)	50 (N=15)
Current memberships	86 (N=12)	46 (N=11)	47 (N=14)

voluntary associations revealed the fewest such members in the lower-middle class during the post-retirement period. The current period had virtually the same frequency of at least two memberships by the middle-middle and lower-middle classes. (Both classes had fewer second memberships than the upper-middle class.)

In Hypothesis 4, re-engagement was expected most frequently in the upper-middle class. The re-engagement measure of role count mean was statistically insignificant. This hypothesis is substantiated by the greater number of second memberships held by the upper-middle class in both the post-retirement and current periods.

In Hypothesis 6, re-engagement through voluntary associations was expected to occur most often in the middle-middle class. This hypothesis was not supported by memberships in at least one voluntary association. The analysis of second voluntary association memberships also does not support this hypothesis.

In Hypothesis 7, re-engagement through voluntary associations was expected to occur most frequently in the upper-middle class. Differences between the lower-middle class and the upper-middle class were too slight to support this hypothesis. Analysis of second voluntary association memberships supported this hypothesis. The original testing of this hypothesis by at least one voluntary association membership was unclear. The analysis of the second voluntary association membership clarifies the situation of the upper-middle class.

Chapter V

Summary and Discussion

This chapter has three sections: limitations of the study, summary of findings, and discussion. The limitations of the study will cover problems which may have hampered the research. The summary will review the results of the hypothesis testing. The discussion will list future research needs and relate the present study to the disengagement theory.

Limitations of the Study

The major difficulties encountered in this study involved sampling, measurement of interaction, definition of retirement, and assigning class position.

Sampling

The smallness and the homogeneity of the sample limit the results. At planning, it was intended that a total of seventy respondents would be interviewed: thirty-five from an urban area, and thirty-five from a rural area. In actuality, only sixty-eight interviews were collected. Of these sixty-eight interviews, forty-two were from rural respondents and twenty-six were from urban respondents. Among the sixty-eight respondents were ten who had not retired early enough to give information on all three periods.

Potential urban respondents were less agreeable to be interviewed. The rural respondents were more cooperative. The researcher credits the support of the Agricultural Stabilization and Conservation Service, a familiar agency to the rural respondents, for the interest and help of

the rural respondents. In contrast, there was no sponsoring agency in the urban area. Although the letters which requested interviews were typed on University of North Carolina at Greensboro Department of Sociology stationery, this connection did not seem to influence respondents or potential respondents.

Because there were considerably fewer urban respondents then intended, the total sample was less diversified than it might have been. Differences between rural and urban respondents were not as great as expected. With a larger sample, some differences might have appeared or been clearer than actually resulted.

Quantity of Interaction Versus Quality of Interaction

The interview schedule concentrated heavily on the amount of interaction. From this information little can be inferred about the quality or desirability of being with particular people. Only for the relative role set was there any question about favorite interactors. Other roles which might have delved into the quality of interaction were friends, neighbors, specific people, and co-workers.

Recall

Since approximately three-fifths of the interview schedule dealt with past events, the recall of respondents influenced the results. While no senile or confused respondents were interviewed, incorrect answers may have been given unknowingly. In particular, estimates of the number and interaction with friends, neighbors, or specific people seen in the pre-retirement or post-retirement periods may have been shaky.

Ambiguity of Retirement for the Self-Employed

Respondents were asked when they retired. For the self-employed, specially the farmers, it was sometimes difficult to set a date for retirement. Many farmers maintained their land and put in crops even after they said they had retired. This ambiguity surfaced early in the interviewing. In an attempt at clarification, the interviewer would ask whether the farmer-respondent received social security. As a social security recipient, the respondent could only earn a small amount of income before being penalized by decreased social security benefits.

Socioeconomic Status and Property

To assign class position, Hollingshead's Index was used. In this Index, education and occupation are utilized for the final class position. For the farmers, the amount of acreage was recorded; however, this acreage was not included in the final class position. It is conceivable that a farmer with little education and a small income may have access to larger resources because of his acreage.

Voluntary Association Discrepancies

All voluntary association memberships were initially treated equally. Interaction analysis was based only on the presence or absence of membership. Amount of interaction or depth of interaction (leadership roles, for example) were ignored. This ignorance came to the forefront with the dilemma of Farm Bureau memberships. Members of the Farm Bureau who only attended one meeting a year were compared with members of other types of voluntary associations who attended meetings monthly or weekly. This problem was partly remedied later with the analysis of at least two voluntary association memberships.

Church Participation

Church participation was analyzed on the basis of frequency of church attendance. Again, as with voluntary associations, depth of interaction data was collected but not analyzed. Participation in church-related activities--Sunday school, choir, or board memberships--was also neglected.

Summary

The findings of this study are:

1) There were no statistically significant class (lower-middle, middle-middle, and upper-middle) differences on the general measure of re-engagement (role count means).

2) There were no statistically significant location (rural-urban) differences on the general measure of re-engagement.

3) Increased interaction in the post-retirement period was due to the urban, upper-middle, and lower-middle classes socializing more with relatives, neighbors, and specific people.

4) Those respondents who were re-employed composed forty percent of the upper-middle and middle-middle classes, and thirty-three percent of the lower-middle class.

5) Reasons for re-employment differed by class. Those in the upper-middle class who were re-employed did so overwhelmingly because they enjoyed work. In the middle-middle class, there were two main reasons for re-employment: money and to keep busy. In the lower-middle class, money was mentioned most frequently as the reason for re-employment. Other less significant reasons for re-employment given by the lower-middle class were: to keep busy, sociability, and enjoyment of work.

6) Analysis of class and membership in at least one voluntary association in the post-retirement and current periods were inconclusive.

7) Analysis of class and membership in at least two voluntary associations in the post-retirement and current periods, revealed the higher frequency of upper-middle class membership. On second memberships in the post-retirement and current periods, there was almost no difference between the middle-middle and lower-middle classes.

8) Membership in senior citizen and retirement groups was too infrequent to be analyzed.

Re-engagement--an increase in roles after retirement--was predicted to differ by location. Re-engagement was hypothesized to be most likely among urban, and upper-middle class subsamples. In addition, it was predicted that the lower-middle class would be the class least likely to re-engage. None of these predictions were supported by the general measure of re-engagement. There were no class or location differences in the pre-retirement role count means.

While the rural sample's role count means decreased over time, the urban role count means were inconsistent. There was an increase in the urban role count means from the pre-retirement to the post-retirement period; in the current period, the urban role count mean was lower than the pre-retirement role count mean for the urban sample. In both the urban and rural samples, large standard deviations were reported between the post-retirement and current periods. These standard deviations indicate that there was, within each sample, a diversity in the number of roles individual respondents engaged in. Many respondents appear to have been at either extreme of role activity. There were no statistically

significant differences between the rural and urban samples.

Again, no statistically significant findings were revealed with regard to class and re-engagement. In the pre-retirement period, the middle-middle class had the largest role count mean followed by the upper-middle class and the lower-middle class. In the post-retirement period, the upper-middle class had the highest role count means followed by the lower-middle class and the middle-middle class. This ordering remained constant in the current period: the upper-middle class had the highest role count mean followed by the lower-middle and middle-middle classes.

Within classes, only the middle-middle class showed decreasing role count means consistently. In both the upper-middle and lower-middle classes, the highest role count mean was in the post-retirement period followed by the pre-retirement period and the current period. There were no statistically significant findings.

Standard deviation scores declined over time in the middle-middle class. This indicates increasing homogeneity in the number of roles middle-middle class respondents engaged in. In both the upper-middle and lower-middle classes, the highest standard deviation scores were in the post-retirement period, followed by the pre-retirement and current standard deviations. Apparently, the greatest diversity in the number of roles upper-middle class and lower-middle class respondents engaged in occurred in the post-retirement period.

While the highest role count means were expected to occur in the pre-retirement period, this was not supported among the urban, upper-middle class, and lower-middle class subsamples. Further analysis

revealed increased interaction in the post-retirement period through the roles or role sets of relatives, neighbors, and specific people. Formal organizations did not contribute to the post-retirement increase of the role count means.

Re-employment differed only slightly by class. The middle-middle class (46 percent) had only a few more re-employed respondents than the upper-middle class (43 percent) and the lower-middle class (37 percent).

Reasons for re-employment did differ within classes. The majority (83 percent) of the upper-middle class respondents who became re-employed did so because they enjoyed work. Money (36 percent) and keeping busy (36 percent) were mentioned equally often by the middle-middle class respondents as reasons for re-employment. Lower-middle class reasons for re-employment were varied. The largest percentage of lower-middle class respondents reported money (36 percent), keeping busy (18 percent), sociability (18 percent), and enjoyment of work (18 percent) as their reasons for re-employment.

Between class analysis of reasons for re-employment revealed that the lower-middle and middle-middle classes were equally divided on becoming re-employed to maintain the farm or business, and for money. (No upper-middle class respondent mentioned money or the maintenance of a farm or business as reasons for re-employment.) Two-thirds of those re-employed to be busy were middle-middle class, the other one-third were lower-middle class. Half of those mentioning sociability as the prime reason for re-employment were lower-middle class, one-quarter were middle-middle class, and another quarter were upper-middle class. Almost two-thirds (63 percent) of those re-employed because they enjoyed work

were upper-middle class. One quarter who were re-employed because they enjoyed work were lower-middle class. The remaining (13 percent) re-employed for work enjoyment were middle-middle class.

Two hypotheses dealt with reasons for re-employment. Financial remuneration was predicted to be the most important reason for re-employment in the lower-middle class. This hypothesis was supported. Re-employment for sociability purposes was expected to occur most frequently in the lower-middle class. This hypothesis was supported.

Re-engagement through voluntary associations was predicted in two hypotheses. The first hypothesis expected re-engagement through voluntary associations to occur most frequently in the middle-middle class. The other hypothesis expected re-engagement through voluntary associations to occur most often in the upper-middle class.

When membership in at least one voluntary association was analyzed, the first hypothesis predicting greater middle-middle class involvement was not supported. The analysis of one voluntary association membership and the upper-middle class was unclear. When two or more voluntary memberships were analyzed, the upper-middle class did have the largest frequency of memberships in the post-retirement and current periods. The middle-middle class followed the upper-middle class in frequency of memberships in the post-retirement period. In the current period, the middle-middle class and lower-middle class had virtually identical frequencies.

The last hypothesis predicted re-engagement via senior citizen and retirement groups to occur most frequently in the middle-middle class. Too few respondents belonged to senior citizen or retirement groups to

analyze this hypothesis.

Discussion

Initially much gerontological research centered on the institutionalized aged. This concentration was based on two considerations: 1) the ease of studying the institutionalized (a "captive" sample), and 2) the early concern with the aged as a social problem. Contemporary gerontological research has widened its scope to include the healthy, independent aged as well as the institutionalized or deprived aged.

Further gerontological research is indicated, particularly on the rural elderly. The confusion of social and psychological variables has hampered research and theory on the aging. The focal point of much gerontological research has been the amount of interaction of the elderly; yet few researchers seem to be sensitive to the quality of interaction. This chapter will close with an examination of the relationship between the disengagement theory and this study.

Paucity of Research on the Rural Elderly

During the planning of this study, published analytic research on the rural elderly was scarce. Many descriptive studies have been compiled by agricultural experiment stations throughout the nation. These studies are extremely specific and caution warns against generalization. Since a large proportion of American elderly reside in rural areas, they should be comprehensively and analytically studied.

Social Versus Psychological Processes

Throughout the gerontological literature, there has been a confusion over social and psychological processes. With regard to this study, this confounding of social and psychological processes is revealed in the

dilemma of disengagement. Social processes, such as forced retirement and isolation from others, and psychological processes, such as voluntary withdrawal have too often been seen as identical and equivalent.

This confusion may be traced to the education of those who conduct gerontological research. Until recently, there were few courses dealing with the last third of the lifespan. Even today, these courses tend to be centered in one discipline (sociology, or psychology, or biology, etc.). The confusion over social, psychological, and physiological aspects of aging demands an interdisciplinary curriculum in the future.

Interaction Measures

Measures which only take into account the amount of interaction are inadequate. This inadequacy may be critically important when studying the elderly because so many of them do appear to have decreased interaction. In this instance, the quality of interaction becomes particularly critical.

The disengagement theory predicts a continuing decline in social interaction after retirement. This decline was not found throughout this study. Instead, there was an increase in role count means immediately after retirement for the urban, upper-middle class, and lower-middle class subsamples. This post-retirement period was followed by the lowest role count means in the current period. (The rural and middle-middle class subsamples had decreasing role count means from the pre-retirement period through the post-retirement period, with the lowest means reported in the current period.)

For the urban, upper-middle class and lower-middle class, the increased role count means were due to interaction with relatives,

neighbors, and specific people. Cumming and Henry state that disengaging people will turn to those close to them for interaction. The findings of this study support this position.

While there is no information available as to why the urban, upper-middle class, and lower-middle class subsamples increased their interaction, it is possible to speculate as follows.

The urban sample, just by living in a heavily populated area, has more potential interactors nearby. The roles of specific people include all types of service people (bus and taxi drivers, waitresses, and salespeople, etc.) who are more numerous in cities. The availability of services and of employment may lead family members to remain in the city where they were raised. If this is so, then the higher interaction in the urban area may be due to the close proximity of family members. Accessible public transportation in the city may also encourage interaction.

Increased post-retirement interaction by the upper-middle class can be easily explained. As the wealthiest stratum in this study, the upper-middle class have the greatest opportunities for maintaining and increasing interaction. Interaction with family members can be furthered by the ability to see (travel) and communicate (telephone) with them more often and over farther distances. The role of specific person is most available to the well-to-do who can afford to dine out, shop, and hire others for various services.

The increase of social interaction in the post-retirement period by the lower-middle class is less easily explained. If it can be assumed that family and neighbors are the bedrock of social life, than when other roles (worker, organization- and church-member) are dropped or

taken away through age, illness, or lowered income, these bedrock roles assume great importance. As long as personal relations are harmonious and interaction does not mean expenditure of much money, interaction with family and neighbors may continue or increase. Even specific people may be seen frequently. Lower income people may depend on public transportation (bus drivers, particularly). They may window-shop or stop by a favored lunch counter (waitress) for a cup of coffee. In rural areas, lower-middle class farmers may visit the country store, especially in winter, to pass the time playing cards and conversing with other farmers and the storekeeper.

The fact remains that the Cumming and Henry study was conducted in a city among healthy, solvent men and women. Why should the present study diverge from the original disengagement sample? One difference is the geographical location. The present study was conducted in the South, an area commonly assumed to stress close personal relations. If this is a factor, then increased involvement should also have occurred in the rural sample unless the isolation and probable lower income reduced the social outlets available.

The divergence of the Cumming and Henry study from this one illustrates the heterogeneity of the elderly. Geographical, economic, social, and personal characteristics are not easily generalized for any large aggregate. The elderly may be the aggregate least possible to generalize about because the individuals composing it have had sixty, seventy, eighty or more years to become what they are. The sums of the individual experiences cautions against lumping all elderly together in the search for a universal explanation of social aging.

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Appendix

TABLE 6

Distribution of Total Sample on Eight Demographic Characteristics

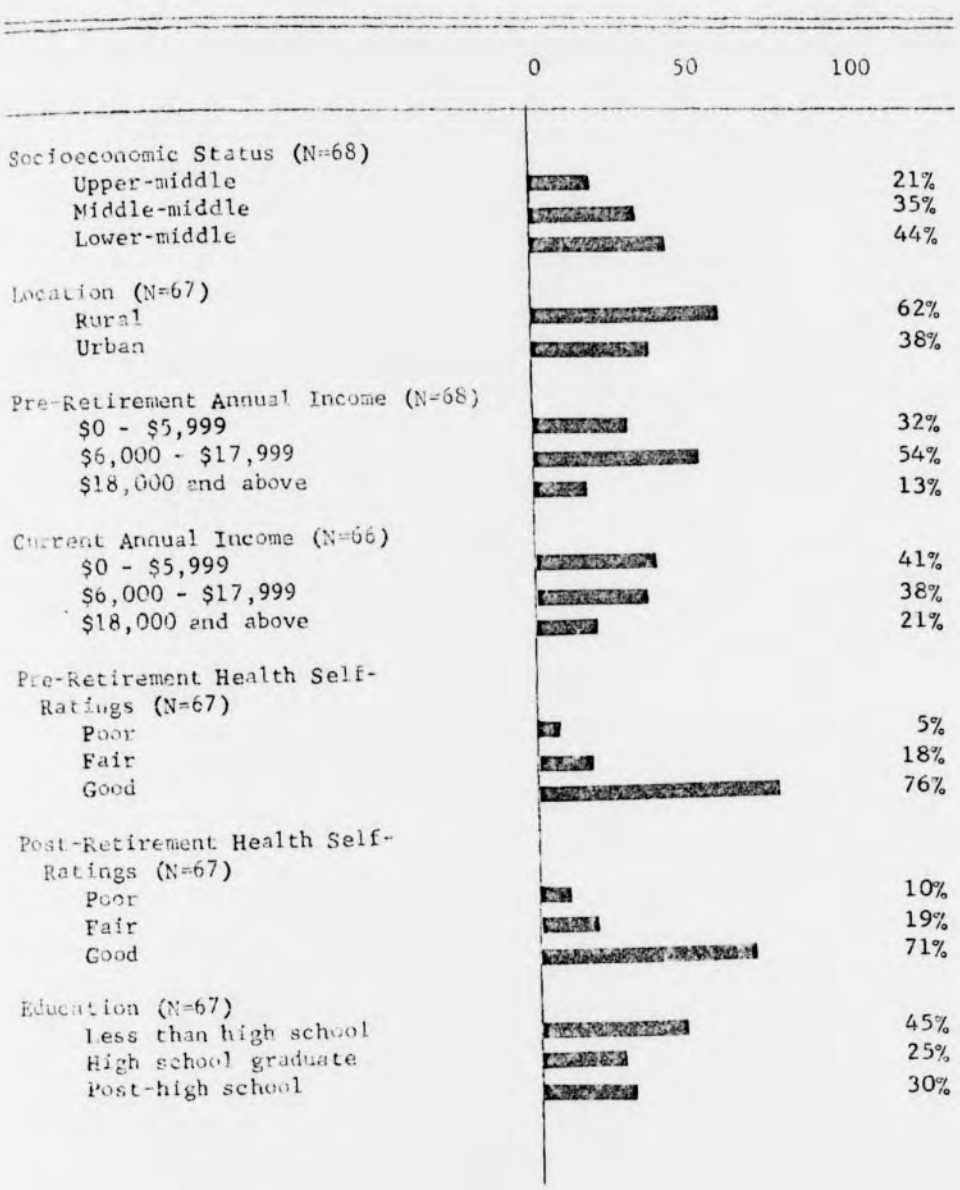
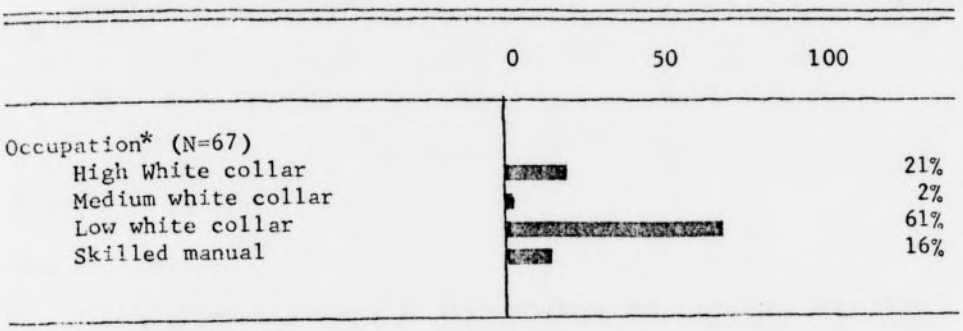


TABLE 6 - Continued



*Based on Hollingshead's Two Factor Index of Social Position.

THE UNIVERSITY OF NORTH CAROLINA
AT GREENSBORO

Department of Sociology

121

Dear Mr. Jones,

I am a graduate student in the sociology department at the University of North Carolina at Greensboro.

Within the general field of sociology my particular interest is aging and the elderly. One of the most important aspects of aging is retirement. My thesis concerns the patterns of retirement interests among urban and rural men in their sixties and seventies. I need to interview approximately seventy men.

Greensboro city blocks listed in the census tracts as consisting of over half elderly were noted. The streets in these blocks were then located in the city directory where names were selected randomly. Your name was chosen in this manner.

I would very much appreciate your permitting me to interview you. The interview takes only thirty to forty-five minutes. All information gotten in the interview is, of course, confidential. This information will be analyzed by a computer. Your name will not be noted in either the computer findings or in the thesis itself.

I will telephone you about one week after sending you this letter. I hope to set up an appointment for the interview at that time. In addition, I would be only too happy to answer any questions you may have.

Sincerely,

Heidi Setz

THE UNIVERSITY OF NORTH CAROLINA
AT GREENSBORO

Department of Sociology

122

Dear Mr. Jones,

I am a graduate student in the sociology department at the University of North Carolina at Greensboro.

Within the general field of sociology my particular interest is aging and the elderly. One of the most important aspects of aging is retirement. My thesis concerns the patterns of retirement interests among urban and rural men in their sixties and seventies. I need to interview approximately seventy men.

Your name was chosen at random from the listing at the Agricultural Stabilization and Conservation Service in Reidsville which has been extremely cooperative in helping me to locate men with an interest in farming.

I would very much appreciate your permitting me to interview you. The interview takes only thirty to forty-five minutes. All information gotten in the interview is, of course, confidential. This information will be analyzed by a computer. Your name will not be noted in either the computer findings or in the thesis itself.

I will telephone you about one week after sending you this letter. I hope to set up an appointment for the interview at that time. In addition, I would be only too happy to answer any questions you may have.

Sincerely,

Heidi Setz

My name is Heidi Setz. I am a graduate student in sociology at the University of North Carolina at Greensboro. I am interviewing men in their sixties to find out what activities and interests they have.

1. Identification
   1. Code Number____
   2. Circle one: 1) rural 2) urban

2. Age
   _____years

3. Marital Status
   1. single___
   2. divorced/separated___ 2. how long divorced/separated___
   3. married___ 3. how long married___
   4. widowed___ 4. how long widowed___

4. Children
   1. Do you have children? 1) yes___ 2)no___
   2. How many children do you have? _____
   3. Have any of your children died since the year before you retired?
      1) yes___ 2) no___
   4. If so, how many? _____

Name/I.D.	Sex	Approx. Age	Present Residence

5. Grandchildren
   1. Do you have any grandchildren? 1) yes___ 2) no___
   2. How many grandchildren do you have?_____

Name/I.D.	Sex	Approx. Age	Present Residence

6. Siblings
   1. Do you have any brothers? 1) yes___ 2) no___
   2. How many brothers do you have? _____
   3. Do you have any sisters? 1) yes___ 2) no___
   4. How many sisters do you have? _____
   5. Have any of your brothers or sisters died since the year before you retired? _____
      If so, how many? ____

Name/I.D.	Sex	Approx. Age	Present Residence

7. Education
   1. How many years of education have you had?_____(yrs.)
   2. any college_____(yrs.)
   3. any trade school_____(yrs.)
   4. any business school_____(yrs.)
   5. other_____(yrs., specify type of schooling)

8. Occupation
   1. What occupation did you engage in for the greatest part of your life prior to your (first) retirement?_____
   2. Did you work alone? 1) yes___ 2) no___
   3. Were you self-employed? 1) yes___ 2) no___

9. Retirement
   1. When did you retire from your major or lifelong occupation?
      _____(yr. of retirement)
   2. At what age did you retire from your major or lifelong occupation?
      _____(age)
   3. Why did you retire? (Get specific, ordered reasons)
      1._____
      2._____
      3._____
      4._____
   4. Did you want to retire? 1) yes___ 2) no___

5. (Regardless of previous answer) Why? (Get specific, ordered reasons.)
   1._____
   2._____
   3._____
   4._____

6. Are you currently employed? 1) yes___ 2) no___
7. What do you do?_____
8. Are you self-employed? 1) yes___ 2) no___
9. Why are you working? (Get specific, ordered reasons.)
   1._____
   2._____
   3._____
   4._____

10. Since retirement, have you sought employment? 1) yes___ 2) no___
11. Why? (Get specific, ordered reasons.)
    1._____
    2._____
    3._____

10. Work
    1. In general, how do you feel about work?_____

_____

_____

_____

    2. How important do you think working is?_____

_____

_____

_____

11. Income
   1. What was your annual family income prior to retirement?
      1. $0 - $2,999
      2. $3,000 - $5,999
      3. $6,000 - $8,999
      4. $9,000 - $11,999
      5. $12,000 - $14,999
      6. $15,000 - $17,999
      7. $18,000 - $20,999
      8. $21,000 - $23,999
      9. $24,000 - $26,999
      10. $27,000 and over

   2. What is your present annual family income?
      1. $0 - $2,999
      2. $3,000 - $5,999
      3. $6,000 - $8,999
      4. $9,000 - $11,999
      5. $12,000 - $14,999
      6. $15,000 - $17,999
      7. $18,000 - $20,999
      8. $21,000 - $23,999
      9. $24,000 - $26,999
      10. $27,000 and over

   How many acres of land do you own (rural respondents only)? _____

12. Health
   1. How would you rate your health prior to your retirement?
      1) poor___ 2) fair___ 3) good___
   2. How would you rate your health since retirement?
      1) poor___ 2) fair___ 3) good___

13. Residence
   1. Current place of residence _____(town, nearest town)
   2. How long have you lived here? _____(yrs.)
   3. (If R has moved since retirement) How long did you live in your former community? _____(yrs.)

14. Religion
   1. Which religion do you consider yourself to be? _____

Pre-Retirement: The year prior to retirement from the major or lifelong occupation.

I am going to ask you a series of questions about your activities and interests in the period just prior to your retirement from your major or lifelong occupation.

1. In the year just prior to your retirement, how many people lived in this house with you?_____

2. In the year just prior to your retirement, what relatives (related through either blood or marriage) did you feel closest to?

_____

3. In the year just prior to your retirement, how often did you get together with these relatives?
   1. every day
   2. at least once a week
   3. a few times a month
   4. about once a month
   5. a few times a year
   6. about once a year
   7. almost never - didn't see them for years

4. In the year just prior to your retirement, how many people who you knew did you consider close friends - that is,people you could confide in and talk over personal matters with? (Get R to give a specific number, if possible.) _____

5. In the year just prior to your retirement, how often did you get together with your closest friends?
   1. at least once a week
   2. a few times a month
   3. about once a month
   4. a few times a year
   5. almost never - didn't see them in years

6. Now about people you saw for specific purposes - like storekeepers, bus drivers, waiters, salespeople, and so on. About how many of these did you see fairly regularly in the year just prior to your retirement? (Try to pin R down to a number, even if only approximate.) _____

7. In the year just prior to your retirement, which neighbors did you know best? (number) _____

8. In the year just prior to your retirement, how often did you get together with these neighbors?
   1. every day
   2. at least once a week
   3. a few times a month
   4. about once a month
   5. anything less

9. In the year just prior to your retirement, about how many people did you see and talk to in the course of a day's work? _____

10. In the year just prior to your retirement, how often did you attend church?
    1. twice or oftener per week
    2. once a week
    3. once or twice a month
    4. 2 or 3 times a year
    5. on very special occasions
    6. never

11. In the year just prior to your retirement, did you belong to any church committees, teach Sunday school, or anything like that?
    1. yes_____
    2. (If yes) Get list of activities _____
    _____
    3. How many times a month would you participate in these activities?
    _____
    4. no_____

12. Now I'd like you to think it over very carefully and tell me if you belonged to any groups, clubs, or associations, or anything like that in the year just prior to your retirement. Did you belong to any such groups at that time?
    1. yes_____
    2. (If yes) What were the groups? _____
    _____
    3. How often did you attend each per month? _____
    _____
    4. What did you do at each of the groups? _____
    _____
    5. no_____

First Year of Retirement

Now I'm going to ask you a series of questions about your activities and interests in the year just after your retirement from your major or life-long occupation.

1. In the year just after your retirement, how many people lived in this house with you?_____

2. In the year just after your retirement, what relatives (related through either blood or marriage) did you feel closest to?
   _____

3. In the year just after your retirement, how often did you get together with these relatives?
   1. every day
   2. at least once a week
   3. a few times a month
   4. about once a month
   5. a few times a year
   6. about once a year
   7. almost never - didn't see them for years

4. In the year just after your retirement, how many people whom you knew did you consider close friends - that is, people you could confide in and talk over personal matters with? (Get R to give a specific number, if possible.) _____

5. In the year just after your retirement, how often did you get together with your closest friends?
   1. at least once a week
   2. a few times a month
   3. about once a month
   4. a few times a year
   5. almost never - didn't see them in years

6. Now about people you saw for certain specific purposes - like storekeepers, bus drivers, waiters, salespeople, and so on. How many of these did you see fairly regularly in the year just after your retirement? (Try to pin R down to a number, even if only approximate.)
   _____

7. In the year just after your retirement, which neighbors did you know best? (number)_____

8. In the year just after your retirement, how often did you get together with these neighbors?
   1. every day
   2. at least once a week
   3. a few times a month
   4. about once a month
   5. anything less

9. (This next question is only applicable to those who got another job after the initial retirement.)
   In the year just after your retirement, about how many people did you see and talk to in the course of a day's work?_____

10. In the year just after your retirement, how often did you attend church?
    1. twice or oftener per week
    2. once a week
    3. once or twice a month
    4. 2 or 3 times a year
    5. on very special occasions
    6. never

11. In the year just after your retirement, did you belong to any church committees, teach Sunday school, or anything like that?
    1. yes_____
    2. (If yes) Get list of activities_____
    _____
    3. How many times a month would you participate in these activities?
    _____
    4. no_____

12. Now I'd like you to think it over very carefully and tell me if you belonged to any groups, clubs, or associations, or anything like that in the year just after your retirement. Did you belong to any such groups at that time?
    1. yes_____
    2. (If yes) What were the groups? _____
    _____
    3. How often did you attend each per month? _____
    _____
    4. What did you do at each of the groups? _____
    _____
    5. no_____

Post-Retirement

Now I am going to ask you a series of questions about your activities and interests in the second year of your retirement from your major or lifelong occupation.

1. In the second year of your retirement, how many people have been living in this house with you? _____

2. In the second year of your retirement, what relatives (related through either blood or marriage) do you feel closest to?
_____

3. In the second year of your retirement, how often have you gotten together with these relatives?
    1. every day
    2. at least once a week
    3. a few times a month
    4. about once a month
    5. a few times a year
    6. about once a year
    7. almost never - haven't seen them for years

4. In the second year of your retirement, how many people whom you know do you consider close friends - that is, people you can confide in and talk over personal matters with? (Try to get R to give a specific number, if possible.) _____

5. In the second year of your retirement, how often do you get together with your closest friends?
    1. at least once a week
    2. a few times a month
    3. about once a month
    4. a few times a year
    5. almost never - haven't seen them for years

6. Now about people you see for certain specific purposes - like storekeepers, bus drivers, waiters, salespeople, and so on. About how many of these do you see fairly regularly in the second year of your retirement? (Try to pin R down to a number, even if only approximate.) _____

7. In the second year of your retirement, which neighbors do you know best? (number) _____

8. In the second year of your retirement, how often do you get together with these neighbors?
   1. every day
   2. at least once a week
   3. a few times a month
   4. about once a month
   5. anytime less

9. (This next question is only applicable to those who got another job after their initial retirement.)
   In the second year of your retirement, about how many people do you see and talk to in the course of a day's work? _____

10. In the second year of your retirement, how often do you attend church?
    1. twice or oftener per week
    2. once a week
    3. once or twice a month
    4. 2 or 3 times a year
    5. on very special occasions
    6. never

11. In the second year of your retirement, have you belonged to any committees, teach Sunday school, or anything like that?
    1. yes_____
    2. (If yes) Get a list of activities _____
    _____
    3. How many times a month do you participate in these activities?
    _____
    4. no_____

12. Now I'd like you to think it over very carefully and tell me if you belong to any groups, clubs, or associations, or anything like that in the second year of your retirement. Do you belong to any such groups at this time?
    1. yes_____
    2. (If yes) Get list of activities_____
    _____
    3. How often do you attend each group per month?_____
    _____
    4. What do you do at each of these groups?_____
    _____
    5. no_____

* * * *

1. I want to ask you about your preferences of people you would like to see more of. Is there anyone who you would like to be with more often or for longer periods of time?
   1. yes_____
   2. Who are these people? (In order of preference)
      1._____
      2._____
      3._____
      4._____
   3. Why don't you see more of these people?_____
_____
   4. no_____

2. Is there any interest or activity which you have enjoyed engaging in that you don't participate in now but wished you did?
   1. yes_____
   2. What interests would you like to participate in?_____
_____
   3. Why haven't you continued or taken up these interests? _____
_____
   4. no_____

3. Are there any groups or organizations you wish you belonged to or were involved in?
   1. yes_____
   2. What groups or organizations would you like to be involved with?
_____
   3. Why aren't you involved in these groups?_____
_____
   4. no_____