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ABSTRACT

On the premise that researchers, practitioners, and policy makers lack an extensive and systematic examination of the concerns of the aging, this monograph examines American social issues as a context for a functional definition of aging and a taxonomy for use in conducting research. Issues are examined with regard to aging and work in four areas of American society: waste of human resources, retirement, mental health and education. Health care and financial independence emerge as major concerns. Focus is on the context of social welfare versus self-help approaches and the need for more precise ways to describe the population. A functional definition is proposed in which an aging index is derived from measures of physical status, psychological well-being, economic stability, socialization, life satisfaction, and chance factors. A taxonomy of work and aging is then outlined which presents a systematic way to identify and state researchable questions concerning various groupings of older persons and the work conditions which may provide available work options for them. The taxonomy assumes that people experience the aging process differently, that the aging process is developmental, and that people operate at functionally different levels of ability and efficiency, and that people regardless of age, at different points in time and for different reasons, have needs for paid and/or unpaid work activities and associations. A final section presents implications for federal policy on aging, retirement, mental health, and education) calling for major research efforts to bring clarity to the issues raised. (JT)

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AGING AND WORK IN AMERICAN SOCIETY

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## Executive Summary

The primary objective of this monograph is to examine four major issues confronting the growing number of older individuals in American society as these issues are related to work. The four issues, examined within the context of this work, are: (1) Waste of Human Resources, (2) Retirement, (3) Work, Aging and Mental Health, and (4) Education. Results of this examination suggest that little is known or understood regarding the aging process and its relation to work, though there is considerable speculation on the subject.

Two major observations emerge when seeking resolution to a better understanding of the aging process and work. They are: (1) the health concerns and (2) financial independence concerns of older persons. Loss of good health for older persons often means a loss of independence, which in turn affects earning ability. The result is dependency on the social welfare system for essential health care. Medical technology is making huge strides in increasing human longevity, but the social welfare system is such that an old person must border on pauperism to take advantage of available health services and facilities. This, and other inadequacies in the system, have produced an atmosphere in which health service deliverers, both physical and psychological, seem insensitive to the often degrading human suffering experienced by old people who need their services.

A second observation concerns the financial independence needs of old people. Old people must depend upon others for goods and services when they are without sufficient financial resources. This dependence, often coming after a lifetime of providing for themselves, can cause further complications

such as loss of independent decision-making ability and loss of the relaxation of retirement. The irony here is that many older people who can and wish to maintain their financial independence through some form of employment are restrained from doing so. Current programs (federal, as well as some private) are designed to deprive old people of some portion of their financial entitlements should they elect to stay employed and earn what is considered too much. This can represent a severe penalty for those older people who have made a lifetime contribution to the nation's economic progress and have attempted to secure financial independence in retirement through savings plans, retirement programs, and the like. The literature reports many observations that old people are often forced to behave in ways that compromise their moral and ethical values (e.g., living out of wedlock, working surreptitiously, and the like) in order to preserve some semblance of financial independence and autonomy over their lives.

As the issues concerning aging in America begin to be clarified, there emerges a parallel concern as to the definition of "old." Current definitions assume that a chronological age criterion is both necessary and sufficient in dealing with these issues and concerns. This issue is explored in some depth and a theoretical definition is presented which takes into consideration the functional ability of older persons. However, in order to test the utility of this functional definition, a taxonomy of aging and work is conceptualized within which research may be conducted. It is expected that research which supports or refutes the taxonomy's parameters will enhance understanding of the aging process and work. Thus, this monograph's final

section presents implications for federal policy on aging, retirement, mental health, and education, and calls for major research efforts to bring clarity to the issues raised earlier.

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## CHAPTER I

### INTRODUCTION

During the past several years an increased concern with an aging population has emerged in American society. The published literature on aging has repeatedly documented the fact that Americans are getting older. A cursory review of population distribution statistics reinforces the view that a trend toward an aging American society will continue well into the next century. The decline in America's birth rate during the past decade suggests an abatement in the youth movement experienced during the 1950s and 1960s. The effects of this decline in terms of a reduction in the number of individuals entering the labor force will be felt during the 1980s and 1990s. The result may well usher in a new era of the older American -- or as Walfang (1978) noted, a "gerontocracy." The lowered birth rate trend combined with an increasing older population suggests the emergence of political, economic, and social issues associated with aging not previously experienced to any great extent in industrial societies, especially, in the United States. These issues are expected to become magnified with time as the post World War II babies begin to enter the ranks of the aged (Califano, 1978).

The issues associated with a population of increasing age seem to have gained recent prominence from at least two sources -- first, the 1971 White House Conference on Aging which brought a major nation-wide focus to the plight of a disenfranchised segment of American society (Pratt, 1978). As an outcome of this focus and the

resulting recommendations sent forward to the President of the United States, Congress enacted legislation which amended the Older American's Act (Public Laws, 92-258, 93-29, 95-478) and the Age Discrimination in Employment Act (Public Law 95-256), among others. This congressional action has resulted in the establishment and expansion of numerous social services to assist the aged, e.g., nutritional programs to feed the more frail elderly, funding programs for training cadres of professionals to work in the field of aging, increasing social security entitlements, initiation and strengthening of various advisory councils and federal bureaus such as the Federal Council on Aging and the Administration on Aging. This congressional action is a recent visible demonstration of governmental concern, involvement, and recognition of current and future issues associated with aging and an aging population. Government has become progressively involved in the concerns of the aging over the past several decades. The dire poverty being experienced by older persons which was a result of movement toward industrialization (Wiebe, 1967) and the onset of the depression in the 1930s visibly demonstrated a need for some form of "insurance" upon retirement from the labor force. This need culminated in the enactment of the first Social Security Act of 1935. Less visible, though no less important, have been the progressive involvements of state and local governments, e.g., governors' commissions on aging, state and local mental health centers, local housing, hot food programs. In addition, there has been considerable public sector involvement primarily through development of improved private pension plans, pre-retirement planning programs, and

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expansion of private nursing home facilities. Thus, as a result of the 1971 White House Conference on Aging (which created a national awareness of those issues and problems which needed immediate concern), a broad base of support for assisting older persons has emerged.

The increased visibility of older persons due to their increased numbers also contributes to a national awareness of society's concern with aging. Their sheer numbers, as well as the skyrocketing costs associated with the support and maintenance of this group, especially those retired persons whose sole income is Social Security, have made this an issue of national significance. By association, people reaching retirement age are implicitly and/or explicitly defined as "old" regardless of the age at which retirement from paid employment is initiated. Kahl (1976) reported that in 1900 there were 3.1 million people 65 years of age or older in the United States. By 1950 that figure had reached 12.3 million; by 1970 it was 22.3 million, and by the year 2000, she estimated that the 65 years or older group will reach 30.6 million persons -- 20% of the population. Both Hriceniak & Mannebach (1978) and the Department of Health, Education, and Welfare (1978) have speculated that this 30.6 million figure could be even higher given the availability of improved nutritional programs for large numbers of individuals, generally improving physical health of people, popularization of programs designed to encourage good health practices and physical fitness, and the real possibility of medical breakthroughs which will cure deadly

diseases such as cancer. Time Magazine (1979) estimated that in 1979 the combined financial outlay for old age assistance, health, medicare, and disability will amount to 135 billion dollars, and that by the year 2000 this amount will exceed 800 billion dollars. Califano (1978) reported somewhat lower financial expenditures for 1978, (112 billion dollars) and estimated 350 billion dollars for the year 2000. The discrepancies between the Time Magazine report and Califano's report seem to be due to differences in the types of expenditures included in these summary figures. Levitan (1978) estimated that 40% of the federal budget will be used to support the 30.6 million persons who Kahl asserted will be age 65+ in the year 2000. The magnitude of these figures is sufficiently large to raise concerns regarding society's relationship to a growing aging society. (One may question the accuracy of these figures since accuracy is dependent upon those data sources one elects to cite. The contention here is that given our current economic situation, the dollar cost for maintaining older persons, and the sheer number of persons involved, warrant our concern.) Finally, when the large wave of 1940s and 1950s babies reach retirement age, concerns attending their change in age status will be magnified, especially as these concerns are mirrored in labor force participation rates.

Currently there is a broad based recognition that we are an aging population, that we will continue to get older as a society, and that issues associated with this life stage will become magnified as a result of the increase in this group's size.

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Problem

Researchers, practitioners, and policy makers lack an extensive and systematic examination of the concerns of the aging. Such an examination would suggest long-term research and program directions as well as future policy determinations associated with aging and work in America (Our Future selves, 1977). The primary focus in dealing with aging issues in the United States has been to devise programs and activities which assume doing "to" or "for" the aging population. As a nation, we have concentrated on developing and maintaining a series of social welfare programs for old people. Very little time or attention has been devoted to designing policy strategies and programs which involve doing "with" aging persons. Such helpful documents as the Federal Council on Aging's Annual Report (1977) relate some efforts in this direction and suggest some future possibilities. However, there seem to be very few systematic examinations of issues surrounding the relationship of aging and work as an avenue for self help. (Exceptions seem to be discussions presented by Buter, 1975 and Sheppard & Rix, 1977). Perhaps one reason this issue has not been of major concern in the past is the relatively recent observable increase in the numbers of persons in the older age group, with the attendant increase in the costs of maintaining this group. Another possible reason for previous lack of concern has to do with defining the group in clearer terms and coming to grips with their diversity.

It is erroneous to continue to assume that an aging American population is a homogeneous group. (Federal legislation

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appears to assume that all aged persons are homogeneous as a group by virtue of their chronological age, although some recent legislation, e.g., the legislation providing for "meals on wheels," and the Volunteer Service Act, suggest that our policy makers are beginning to realize that there are exceptions to this view of group homogeneity.) What is generally forgotten as people enter the ranks of the aged is that they come from widely diverse backgrounds, experiences, and life styles. It is the combination of these factors which determine their heterogeneity. Butler (1975) has suggested that the aged, rather than becoming more similar as they age, in actuality become more diverse with advancing years. Given the multiplicity and diversity of concerns with an aging society, the visible increase in the number of older persons, and the economic and productive needs of society, it is appropriate at this time in history to examine issues surrounding older people as they relate to work in American society. Through such a research focus, policy makers, researchers, and practitioners can devise appropriate strategies for making long-term future decisions.

Implementation of recent guidelines (Age Discrimination in Employment Act, 1978 Amendments, Public Law 95-256) prohibiting employers from discriminating in their employment practices against those persons between the ages of 40 and 70 has apparently clouded the issue of who is or is not considered aged and/or old. It has also created a degree of consternation in the business community with regard to retention, promotion, and retirement policies (Sonnenfeld, 1978). The popular American definitions of aging people assumes that they are a homogeneous group characterized by chronological age. Since this

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has generally been the case, at least for legislative purposes, social and economic programs designed to assist older citizens have been assumed to be uniformly applicable for all individuals who meet the chronological age criterion. This view has generally resulted in the following: 1) a tendency to mask political, social and economic issues associated with aging, 2) a lack of cost efficiency in programs designed for the aged, 3) lack of a coherent and coordinated federal policy on aging stemming from a short sighted congressional approach to the problem, and 4) widespread uncritical acceptance of the notion that at some point in time individuals who reach a certain chronological age are to be set aside from the mainstream of society, ostensibly to make room for others, (e.g., Toffler's (1970) "throw away society.") This last point is a somewhat jaundiced and inhumane view of those persons who contributed their work, energy, and money to the development and expansion of today's society which has allowed Americans to enjoy a living standard unparalleled in history.

Along with the increase in numbers of older Americans and the prospect of living longer is a pervasive belief that persons who reach a certain "magic age" can no longer be productive and contributing members of society especially in the arena of work. Older Americans are caught in the time trap of "obsolescence," which Wirtz (1975) referred to as "... a human convention that became a reality because it first became custom" (p. 7). O'Toole (1977) identified this "time trap" as "Retirement, the activity of the aged,..." and went on to assert that this activity "... occurs increasingly in



'leisure communities' cut off from the rest of the world, both spiritually and physically" (p. 24). Both these views assume that the "linear life plan," referred to by Stern & Best (1977), is a functional way for society to behave and that all persons go through life in a similar, linear fashion -- education for youth, work for adults, retirement for the aged. More importantly, the linear assumption leads to a "reactive" style of problem solving -- dealing with problems as they arise -- rather than a "proactive" style which anticipates problems in terms of developing programs and activities based on available knowledge, e.g., population statistics. In a discussion about older persons McClusky (1971) referred to our traditional approaches as essentially "pessimistic" which assumes a role of doing "to" or "for" people. A more "optimistic" approach is that of working "with" people in order to identify and/or solve problems. At a time in American history when the political atmosphere appears to be fluid, when world unrest is a constant threat to a stable society, when the nation's economic well being seems to be threatened, and when social problems such as high unemployment and inflation abound, can we afford to assume that older Americans can no longer be productive and contributing members of society or that all persons age in a linear fashion? Perhaps we have not been creative enough in conceptualizing and developing programs that will foster a change in attitudes -- that will prevent society from throwing our older citizens onto the "slag heap of life," or that will foster doing "with" rather than doing "to" or "for." Perhaps we need to shift more toward strategies which will encourage



the redesign, where necessary, of creative ways to recycle and reuse this increasingly large natural human resource which we call "aged."

It is a fundamental assumption of this monograph that, the so called "aged" are an important resource who are needed in order to address, deal with, and seek solutions to the political, social, and economic problems confronting United States society. (The word "aged" is used because this term seems to be full of ambiguity and is defined idiosyncratically to accommodate the term's user.) How best to utilize this human resource is an enigma our society has been half-heartedly dealing with for the past half century.

#### Purpose

We need to develop long-term effective programs which are cost efficient, humane, helpful to governmental policy makers at national, state, and local levels, and which are effective in creating and maintaining supportive environments which encourage retention of our older citizens in contributing, productive, and worthwhile capacities. But before we can do this we must first define whom we are talking about. When there were proportionally fewer individuals in our older age group in relation to the rest of the population, chronological age appeared to be an effective and efficient definition of aging and an operational criterion upon which to award entitlements and seek solutions to the concerns of the aged. The tenability of this assumption is questionable for today's (and more importantly tomorrow's) problems and issues concerning older Americans.

Some of the major issues confronting American society as they pertain to aging will be examined in Chapter 2. The purpose for this examination is to set these issues in the context of social welfare versus self help approaches. In order to understand the definitional problems to be explored in Chapter 3 and to develop a taxonomy of aging and work to be presented in Chapter 4, a context will be established in which issues and related problems can be identified and explored. The definition and taxonomy sections will form a framework within which basic research concerning aging issues can be identified. Some of these research parameters will be outlined in Chapter 5. Finally, the implications of the dichotomy as described in Chapter 2 will be examined, relative to federal legislation and various social systems currently in place, as they impact the aging process.

## CHAPTER 2

### AGING AND WORK: SOME ISSUES OF CONCERN

This chapter will introduce the reader to some of the broader issues related to aging and work in American society and to some of the related questions which are yet to be resolved. Such an overview of the broad issues will serve as a foundation for the following chapters in this monograph.

#### Waste of Human Resources

Americans have become a "throw away" society (Toffler, 1970), especially during the past three decades. The availability of cheap energy combined with a high degree of affluence produced a social climate which nurtured this "throw away society." Given current energy problems, continued high inflation, and an apparently lowered worker productivity, we can no longer afford to throw away partially used up resources -- especially human resources. Instead we must identify, define, and explore strategies which maximize the potential of our natural and human resources. Engineers, chemists, product development personnel, and other specialists are currently engaged in recycling and reusing natural resources. However, are we doing the same with regard to our human resources? Apparently, our historical as well as our current behavior would suggest that we scrap our human resources at a given age whether or not they have been used up. Regardless of recent federal legislation to raise mandatory retirement

to age 70 (Age Discrimination in Employment Act, 1978, Public Law 95-256), current policy continues to evict people from the labor force, through either early retirement or retirement at a specified maximum age. On what basis do we arrive at such an arbitrary figure as age 70? Is this a federal policy that should be continued? The pressure to continue such a policy toward our older citizens and perhaps either directly or indirectly to lower the age 70 ceiling will be great as the vast work force known as the "baby boom of the 40s and 50s" exerts pressure within the work force for upward mobility and eventual retirement.

Psychologists, sociologists, anthropologists, and some economists agree that human beings gain their identity through work. Their self concept, sense of worthwhileness, their ability to enjoy many of life's satisfactions generally, find their roots in work (Kazanas, Baker, Miller, & Hannah, 1973). It is our older citizens who have lived by a strong work ethic, believed that hard work was the source of happiness and financial security, and struggled to help create the affluent environment in which we all live. However, the notion that by the time people reach age 65 (now age 70) they are all "used up" and are no longer productive contributors to society, and that they now need to rest and remove themselves from the "main stream," is no longer tenable. ("Main stream," as used here relates to the labor force and the social and personal interactions which ensue from active participation in the labor force.) If irrelevant now, how relevant was this concept, retirement at a specific age, when first

introduced in the United States in 1935 as part of our Social Security System? The concept of retirement was first set forth by Bismarck in German society during the late 1800s (Givens, 1978). Thus, the concept of the last part of life as a time for retirement from work in an industrial society is about 100 years old. It is an artifact, and/or attitude which has developed as part of industrial society's social systems. Should federal policy concerning the aged in today's (and more importantly tomorrow's) society continue to be predicated on an assumption that may no longer be tenable? Should our employment policies continue to encourage withdrawal from the labor force even though many older workers are physically and psychologically capable of continuing in the labor force as productive workers?

If we can define "old" as being no longer capable of being productive and contributing members of society, this assumes we can define "old" in terms not necessarily based on chronological age. However we choose to define "old," certain real questions exist; Can we afford to waste the knowledge, expertise, and possible productive potential of the aged? Can the market place of our economy find creative strategies whereby those "aged" who do not perceive themselves as such can continue to participate? Can this issue be resolved through a multi-disciplinary examination of the problems which eventually combine in terms of tenable alternatives? Is the solution essentially a political one with assistance coming from the business/industrial sector of our society? Can we redesign the work place in terms of time and space utilization to accommodate an increasing aging



population? The related issues seem to be macroscopic and they continue to grow. One cannot help but speculate for how much longer we can afford to examine and deal with societal induced aging problems in a microscopic fashion and continue to waste a large cadre of human resources.

### Retirement

The concept of retirement is an aberration of modern industrial societies. As stated earlier, the concept of retirement from the labor force was introduced approximately 100 years ago in Germany by Bismarck and was later adopted in the United States as part of the Social Security Law in 1935. Givens (1978) and Sheppard (1978) both remind us that the age 65 custom for retirement is arbitrary and emerged because life expectancy at that time was approximately 65 years. Since few people at that time were expected to live beyond age 65, costs for maintaining such individuals over time were not expected to be prohibitive. However, given the continued improvement in mortality rates since 1935, the figure of age 65 for retirement seems no longer tenable, both in terms of loss of productive manpower and financial costs to society. In addition, the constitutionality of any form of mandatory retirement under the Fifth and Fourteenth Amendments is beginning to be questioned (Sheppard, 1978).

Other critical questions emerge concerning retirement from work. With the rising cost of living, retired persons living on fixed incomes, which are inadequate to begin with, will continue to

experience a significant reduction in their purchasing power which in turn affects the quality of their lives. If society determines that the population of non-working older Americans should have an adequate retirement income, will we as a society be willing to continue to provide that financial support? Or will strong resistance emerge with the realization that it means higher costs to those who are employed (Sheppard & Rix, 1977)? There are some concerns currently being raised throughout the United States related to recent increases in Social Security deductions from employees' pay checks and increases in the contributions required by employers. This action is reflected in reduced purchasing power and increased living costs for all age groups.

The issues surrounding any form of mandatory retirement keep emerging. They have never been really resolved satisfactorily. As society continually experiences economic unrest, political fluidity, and resistance toward increased living costs, questions associated with the removal of a segment of the labor force from active participation continues to be a topic of concern in one form or another. The lack of resolution of these issues is related to the issue of chronological age versus functional age as the determinant of who should or should not be retired. What is really needed is a clear and unambiguous definition as to what is meant by "aging," "aged," and "old age" so that we can be more precise in resolving the many conflicts and sometimes divergent and counterproductive views and actions concerning the aged. The 1971 White House Conference on



Aging indirectly alluded to definitions of these terms when they described the "Stages of Later Life" (Toward a National Policy on Aging, Vol. I, 1971, p. 10). But they, too, fell short when it came to a precise and unambiguous definition of these terms.

### Work, Aging, and Mental Health

It has been asserted that "...the mentally healthy person feels he is leading a rewarding life and esteems himself" (O'Toole, 1973, p. 82). This "rewarding life" and "self esteem" about which O'Toole is referring is related to work satisfaction and a person's perception of his or her productivity and worth as a worker. Brown (1977), in describing the Senior Skills Center in Santa Rosa, California, found that "Retirement is not a blessing for most seniors. It's either an emotional or financial rip-off. They're tired of living in a dependent relationship with bureaucracy and society" (p. 19). We know from human development psychology that "feeling good" about self and feeling as if one is contributing to society are lifelong processes which foster positive mental health in people. Current notions surrounding retirement, social programs such as "meals on wheels," and society's negative attitudes toward apparently non-productive (not working) persons which foster the dependency relationships about which Brown was referring, are hypothesized to be counter-productive to the continued positive mental health of our older citizens. As has been pointed out throughout much of the literature on work and living, most people find and express their identity through work for

which they perceive a psychological and/or financial reward (Kazanas, et al, 1973). Finally, Bütler (1970) has warned us that "One of the greatest dangers in life is being frozen into rigid roles that limit one's self-development and self-expression" (p. 124).

It may be concluded that to reach old age or to be perceived as being old tends to place an individual in a given role category of development. The only exit from this is death. Walfgang (1978) reminds us that there are differences between "the elderly" and "old age." "Senescence is normal; senility is a disease. Growing old is normal but aging is not..." (p. vii). Even participants in the 1974 White House Conference on Aging assumed a degree of role fixation of the aged and projected the assumption that all older persons belong in a similar category. This is evident in the section on Mental Health Care Strategies and Aging. The recommendations contained in this document reflected only mental illness and never once mentioned or alluded to the mentally healthy older person (Toward A National Policy on Aging, Vol. II, p. 111-113). The introduction states that among the aged "Mental impairment and a wide variety of functional disorders are common" (p. 112). However, the "mental impairments: and "functional disorders" to which they refer and the persons they perceived to suffer from these dysfunctions are never defined or clarified. If the latter view is correct, one must ask why? How did an apparently healthy group of persons suddenly start suffering mental impairment? Perhaps some alternative theses to a "mental impairment" view need to be explored.

When moving from a working to a non-working status upon exit from the labor force, many people experience an abrupt shift in the way they have lived their lives. As a result of this changed status, it can be hypothesized that some of these older persons suffer from an identity crisis, which can contribute to many forms of mental impairment such as depression, loneliness, neuroses, a sense of isolation, guilt, and so forth. (The "identity crises" phenomenon and attending behavioral characteristics which some would define as non-normal has been generally associated with males. With increases in the female labor force and increased numbers of female heads of households, this phenomenon may also become a "female" characteristic.) Thus, instead of adopting a mental impairment view of aging we might direct greater effort toward assisting older persons to maintain their identity through productive work for as long as possible. If we accept this view, we would need to develop numerous work options and alternative modes for older persons to participate in and contribute to society in order to accommodate what was referred to earlier as the heterogeneous nature of this group. Under this view a person can continue to be employed and/or productive in activities while at the same time making use of various self help strategies in moving from one developmental cycle to another. This movement from one developmental cycle to another, or "gradual separation concept," is the time when an individual is engaged in various life transitions, e.g., different socialization patterns, realignment of income sources and expenditures, maintenance of self worth, continued control over one's life, reduced dependence on family or social welfare

systems, and so on. At this point an individual can decide to view retirement as either a movement from one activity and life style to another or as a terminal event in his or her life.

The concern with the aging population's mental well-being as it relates to work has been alluded to both here and elsewhere in the literature. However, there seems not to be available any systematic inquiry into this issue to date. Although the psychological well-being of the older population is of obvious concern when one reviews the gerontological literature, most approaches to dealing with this issue are primarily concerned with doing "to" and "for" (which assumes pathology) rather than exploring what can be done in a more healthy and positive way "with" the aging. It would seem worthwhile from a political, economic, and social vantage point as well as a psychological vantage point to examine the implications of mental health, aging and work in America.

#### Education - Work

A final issue to be introduced briefly concerns the relationship of education and work to aging. Currently, it is in vogue to talk about lifelong learning, futuristic education, adult education, and the like as this concept of education is related to adult development (Broschart, 1977; Christoffel, 1978; Cross, 1978; Department of Health, Education, and Welfare, 1978; Gross, 1978; Hechinger, 1975; Kurland, 1978). The linear concepts of aging referred to earlier (e.g., youth for education, adulthood for work, old age for retirement) will become

more and more obsolete as these newer educational views become an accepted part of our social and economic systems. The shift in most work settings from an emphasis on physical output, demanding arduous work, to less physically demanding machine work has contributed significantly to a reduction of the human energy drain. As a result we have experienced a corresponding rise in available time and energy to engage in more personally satisfying activities. One reason for the increased interest in adult education activities and a manifest concern with lifelong learning is the increased physical and psychic energy available to people as a direct result of machines doing their physical work. However, as more sophisticated and efficient machinery is developed to perform the menial tasks previously performed by workers, there has come a corresponding rise in the demand from business and industry for ever increasing numbers of skilled and knowledgeable workers. Adults have turned to education for help in keeping pace with the increased rapidity of technological change, which tends to make previous knowledge and skills obsolete during a person's work life, and for help in retaining their place in the labor force.

Those persons who must leave the labor force due to forced "lay offs," forced early retirements, or job obsolescence may perceive themselves as being too old to reenter the labor force in another capacity, or their belief in the "linearity of life" concept leads them to drop out of the labor force by either retiring or not continuing to look for work. Our current educational structure does not

encourage these older workers to attempt retraining for other jobs or to seek changes in their work patterns. (See Wirtz, 1975, Chapters 6 and 7 for an extended discussion of this latter concept.) This lack of encouragement results in a loss of productive potential for the nation's economy, reduced incomes which can adversely affect a person's retirement income, and in some cases, dissatisfaction among older citizens with regard to what is happening to their lives. The political consequences of this form of dissatisfaction are only recently being manifested (Ragan & Davis, 1978) and may be magnified as the ranks of our older population increase with time. Reduced income as a function of age and education and the attending problems resulting from income reduction have been well documented by Brennan, Taft, & Schupack (1967) and Wirtz (1975). Apparently our current education system "... has failed to meet the needs of older persons. It has not helped them anticipate or deal with the stress of human development in the later years of life. It has failed to help both middle-aged and older persons learn new skills or adapt old ones, thereby denying them the opportunity to contribute to society as members of the work force or as skilled volunteers" (Department of Health, Education, and Welfare, 1978, p. 42).

Older persons are not yet participating in educational programs to any great degree in comparison to the rest of the population despite the apparent increased availability of these programs. It has been estimated that those persons age 55 to 64 represent 6.3 percent of adult participants in educational programs and those persons 65 and over only 2.8 percent (Harris and Associates, 1975). There appear to

be several reasons for this lack of participation; the social bias that education is for youth, admission policies in higher education institutions that tend to discourage applicants who are over 40, physical limitations, inadequate transportation, lack of money, inappropriate class scheduling, and others (Harris and Associates, 1975). There is also the view that older persons do not have as much basic education as younger persons; thus, they are unable to compete in the learning activity. However, discrepancies in number of years of schooling currently observed between the young and the old should diminish in importance as our more highly educated population matures to the older age groups.

The same barriers and negative views which tend to discourage older persons from taking advantage of educational opportunities operate similarly as barriers to older people entering or returning to the world of work (Webber, 1978). Many older persons are not aware that there are jobs available to them. Often they feel they are "too old" to work and feel that the skills mastered during a 40+ year work history are no longer applicable or acceptable in the current labor market. Given the trends toward improved health, increasing educational levels among the older population, the diversity of this cohort group, a continued trend toward early retirement regardless of recent modifications in the Age Discrimination Act, 1978 Amendments, increasing inflationary factors which adversely affect a fixed income group, and the very real possibility of living 10, 20, 30 or more years past retirement age, it is conceivable that many of our older

citizens will wish or need to seek new or second careers (Webber, 1978). If such is the case, then education for reentry of older workers into the labor force will become a necessity, and new and diversified education-work programs that are nationwide in scope will be needed.

Some programs which involve older Americans in education and work activities show promise and are currently in operation or are being recommended (Brown, 1977; DeCrow, 1978; Kahl, et al, 1976; Youry, 1975). However laudable these efforts, they only point the way toward possible nationwide programs and cannot be construed as the answer to all the questions. What is lacking with regard to education, work, and aging is a national policy which reflects a positive attitude -- that education and the business/industrial components in our society can combine to identify new and creative ways to involve older citizens in the productive activity of work.

#### Conclusions

The issues presented in this chapter only reveal the "tip of the iceberg" with regard to aging and work in American society. What is clear is that these problems have enormous implications for our society. We can expect them to become magnified during the first quarter of the next century as the numerical increase of older citizens becomes more and more evident. What is not clear is how we as a society will confront problems associated with aging and work. Will we as a society continue present practices and assume that the current and future work force will assume the financial



burden of an aging population who are living longer? Will we continue to pay lip service to the idea that aging with dignity is an important value concept of our society? Will we begin to devise new and more encompassing national policies concerning aging and work? Will the leadership for new policy formulations come from the federal government, local and state governments, business, industry, education, private philanthropy? The solutions no doubt will need to encompass all these groups as well as other components of society not previously identified. Regardless, it is obvious that new and creative thought is needed to address what is becoming a major national, political, social, and economic issue.

Apparently we have been attempting to resolve aging problems through enlargement of our social welfare system. This approach has resulted largely from the influence of the 1961 and (to a greater extent) the 1971 White House Conferences on Aging. Recommendations emerging from these conferences focused heavily on federal government involvement in programs, financial support and entitlements, services, and the like. These recommendations resulted in legislation which allocated funding for a variety of services and support mechanisms, e.g., Medicare, Medicaid, meals on wheels, volunteer services programs, transportation. However, it is still somewhat unclear exactly which age group(s) this legislation is supposed to affect. Two apparent contradictions seem to emerge when one reviews the different pieces of legislation which resulted from these conferences:

1) Federal legislation, depending upon the services to be provided, define the aged in terms of chronological age which can range from 40 to 65+. 2) Federal legislation assumes that the aged are a homogeneous group by virtue of the fact that they have reached a certain chronological age; thus the aged are considered as a single group without regard to functional differences within the group. Apparently some recognition that people age differently is emerging at the federal level, but this tends to cloud rather than clarify a federal policy on aging.

The "social welfare" approach followed by our federal and state legislative practices seems to ignore a self help view toward resolution of problems and fosters an uncoordinated set of services under the auspices of several different federal and state agencies. A self help approach assumes that individuals, regardless of age, are able to govern their own daily lives so long as our political, economic, and social institutions and systems do not act as barriers. It assumes that individuals are able to behave in responsible and productive ways. There are, of course, some individuals in our society for whom a "social welfare" approach is necessary. Among this group are those whose inability to make rational decisions adversely affects others (our courts generally make this determination), and the physically disabled or mentally impaired who are unable to maintain their basic needs. Individuals in this latter group are generally referred to as the "frail elderly," but apparently there are no accurate statistics as to the number of persons thus categorized. Our current

census data gathering procedures and Department of Labor Statistics rarely make any distinctions beyond age 64 when describing population characteristics. The approach these governmental agencies use assumes group homogeneity when describing the age 65+ group. Any reasonable interpretation of "frail elderly" from a functional aging viewpoint would conclude that persons in this category may be younger and/or older than age 65 depending upon the impairments which collectively define the term "frail elderly." We need more accurate information and more precise definitions in order to develop a more positive national policy on aging, especially as related to the aging person's active participation in America's labor force.

We have thus far alluded to many issues which are felt to be related with regard to aging and work. In a very real sense the issues are predicated upon elimination of economic barriers to the aged which tend to inhibit self help approaches and foster dependency relationships to federal programs. The main barriers to old people continuing as active participants in the labor force are directly related to negative attitudes and myths about aging -- that the aged are slow, cannot learn, are physically unable to work, need rest, maintain rigid views and are not receptive to change, are senile. The list can go on and on (Butler 1978; Nydegger 1979).

A fundamental belief advocated in this monograph is that people find their identity and experience many of life's satisfactions through active participation in some form of paid or unpaid work activity. Education and reeducation are important for individuals to continue as

active participants in the labor force, especially as education and reeducation contribute to the paid aspects of work. Finally, it is feasible to assume that the mental well-being of individuals can be enhanced and fostered through education and work. For these assumptions to have a positive effect on our aging population we will need to change the negative attitudes and myths which have worked against the aging population's continued participation in the labor force. It is to these concerns and their attending issues that the conceptualizations, set forth as the remainder of this monograph, will be addressed.

## Chapter 3

### TOWARD A DEFINITION OF AGING

Several broad issues -- the waste of human potential, retirement, mental health, and education as they relate to aging and work -- were discussed in the previous chapter. What is seen to emerge from this review is the need for more precise ways to describe the population about whom we speak before long-term programs and policies can be effectively designed and implemented. With present and future increases in the numbers of people called "old," we need to reexamine some very fundamental issues: Do we as a society want to continue to treat the aged as a group to be set aside, whose expertise is no longer needed or wanted, or do we need to reexamine the potential of this group with regard to ways they can continue to contribute both to themselves and to society? The intent of this chapter is to examine the current practice of categorizing people as "old" through the use of a chronological age criterion, and then to suggest a procedure whereby we can design a more flexible view which takes into account the individual's capacity to function.

#### Current Views

The concept of who is or is not old, aging, or aged varies from society to society, age group to age group, and generation to generation. Shanas (1970) recalled that in India the official

beginning of old age is 55, whereas in the United States it is 65. (Perhaps with the full implementation of the 1978 amendments to the Age Discrimination in Employment Act, age 70 will now become the "official" beginning of old age in the United States.) Butler (1975) indicated that in the Soviet Union the official age of retirement (thus the assumption of old) for men is age 60 and for women age 55 whereas in Sweden it is age 67 regardless of sex. American youth during the recent past have talked about not trusting anyone over age 30, thus relegating approximately 50 percent of the population to an arbitrary "old" category, (Shanas, 1970). At the other end of the life span spectrum most Americans at the age of 70 "... continue to describe themselves as middle-aged" and it is not "... until after they have reached the age of 75 that more than half of all Americans describe themselves as old or elderly" (Shanas, 1970, p. 5). Categorical age differentiations based on the calendar, then, are influenced by social custom, legislative fiat, and/or attitudes projected by whoever is doing the defining. At best, views as to who is old or aging are becoming more variable as time progresses and as this age group increases numerically.

#### Social Custom

The chronological age of 65 as a criterion for defining old age is, for all intents and purposes, an administrative expediency which society has arbitrarily chosen and made customary. It was chosen largely as a result of Bismarck's social legislation concepts set forth in the late 1800s. The United States adopted this concept in 1935 with the enactment of Social Security. The purpose of establishing

the arbitrary age of 65 as the onset of late life was primarily to establish a point for retirement from the work force and thus to determine who would be eligible for services and financial entitlements. Chronological age has had its uses, and up until the past decade or two it has been a reasonably efficient criterion upon which to plan policy and service delivery systems. However, whenever an arbitrary criterion is set forth which serves as a definition of some category or attribute, inadvertent abuses often emerge. Not everyone is ready to terminate an activity such as work at an arbitrarily designated age. As noted earlier by Brown (1977) and Butler (1970, 1975), the chronological age or social definition of aging is perceived by older persons to be an "emotional or financial rip-off" and tends to place them into specific role categories. Older persons generally do not seem to appreciate this form of rigid labeling or encroachment into their lives regardless of their "condition or functioning" (Butler, 1975). Gerontologists have attempted to be more flexible and have "... divided old age into early old age, 65 to 74 years, and advanced old age, 75 and above" (Butler, 1975, p. 17). But they too have fallen into the "time traps," about which Wirtz (1975) referred, and have tended to place old persons into specific roles, maintaining chronological age as the traditional definition.

#### Legislative Fiat

A review of legislation enacted by Congress during the past several years seems to show that these policy makers have attempted to make a break with the chronological age syndrome as the criterion upon

which to base social service programs. But their efforts have fallen short, as does the statement concerning "Stages of Later Life" presented at the 1971 White House Conference on Aging (1971). The Conference's statement comes close to recognition of differential aging patterns but still relies on chronological age as a definition of a group characteristic.

An analysis of the Older Americans Act of 1965 (Public Law 89-73) and its various amendments over the years until 1978 as well as other selected legislation concerning services and entitlements of older Americans, suggests that policy makers are beginning to recognize that differential criteria are necessary when defining aging. For example, under the 1965 Older Americans Act (Public Law 89-73), Title III, Sec. 302 (2) under "Allotments" explains that states will receive funding for that proportion of the population age 65 or older. Under the 1969 amendments to this act (Public Law 91-69) Sec. 304 (2) and (4) (c) the age 65 designation remains as the definition of aging. In these same amendments Title IV, Part A, "Retired Senior Volunteer Program" Sec. 601(a) (2) and Part B, "Foster Grandparent Program" Sec. 611(a) the recipient of services and opportunities are those persons age 60 and over. The "Nutrition Programs" enacted under the 1972 amendments are also for age 60 and older (Public Law 92-258). The 1973 amendments (Public Law 93-29) Title IX, - "Community Service Employment for Older Americans" Sec. 902(a) uses age 55 or older for unemployed low-income persons, thus broadening the chronological age designation as well as recognizing a differential financial need of



some older citizens. Finally, the 1978 amendments (Public Law 95-478) under Title III - "Grants For State and Community Programs on Aging" Sec. 304(a) (1) and (2) use the eligibility age 60. However, while age 60 is specified under the 1973 amendments it is significant that Sec. 305(a) (1) (E) concerning eligibility of states to participate in Community Programs does not specify a chronological age but mandates that states "...provide assurances that preference will be given to providing services to older individuals with the greatest economic or social needs and include proposed methods of carrying out the preference in the state plan." Thus we again begin to see policy makers putting into law the recognition of differential needs of at least some older individuals. The only drawback is that chronological age is still the criterion on which eligibility for services and entitlements are predicated.

The Age Discrimination in Employment Act Amendments of 1978 (Public Law 95-256) further expand and broaden the chronological age definition by stating age limitations in Sec. 12(a) "The prohibitions in the Act shall be limited to individuals who are at least 40 years of age but less than 70 years of age." Thus we see that policy makers are beginning to recognize the differential nature of aging as a long term continuous process, but they reinforce the concept of being old by specifying the age at which persons are eligible for services and entitlements.

#### Social Attitudes

Apparently, there are two sets of conflicting attitudes expressed

toward older persons which are prevalent in American society, neither of which is necessarily related to chronological age per se. However, the assumption that an over preoccupation with chronological age as a terminus to work productivity acts as a negative attitudinal force against acceptance of older persons as part of American society has perhaps some face validity. Even though some would feel that the work ethic which has sustained both an agrarian as well as an industrial society is eroding or changing, there is still apparently a pervasive belief that if one is not gainfully employed in our society one has no worth (O'Toole, 1973, 1977; Wirtz, 1975). The unemployment of youth in our society is usually tolerated in the anticipation of their future productivity. However, the aged enjoy no such tolerance,

Butler (1975) has summed up the apparently conflicting attitudes of Americans toward older people. He stated:

We pay lip service to the idealized images of beloved and tranquil grandparents, wise elders, white-haired patriarchs and matriarchs. But the opposite image disparages the elderly, seeing age as decay, decrepitude, a disgusting and undignified dependency. Our national social policies mirror these conflicts. We talk earnestly about our "senior citizens," but do not provide enough for them to eat. We become angry with them for being burdens, yet we take for granted the standard of living that their previous work has made possible for us. Neglect is the treatment of choice, with medicine failing to care for their physical needs, mental health personnel ignoring their emotional problems, communities neglecting to fill their social expectations (p. xi).

How best to overcome these conflicting attitudes will become a major social issue in the future. Apparently, when using chronological age as the primary attribute to define "old," we only

emphasize the negative and foster a dependency relationship of old persons on a social welfare system (referred to in Chapter II).

### A Functional Approach

We have seen that social custom, legislative fiat, and attitudinal perception have defined who is or is not "old" in American society, although people who are thus categorized are resistant to being so labeled. This has been accomplished primarily through the use of chronological age as the criterion by which "old" is measured. Thus we relegate a segment of the population into an "age ghetto" (O'Toole, 1977). The only apparent exit from this form of categorization, given our existing mores, is death. What is generally avoided in any discussion concerning old people is that we are talking about our own futures. Is this how we want to be categorized and viewed? Must we be willing to settle for mere survival under such a categorization scheme when much more is possible? We must all grow old and eventually die. Real questions relate to whether this process will be "..., painful, humiliating, debilitating, and isolating through insensitivity, ignorance, and poverty" (Butler, 1975, p. 3) or will the process involve pleasure, dignity, maintenance of self-worth, and continued productivity and contribution to society? These, of course, are difficult issues, and it is not the intent of the monograph to attempt to resolve them. However, it is important to keep these issues in mind as they are related to a more functional view of aging which many writers allude to but few have attempted to set forth.

### Approaches to a Functional Definition

Perhaps one of the most comprehensive and promising attempts to identify the functional status of older persons has been offered by Maddox and Dellinger (1978). Their effort has focused on an attempt to assess a person's Social Resources, Economic Resources, Mental Health, Physical Health, and Activities of Daily Living. They have called these dimensions the SEMPA profile of functioning. SEMPA was developed as a result of a perceived need "... to develop information systems which are demonstrably useful for program evaluation, planning, and resource allocation..." (p. 60). The structuring of SEMPA concentrated on three essential elements.

- 1) A reliable, valid, quantifiable assessment of functional status which could be used to characterize individuals and, cumulatively, defined populations;
- 2) A systematic procedure for characterizing the types and qualities of services received by individuals in the defined populations;
- 3) A transition matrix for charting stability and change in functional status of a defined population over time in relation to types and quantities of services received (pp. 61-62).

Essentially, Maddox and Dellinger's effort was designed to assess the effects of social services extended to the elderly (age 65+), to examine the impact of these services over time, and to identify the functional status of those elderly persons receiving social services. The underlying assumption with regard to level of functioning, however, seems to be predicated on the state of impairment being experienced by an individual, since it appears that the subjects upon whom SEMPA

was tested were receiving some form of social services. Additionally, the measures used to assess an individual's level of functioning were those currently in existence designed for other age groups and which assumed a degree of face validity based upon the criterion to be measured. This raises a question of instrument reliability and validity since the authors admit that there is some concern as to whether these instruments are appropriate for use with an aging population. However, the authors report inter-rater reliability ranging from .74 to .88 on rating scales representing the five dimensions (SEMPA) which suggest a relative degree of acceptability of the measures used.

When Maddox and Dellinger applied clinical ratings to subjects from two communities, interesting data related to our purposes emerge. In the two groups they investigated, 58.5 and 56.7 percent respectively demonstrated no functional disorders on the SEMPA profile. When adding in those individuals who manifested at least one functional disorder the percent increased to 75.7 and 79.3, respectively. By extrapolation on the basis of the older population who were receiving some form of old age assistance, one can conclude that approximately 57 percent exhibited no functional disorders as assessed by clinical observers, and approximately 20 percent exhibited only one functional disorder. Of this approximately 20 percent, about 10 percent were identified as functionally debilitated in the area of Economic Resources. Thus, if the economic difficulties of this 10 percent were alleviated, we would then have approximately 67 percent of an older population who manifest no functional disorders and who need few, if

any, social services. They could probably function quite well on their own and could conceivably continue to be productive members of the labor force should they so desire. From a functional definition viewpoint, we can raise the question: "Is it legitimate to define these persons as old or elderly with all the social sanctions these terms imply? If they desire to enter it, should they be denied access to the labor force because they have reached some arbitrarily defined age?"

The GULHEMP Program (Youry, 1975) is designed to assess physical health, mental health, and personality of older (age 40 and up) persons. (Due to problems associated with personality measurement of older persons these dimensions have been eliminated from the GULHEMP Program.) The basic assumption in this program is that, regardless of age or disability, an individual can function productively in a job providing the job's demands are congruent with that person's physical capacity to function. The proponents of this program have demonstrated that a person can be employed once an accurate job profile is developed and the person's GULHEMP program is matched to it. The GULHEMP program is aimed toward a functional approach in assisting individuals to become active participants in the labor force. It follows a Parsonian (1909) approach (matching person to job) but in a more sophisticated way. Assessment parameters are more clearly defined than they were in Parson's time. The process employed involves knowledge about the person, knowledge about the job, and matching the person with the job.

The difference between the GULHEMP program and the SEMPA program is that one (GULHEMP) assumes that an assessment of a person's

functioning level will allow for a reintegration into the labor force whereas the other (SEMPA) assumes evaluation of an individual's functioning level is necessary to identify the impact of social services and planning for future services. Both views have merit. Both views suffer from and admit to a deficiency of measurement technology to facilitate the assessment of the functioning capacity of older persons. The SEMPA approach seems to assume that all persons who reach a certain chronological age will need and receive social services. Being able to assess the level of functioning of these persons will allow for more efficient planning and distribution of services. The GULHEMP approach seems to take a more humanistic approach in trying to identify a person's functioning level, since the objective is to place those persons who want or need to work in appropriate jobs.

It would seem that the GULHEMP and SEMPA programs clearly express two apparently contrasting psychological views in trying to deal with the issues associated with aging. GULHEMP appears to adopt a more humane view of aging. This approach assumes an individual is capable of being in control of his/her own life and, with a little help, the individual exerts primary control over external influences such as environment, social milieu, and institutional forces. SEMPA, on the other hand, seems to assume that social services are externally controlled environmental forces and are imposed on a person. This view leads to the development of service delivery systems and definitions of needed social services, based upon a view of the aging person as passive recipient.

If aging is a process we all experience, as we are told by psychologists, physiologists, gerontologists, and others, then how can we ever justify the arbitrary categorization of people into "age ghettos," especially those individuals who have lived the longest? It would seem that part of the definitional problem we are dealing with is predicated upon humanistic beliefs or self-help approaches vs. behavioristic beliefs or social service approaches. This dichotomy is at the core of the philosophical debate surrounding aging issues in the United States and especially issues associated with aging and work.

#### A Developmental View

The functional developmental view of aging which we are conceptualizing presupposes four basic assumptions:

- 1) Aging is not a point-in-time event. It is a developmental process all humans experience.
- 2) The aging process which affects everyone continues throughout a person's life span and includes all the physical, psychological, and social elements experienced in a person's life space.
- 3) The continuous process of aging is uniquely individual. People do not age similarly or at the same rate, e.g., while we all experience slower reflex actions as we grow older, we do not experience this slow down at the same rate or across an equal span of time.
- 4) The impact of environmental factors on life span development has a differential effect on aging depending upon physical health, psychological well-being, economic stability, socialization, life satisfactions, and chance factors.

Based upon the above assumptions, the following functional



developmental definition of aging is offered: The developmental aging process occurs in direct ratio to a slow down in physiological functions, the level of psychological well-being, the degree of economic stability, the degree to which one maintains social activity, perceived life satisfactions, and chance factors over which the individual has no control such as deep economic recession, catastrophic wars, and/or rampant inflation. The degree to which an individual perceives and/or experiences this slow down and the manner in which the slow down is accepted as part of living is a function of what might be termed an "Aging Index." We can hypothesize that the more harmony one experiences in terms of the elements of this definition the more uniform is the aging process; that the more an individual is in control of his/her life, the less need there will be for social services to maintain that person. External assistance should be needed only when an individual experiences significant uncontrolled disruptions in the elements of the aging process. However, what has yet to be resolved is the question: What is the range of functioning within which persons can independently maintain control of their lives, maintain their independence, and continue to develop productively while experiencing the aging process? Our current methods of implementing retirement systems and developing and offering supporting social services when people retire from the work force assumes an attitude that people reaching age 65 or 70 no longer have much capacity for self maintenance. Existing programs assume that at this age they begin the process of dependence on our social service systems and are suddenly perceived as "old." The truth of this last assumption has yet to be ascertained.

The SEMPA program of functioning referred to earlier includes several of the elements in the definition presented above, as does the GULHEMP program. However, the application of SEMPA to two populations did not include an assessment of the range of tolerance within which one can live and function independently from social services nor did it include the assessment of individuals who currently function independently from social services and are 65+ in age. In order to test the assumptions of our proposed definition it would help to specify an operational definition which has testable characteristics, is applicable across a wide range of individuals, and whose attributes are definable at least to some degree. The proposed definition can be specified as:

Aging Index = Physical Status (PS) + Psychological Well-being (PW) + Economic Stability (ES) + Socialization (S) + Life Satisfaction (LS) + Chance Factors (CF).

or,

$$AI = PS + PW + ES + S + LS + CF$$

- where, 1) Aging Index (AI) refers to a sum score when combining the six attributes in the equation.
- 2) Physical Status (PS) refers to bodily functions, e.g., strength, reflexes, lung function, blood circulation, liver function, muscular coordination, etc.
- 3) Psychological Well-being (PW) refers to one's self perception, usually referred to as self-concept, and the degree of psychopathology one manifests.
- 4) Economic Stability (ES) refers to level of income necessary to maintain one's financial independence in society.
- 5) Socialization (S) refers to the degree to which an individual

continues to actively participate in his/her environment and with others in that environment.

- 6) Life Satisfaction (LS) refers to how happy one is with his/her life now and what one anticipates in the future.
- 7) Chance Factors (CF) refers to those historical events in one's life space over which he/she has no control, e.g., war, extreme inflation, economic depression and/or recession, and which can positively or adversely affect elements two through six.

This is not an easy formula to quantify since several of the elements contained within the formula cannot be adequately measured with our existing assessment tools. This operational conceptualization suffers from the same shortcomings identified in the SEMPA and GULHEMP programs. We suffer from a serious deficiency of measuring tools which can assess the dimensions of individual functioning for older age groups. However, this should not deter us from conceptualizing the problems and articulating those areas where we find deficiencies.

We can measure Physical Status. The measuring tools used by physicians are quite adequate, reliable and quantifiable. What is not clear is which measures are most appropriate to measure physical status for our equation.

Psychological Well-being is another domain where a considerable body of data on measurement exists. The weakness here is the lack of data on the use of these instruments with older people since most of the available instruments were developed for use with younger persons usually age 16 - 35 or 40.

Economic Stability is easily quantifiable from one perspective --

that is, we can specify the amount of income one has at any point in time. More difficult to assess is the degree of adequacy of that income to provide a stable existence and self maintenance given a fluctuating economy.

Socialization, Life Satisfaction, and Chance Factors are not so easily quantifiable. It is possible that Socialization and Life Satisfaction data will have to be gathered through an interview format or questionnaire. It is also possible that some form of a semantic differential instrument would be a more convenient format for data gathering. It is perhaps the most difficult to both identify and to measure Chance Factors. For instance, how would we quantify the impact of a six percent rise in inflation on the process of aging as we have defined it? At this point we are apparently left with gross judgements.

The quantification problems of assessing the process of aging are many; they are not necessarily impossible to solve. The main problem is that we have not really begun to address the issues and attempted this form of assessment, although Maddox and Dellinger (1978) have made just such an attempt. A theoretical and operational definition has been presented above. Other writers and researchers will undoubtedly address this issue in the future, but what is abundantly clear is that at present there is a paucity of research in this area. Thus, we are left with certain inferences which are based upon fuzzy definitions. It is hoped that the proposed theoretical and functional developmental definition presented in this section will at least stimulate thinking and research designed to bring more clarity to present and future

definitional problems concerned with issues, problems, policy formulations, service delivery systems, and research concerning old persons in American society. Perhaps through validation of our proposed definition it may be found that some persons who are chronologically "young" are in fact old where as some persons who are chronologically "old" are in fact young. Who then should receive the social services and financial entitlements designed for the "old"?

## CHAPTER IV

### AGING AND WORK: A TAXONOMY

Thus far in this monograph we have alluded to the many myths about aging which were eloquently described by Butler (1975) and summarized by Nydegger (1979). We have referred to these myths especially as they affect the utilization of human resources, influence the mental health of the aging, and interfere with training and retraining for employment purposes by failing to encourage the use of available educational resources. Finally, we have suggested that individuals gain their identity in society, experience their self satisfactions, and perceive themselves as worthy through recognized paid and/or unpaid work.

An overview of definitional issues and related problems associated with clarifying how aging is defined was presented in the last chapter. An attempt was made to formulate a functional definition of aging which assumed that aging is a developmental process experienced by all human beings and not a point-in-time event as implied by legislative fiat or social custom. We further assumed a humanistic view within the context of our definition and then offered a formulation to operationally test the theoretical definition. However, testing a functional developmental definition of aging is difficult because of the paucity of adequate instrumentation to accurately assess those attributes collectively defined as an "Aging Index." Regardless of the psychometric problems inherent in our definition, a theoretical framework

around which theoreticians and researchers can function was presented in the anticipation that future research would solve these psychometric assessment problems.

In this chapter we will explore a taxonomy of work and aging which assumes that people experience the aging process differentially, that the aging process is developmental, and that people operate at functionally different levels of ability and efficiency. Our taxonomy also assumes that people, regardless of age, at different points in time and for different reasons have needs for paid and/or unpaid work activities and associations. The proposed taxonomy of aging and work which follows is an attempt to account for those differing work needs of aging persons as has been alluded to throughout this monograph and to bring further clarity to our definitional problems described in Chapter 2. These differing needs as they correspond to our proposed definition are perceived to be related to such attributes as economic well being, self sufficiency of living, physical and psychological health, satisfaction with life, productivity, and the like.

#### The Taxonomy

A taxonomy is generally formulated to allow researchers and/or theoreticians to systematically study, describe, and examine a subject of concern on the basis of variable(s) of interest according to attribute(s) which the subject displays. The taxonomy allows the researcher/theoretician to categorize the subject in some logical way. The subject about which we are concerned is people who are aging. The variable of concern is work. The major attributes are the need or desire to

work when an individual is classified in different age groupings and the functional ability of the individual to work. Thus, older persons (subject) who express a desire or need to work and who have the functional ability to work (attribute) may be classified into sub categories (work groups). The usual format for categorization of plants and animals into a taxonomy is not necessarily applicable in this case. The available data which characterize the extent of our knowledge are not as precise as those which characterize systems which have evolved in the physical and biological sciences. However, such deficiencies in data precision do not negate the worth of attempting to categorize individuals into logically determined and precisely defined groups for particular reasons.

Some of the existing data can be combined with the observations presented in Chapter 2 and used to fill some of the knowledge gaps encountered in our proposed taxonomy of aging and work. These data (see Tables 1 and 2) tell us that there are approximately 32,000,000 persons age 45 to 65+ who are either in the labor force or who are seeking entry into the labor force. In addition, there are approximately 1,200,000 persons in the same age range who are unemployed. In total, these persons account for approximately one third of the 96,917,000 people age 16 to 65+ who were defined as the total labor force in 1977 (Green, Devens, and Whitmore, 1978). This group of persons age 45 to 65+ comprises a significant number of persons about whom we are concerned. As was indicated in Chapter 1, the number of persons in this age range is increasing and is expected to



continue to increase for the foreseeable future. Those data presented in Table 1 indicate that about three percent of the 1977 labor force is 65+. What is not known is: are they full or part-time workers? To which work group category, to be described in our taxonomy, and under what conditions do they function? Similar questions can be raised for the other age groups as can be raised for the job seeker groups identified in Table 2.

A relevant question at this point is, why would we want such descriptive data as asked in the above questions? One reason might be related to the issues and concerns articulated by Sheppard and Rix (1977) in their book The Graying of Working America and what training/retraining programs are or will be needed to maintain this "graying work force" in the labor force. It has been estimated that by 1995 the number of persons aged 55 and over will for the first time in history exceed the number of our school aged population (Apker, 1979). Britton (1970) estimated that by 1975 one half of the labor force would be over 45 years of age. With the rising numbers of older Americans it seems reasonable to expect that we will be experiencing an older work force and that we need new strategies to examine those problems which will emanate from these changing demographics. Another reason for developing more accurate descriptive data is the need for more complete and more accurate categorizations of persons as they are identified in a taxonomy. This will enable us to be more precise in studying the effect these persons are having on our society as well as the effect on these persons of the various programs designed to assist them. For our purposes now it is enough to assume that work groups can

TABLE 1

## Labor Force by Sex and Age, 1977

Age Group	Males	Females	Total
45-54	10,231,000	6,698,000	16,929,000
55-59	4,328,000	2,746,000	7,074,000
60-64	2,717,000	1,622,000	4,339,000
65+	1,845,000	1,065,000	2,910,000

Source: Taken from Table A-4, Employment and Unemployment Trends During 1977, Special Labor Force Report 212, U. S. Dept. of Labor.  
Total labor force during 1977 = 96,917,000 ages 16-65+.

TABLE 2

Unemployed and Job Seekers by  
Sex and Age, 1977

Age Group	U*	Males		Females		Total	
		JS	U	JS	U	JS	JS
45-54	329,000	251,000	339,000	274,000	668,000	524,000	
55-59)	250,000	191,000	194,000	157,000	444,000	347,000	
60-64)							
65+	97,000	87,000	50,000	42,000	147,000	129,000	

Source: Taken from Table A-15, Employment and Unemployment Trends During 1977, Special Labor Force Report 212, U. S. Dept. of Labor.  
Total Labor Force during 1977 = 96,917,000 Ages 16-65+.

\*U - Unemployed JS = Job Seeker

be identified and that individuals can be assigned to a group in a logical and orderly fashion. The categorization system which forms our taxonomy is displayed as Figure 1 and will be referred to throughout the remainder of this chapter.

### Population

The population we will be concerned about in our taxonomy includes all persons aged 45 and older. As has been noted earlier, defining old on the bases of chronological age without taking into consideration several other factors is somewhat limiting. Our concern is eligibility of persons for assignment to work groups and the degree of their functioning ability within groups. Several factors when taken in combination suggest that age 45 is a logical lower limit at which to begin to group people for purposes of categorization within work groups and conditions of functioning. In this case, age per se is not a condition for membership within a group. However, an age designation is a convenient characteristic to use in order to simplify our discussion. Our underlying assumptions presented in Chapter 3 were predicated upon the belief that aging is a developmental process which all persons experience. The extent of the aging process a person experiences at any given time is based upon his/her ability to function as defined by several criteria. Age, then, becomes a convenient criterion by which we can examine within-group variation of a person's functional ability to perform different work tasks within work groups. Since we are concerned with a person's ability to participate in the work force, since full-time participation of workers in the work force begins to decline at

age 45 (Brennan, Taft, & Schupack, 1967), and since it has been estimated that by 1975 approximately one-half of the labor force was over 45 years of age (Britton, 1979), our designation of age 45 and above as the population of concern is both logical and reasonable. Defining the population in this manner does not assume in any way that because an individual is of a certain age they must belong to a specific work group, e.g., age 45 assumes one is able to work. Some individuals may be functionally "old" but chronologically young. The reverse may also be true.

"Work," as the term is being used here, includes all paid and unpaid activities which people engage in for whatever reason. Leisure activities are also included in this concept since for some people leisure means play; for others, the same play activity is work for which they are remunerated. The sense in which the term "work" is being used here is compatible with the detailed discussion on this topic presented by Kazanas, Baker, Miller, and Hannah (1973).

#### Age Groups

An examination of Figure 1 shows that we have utilized the rationale expressed above and divided the population aged 45 and older into units, grouped arbitrarily in five-year intervals. The purpose here is to be more precise in specifying the number of individuals by work groups and conditions within each age group and to have a more accurate description by age of which individuals "want and/or need" as well as which individuals have the ability to function as workers. The smaller age groupings are used to obtain more specific information on the population, which will be useful in making policy decisions

Condition of Functioning

Unable to work

Able to work

Want and/or need to  
work full time

Want and/or need to  
work part time

Want and/or need to do  
volunteer work

Want and/or need to engage  
in leisure activities only

Unable to work full time or  
part time and/or engage in or  
enjoy leisure activities

W  
o  
r  
k  
  
G  
r  
o  
u  
p

W	W	W	W	W	W	W	W
N	N	N	N	N	N	N	N
W	W	W	W	W	W	W	W
N	N	N	N	N	N	N	N
W	W	W	W	W	W	W	W
N	N	N	N	N	N	N	N

45-49

50-54

55-59

60-64

65-69

70-74

75+

Age Group

W = Want, N = Need.

Figure 1. Taxonomy of Aging and Work.

regarding programs and activities for the aged, allocation of financial resources for programs to aging persons, development of educational training and retraining programs which make full use of existing and future resources, and development of social service programs.

### Work Groups

We can now begin to identify those work groups to which all members of an aging population (45+) may be assigned. We will identify these as "Work Groups" since it was stated earlier that people gain their identity, sense of worth, life satisfactions, and develop positive self concepts through some form of work/leisure activity whether paid or unpaid (Kazanas, et al, 1973). These work groups are identified in Figure 1 as: 1) Want and/or need to work full time for financial remuneration, 2) Want and/or need to work part time for financial remuneration, 3) Want and/or need to engage in volunteer work activities, 4) Want and/or need to engage in leisure activities only, and 5) Unable to work full or part time and/or engage in or enjoy leisure activities.

The "want and/or need" conditions of Work Groups 1-4 could be based upon individual conditions of functioning as defined in Chapter 3. Thus, the 10 percent of the SEMPA group referred to earlier who were defined as economically impaired could conceivably be assigned to the "need" category of Work Group 1 and/or 2. Also, those individuals who gain psychological well being and/or life satisfactions from work, regardless of their economic status, could be assigned to the "want" category of the same work groups. By a similar reasoning, some

people might elect to "want" to engage in volunteer activities (Work Group 3) to satisfy their altruistic and/or psychological needs (assuming that they are economically in a position to engage in volunteer activities) whereas others would "need" to engage in activities for maintenance of mental well-being or see the need to seek experiences within the larger environment to fulfill life satisfactions. Assuming all other aspects of a person's life are satisfactory, some persons might "want" to engage only in leisure activities (Work Group 4) whereas others may "need" (i.e. for medical reasons, for instance) to engage in leisure activities only. Finally, some persons, usually defined as "frail," may be completely unable to work, or engage in leisure activities. Such persons would be assigned to Work Group 5.

#### Conditions of Functioning

The Work Groups, as generally defined in our taxonomy, are permissive in that individuals make the "want and/or need" designation based upon their own perceptions of their life conditions. However, the Conditions of Functioning under which one may participate in any of the Work Groups, especially in Work Groups 1 - 4, are influenced by whether or not they are "able" to participate. It may be that a person might "want or need" to be in a given work group but for medical, economic, or other reasons, they are unable to participate. Utilization of our definition presented in Chapter 3 will help to clarify this dimension.

### Implications

The Taxonomy of Aging and Work which has been outlined in this chapter presents a systematic way to identify and state numerous researchable questions concerning various groupings of older persons and the work conditions which may provide available work options for them. In the past, various work options have not been specified nor explicated in a way that allowed or encouraged meaningful choice by the individuals concerned. Neither were there clear cut evaluations of the effects of work programs, paid and/or unpaid, for differential groups of older persons. Heretofore, we have not had available a methodology which specified work options available to older persons, provided adequate evaluations of our effectiveness in meeting the needs of individuals within the options, or specified the numbers, identities and locations of the persons we are talking about. The list can go on. Utilization of this proposed taxonomy and the refinements which should emerge as a result of research should allow us to begin to find answers to these and other questions not yet articulated. Apparently, since questions concerning our older workers have not been previously articulated in the manner set forth. Census Bureau data and Department of Labor data do not provide the necessary information to answer the basic questions such as those listed above. At this point in time we are essentially left with theoretical questions and hypotheses concerning older persons as participants in the labor force regardless of the form or the environment in which their productivity takes place.



## CHAPTER 5

### AGING AND WORK: IMPLICATIONS

#### Introduction

A basic thesis which has been set forth in this monograph is that older persons are an important asset to the economy of the United States. They are a group of persons who continue to be underutilized as part of the labor force. Much of this underutilization may be attributable in part to the many myths which have been imposed upon older persons, especially the myth that older persons are unable to be productive and contributing members of the labor force (Butler, 1975; Nydegger, 1979). In the past, we have been content to encourage people who reach a certain age level to leave the labor force, ostensibly to retire from work and "enjoy life." Our increasingly affluent and technically sophisticated society has allowed us to develop a financial capability whereby individuals are encouraged to give up gainful employment at an earlier and earlier age. Further, when the post World War II babies began to enter the labor force the pressure of their entry was relieved through a reduction of workers at middle and upper levels of employment achieved by enforced retirement or inducements which made it very attractive for older individuals to retire. Instead of bringing about a smooth transition of younger workers into the place left by the retirees, this policy resulted in the elimination of an experienced and highly trained group of workers from the work force because the

younger workers were simply not experienced enough to fill the newly created vacancies. Should this policy continue for very much longer, by the year 2010 we can anticipate that the combined older and school age population, who are perceived as being "nonproductive" in terms of participation in the labor force, will exceed in number those individuals who work outside the home (Apker, 1979).

In the United States the attitude prevails that when individuals "pass their prime" as labor force contributors it is appropriate to remove them from the work environment, at least as full-time active participants, and to let a social welfare system minister to their needs. The problem is that the criteria by which this attitude is determined are not necessarily applicable to all individuals similarly. By the same token, we have been successful, through prolongation of formal educational experiences, in delaying the age at which new workers enter the labor force.

This concept of labor force reduction through retirement and withholding entry was first introduced in the United States officially during the 1930s. The country was experiencing a deep economic recession which was exacerbated through a massive reduction in the number of available jobs. There was need to create work (jobs) for heads of households. One way to accomplish this was to reduce the size of the available work force. This was accomplished through enforced retirement of those individuals at the upper age range who had been in the labor force for many years. Simultaneously, a number of individuals were denied entry to the labor force through defining them as too young. This made

sense at that time in history since that left a middle range of workers (perceived as most able and needy) to take the available jobs. More recently, the policy of enforced labor force removal through retirement would appear to be counterproductive to the economic health and stability of the United States for several reasons. Rapid inflation has eroded the purchasing power of the dollar, which in turn, adversely affects those retired persons on fixed income, creating pressure to increase social welfare services. There is a beginning realization that declining birth rates experienced during the 1960s will result in reduced numbers of available workers during the 1980s and on into the 1990s. Thus, the concept of elimination of our skilled workers from the labor force at an early age through early retirement (especially if they are physically and psychologically capable of being productive) may tend to reduce the efficiency of the productive potential of our future work force.

It would appear that within a very few years a serious shortage of highly skilled workers will occur in the United States. A factor contributing to this shortage is negative thinking about the productive potential of older workers (Sheppard & Rix, 1977). Currently, business and industry are showing signs of reassessing their past posture of easing out of the labor force, through early retirement, those employees who are experienced and knowledgeable, and who have a history of productivity and loyalty (Batten & French, 1978; Lermann, 1978). Finally, Apker (1979) and others have suggested that in 1940, approximately ten workers supported one retiree, whereas by 1995,

that ratios are expected to be approximately three to one or less. This raises serious questions about whether the current and future labor force is able and/or willing to withstand the increased costs associated with such small ratios. Due to increased costs associated with this type of behavior, it is questionable whether or not we as a society can afford to "throw away" our human resources through enforced retirement. Coupled with a decline in the fertility rate from a peak of 3.8 births per 1000 in 1957 to 1.8 births per 1000 in 1976 (Apker, 1979), the practice of only partially utilizing an experienced and productive labor force will lead to serious economic consequences, with fewer workers supporting a social welfare system.

Perhaps another and more subtle reason which may explain why we as a society continue to underutilize our older citizens as productive workers lies in the domain of theory. Until recent years the relatively small size of the older population, the point in time during which people were considered aged, and the high degree of economic affluence in the United States have tended to suppress the need for theoretical models around which the phenomenon of aging could be described, explained, predicted and understood. Regardless of the current need for immediate action and programs to help alleviate problems experienced by older citizens, decision makers have set forth policies which are predicated on theory, either explicit or implicit, although more often implicit. Gerontology, as well as other social and behavioral disciplines, has been continually aware of the need for good theoretical models. Most behavioral researchers realize the need to explain the phenomenon of observed behavior when working with others.

Through the definitional model presented in Chapter 3 and the taxonomy of aging and work presented in Chapter 4, we have attempted to address the theory issue as it relates to aging and work. Others (Butler, 1975; Maddox & Dellinger, 1978; Sheppard & Rix, 1977) have also set forth statements which suggest a movement toward developing a responsible theory of aging and work. Wirtz (1975) has implicitly suggested the need for movement in this direction. He calls human beings our "Boundless Resource" which has been relatively untapped because the structures for using them which were developed in the past have outlived their usefulness. Until recently we have functioned on the assumption that manpower was in unlimited supply. For reasons specified earlier, this assumption is now under question. There is a need to examine in new and creative ways the future potential, education, productivity, characteristics, and life conditions of older workers. We have attempted to set forth a basic model around which we can articulate, study, and refine human characteristics and life conditions as they relate to aging and work.

Throughout the remainder of the chapter we will examine our taxonomy of aging and work with regard to its implications for policy formulations in the areas of programs for the aged, retirement, mental health, education, and research. We will attempt to raise representative questions which need to be examined and explored. Such a broad view should act as a stimulus to researchers, theoreticians, policy formulators, and practitioners to re-examine their thinking and

actions regarding work as it relates to the aging process. It is expected that such a stimulus as proposed by our theoretical formulations will aid in the articulation of new and creative thought which in turn will help in confronting those issues and problems which will need to be addressed in the very near future.

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#### Policy on Aging

Ever since the 1971 White House Conference on Aging, an increased interest in and awareness of the plight of older Americans has developed. This awareness has generally focused on two major areas of concern: health and finances. From these two primary areas of concern have emerged federal, state, and local programs designed to aid differing groups of older persons with regard to nutritional programs, housing, transportation, safety, income maintenance, and more recently utilization of leisure time. Regardless of this overt expression of concern there still seems to be a deep-seated and perhaps unconscious prejudice against old people throughout our entire culture (Sheppard, 1979). Our basic thesis throughout our entire monograph has been the assumption that through work, either paid or unpaid, older people can reach a level of self-sufficiency which will help them be perceived throughout society in a more positive way -- as contributing and productive members of society, and as full, complete, and economically independent. In order for this condition to happen, new and creative styles for the utilization of this reservoir of human resources will need to be conceptualized and implemented.

A commitment toward long-term policy planning will need to be made prior to any change and prior to any further legislation being enacted. Such a commitment should include:

1. A basic and committed belief that all persons regardless of age can continue to be productive members of the labor force should they be physically and/or psychologically able and willing to participate.
2. A belief in the heterogeneous nature of the older population and commitment to making available options to participate in paid and/or unpaid activities in the labor force that reflects this heterogeneity.
3. A recognition that older persons can and do function differently, regardless of age, as indicated by our functional developmental aging definition presented in Chapter 3.
4. A recognition that in order to understand the differential participatory nature of older persons in the labor force there needs to be an ongoing program of basic research, following a model similar to the one presented in Chapter 4, which allows for a high degree of specificity regarding description, explanation, and prediction concerning the group of persons under consideration.

#### Retirement

Has the concept of retirement as currently practiced in the United States outlived its usefulness as a social system? Retirement from active participation in the labor force is a social action which has grown out of industrialization. In agrarian societies as well as more traditional cultures, age is accompanied by increasing prestige and expressions of need. Industrialization has reversed this attitude to the point where youth has been idolized, at least in the recent past, and being old is something which happens to others. It is with increasing realization and consternation that we ourselves are those

others. Our labor customs urge older persons to absent themselves from the labor force at specified ages; then our social systems reject them from continued participation in the socialization activities which grow out of employee interactions. Retirement, then, is the act of leaving or giving up a particular life style, but apparently little or no effort is expended in considering where to go after leaving.

Current pre-retirement planning programs usually address topics associated with financial entitlements available upon retirement. These programs are offered primarily for those persons who are at or near retirement. Little attention is devoted to planning for the future. One of the reasons for this lack of future orientation to retirement is related to the paucity of systematic data associated with what happens to those persons who leave the labor force. Frequently two views are expressed: what it is like to live in a retirement community and/or what nursing home living is like. Very little thought is given to the individual living in his/her own home or with family. There is almost no expression of productive and constructive use of one's time when leaving active participation in the labor force with the exception of what some would call "make do" activities such as crafts, gardening, and the like. It is here that our proposed taxonomy can contribute to systematic inquiry, information gathering, and data organization which would then allow for more accurate statements concerning the phenomenon of aging and suggest more thoughtful approaches toward retirement. Knowing what



happens to retirees, who they are, what specifically are their needs, and the like would assist us to address questions of concern in more precise and systematic ways. Some representative questions are:

1. What programs of social service to older retirees are needed which are not currently available? For how many persons, under what conditions, at what point in time, etc.
2. What is the impact of the new Age Discrimination in Employment Act, 1978 Amendments on retirement practices of older workers? How many people are affected? Who are they? What types of work were/are they engaged in? Should the age 70 ceiling be lifted? If so, how many persons would be affected?
3. Are our current social security laws punitive and inhibit the desire of older persons to work under threat of loss of financial security? Should there be revisions in the law such that people are rewarded for continued productivity and independence while under social security support? Again, how many persons would be affected? Who are they? What alternatives are available to individuals who need additional financial support but fear loss of dignity?

#### Mental Health

Much has been written concerning the mental health problems which seem to affect old people. Visualizations as expressed through the popular media of television, magazines, newspapers, and the like frequently depict aging persons in distressful psychological and physical situations. While it is true, aging persons do suffer from mental dysfunctional problems, it does not necessarily follow that these dysfunctions are the result of an aging process nor are they the only age group to suffer from these problems. Some gerontologists would have us believe that the mental problems experienced by an aging population are normal and follow a developmental sequence associated

with physical deterioration and age (Toward a National Policy on Aging, Vol. II, 1971). What a dismal future to look forward to. The psychopathologies associated with aging are often coupled with normal physiological deterioration (Butler, 1970, 1975). By connotation, to be old is to be physically disabled and mentally incompetent. This is how old people are often perceived (Butler, 1975). Perhaps this is one reason why, with this pessimistic view of aging being a major social focus, our society has revered being young. The idolization of youth by our adult population could be perceived as resistance to and rejection of growing old. Perhaps, also, adults tend to resist the phenomenon of aging and all the attending problems because of the relatively recent increase in numbers of old people which has made the problems of aging so visible and for some so painful.

It was suggested in our discussion, presented in Chapter 2, that mentally healthy individuals perceive themselves as being persons of worth and value in society and that these feelings are generally associated with satisfactions experienced as participants in the work force. Further, older persons are resisting being "put out to pasture" and are expressing a desire to be re-integrated into society through paid or unpaid employment. The desire for continued active participation in the labor force seems to be associated with an increasing longevity. This longevity is the result of significant recent advances in medical technology as well as the improved health practices and nutritional programs currently available. The less

rigorous physical demands from the work setting due to improved industrial technology seem to have facilitated increased vigor and health in older people and provided leisure time unparalleled in history. One must question if the attitudes and actions toward the future as expressed by some older persons are really manifestations of psychopathology or expressions of positive mental health.

An examination of the psychological well being of older persons needs to be undertaken in relation to improved physical health, perceptions of self worth, being needed, and contributions to society gained through some form of paid and/or unpaid work.

Our taxonomy along with data presented from the SEMPA program (Maddox & Dellinger, 1978) suggest that the relative numbers of mentally dysfunctional older persons are small. Butler (1975) has presented data indicating that as people age, incidences of mental illness rise. However, he questions the accuracy of these data due to poor and inadequate diagnostic procedures used to define mental illness in older persons as well as the "agism" practiced by psychiatrists, social workers, and mental health specialists who work with old people. If, as has been suggested frequently throughout this monograph, people gain their identities, sense of self worth, and experience many of their life satisfactions through work, is this any less true for older persons whom we have attempted to set aside? Some of the pertinent questions as they relate to mental health and our taxonomy can be expressed as follows:

1. What effect will continued participation in the labor force have on reducing the incidences of mental dysfunctions

experienced by older persons? Who are they, from what work groups (see our taxonomy), what occupational groupings?

2. Do older persons want and/or need to work in order to maintain an important place in society? Will working, paid and/or unpaid, become a therapeutic tool which is little understood currently by mental health practitioners who work with older persons?
3. If work for older persons is demonstrated to be therapeutic in reducing the incidence of psychopathology, to what degree and for whom can we reduce demands for mental health services currently in place, thus reducing medical costs?

#### Education

The mystique of education and the rewards education provides have been and continue to be a basic value, a belief, and a way of life in American society. Deutermann (1974) reported that in 1940 the mean educational attainment for males (16 to 64) was 8.6 years and for women 9.8 years. By 1973 these figures for the same age range were 12.0 years for males and 12.1 years for females, thus demonstrating increased educational attainment and a continued belief in the value of education. The rise during recent years in educational savings plans, insurance programs for educational assurances for the young, and other forms of investment programs to assure a financial capability to attain anticipated educational achievement levels coupled with such federal programs as Basic Educational Opportunity Grants (BEOG), increased public and private scholarship funds, subsidized educational loan programs, and the like are expressed manifestations of the reverence Americans have for education. While planning for future education by adults for their children most often implies a four year collegiate experience, it is

not so limited. One merely needs to review the phenomenal enrollment increases of the past two decades in public and private junior and community college programs as well as the increasingly successful private proprietary schools, to witness this fundamental belief that educational attainment is basic for future opportunities.

Corresponding to the rise in education for youth has been the rise in educational opportunities and options for adults. Adult basic education, special adult classes for personal development learning, life long learning concepts, and the like reflect a recent upsurge of interest with and activity in adult education. However, as was noted in Chapter 2, adults who are taking advantage of available education and reeducation programs are generally in the young adult category, age 16 to 30. Older adults are not flocking to these programs. Several reasons for this apparent lack of participation by older adults were speculated about earlier: courses offered at a poor time, restrictive entrance requirements, and so forth. It may be that older persons themselves believe the myths about aging especially as they relate to learning. Learning in recent years has taken on a pragmatic connotation -- if one expends a certain amount of psychic energy and financial resources then this should translate into an improved position in the work force and result in economic gain. Older adults who believe in this logic may see education as a luxury they cannot or do not want to afford. The concept of learning for the purpose of enrichment and personal development seems to have lost some status, perhaps due to increased educational costs or the need for people to see a tangible

return on their self investment. Regardless, most older persons are not taking advantage of available educational opportunities to the extent anticipated by proponents of life long learning.

In the more pragmatic domain, most older adults have been reared in a society whose life style followed a "linearity of life" concept -- education for youth, work for adults, retirement for the old -- which we referred to earlier. The multiple options for life long work and learning described by Kurland (1978) were not readily available for those individuals currently perceived as old or individuals newly entering that life stage. What most people often forget is that learning takes place, to a greater extent than realized, in non-formal and/or non-structured environments. How to implement a multiple style learning concept and make it a real option for people in later life becomes a very real national problem which has yet to be fully addressed by educators.

Another aspect of the adult learning boom has to do with demands on workers to up-grade continually their skills and knowledges in order to keep pace with the technological changes taking place in business and industry. Most employers tend to encourage the younger elements of their work force to take advantage of educational opportunities under the assumption that an investment in education (be it time or money or both) will produce a longer period of potential productivity from their employees. Economically, this is seen to be a sound business practice. However, with the changes in mandatory retirement and a rapid movement toward information and service based industries rather

than product based industries which require strenuous physical output, this attitude toward education and reeducation for young adults only may need reassessment to include all adult age groups (Snyder, 1979).

With the emerging learning/work styles described by Kurland (1978), it is reasonable to assume a greater mobility in the labor force with the corresponding emergence of multiple work styles and patterns. It is speculated that there will be a greater need for a pool of skilled and knowledgeable workers who are amenable to change and short term job specific retraining as these changes emerge. It would seem more reasonable to assume that older persons are prime candidates for these short term job specific retraining programs assuming educators as well as employers and older people themselves can get over the myth that older persons cannot learn. What we do know is that older people can learn new ways of behaving, new skills, new knowledge, but they learn in a mode different from that which educators are trained to deliver (Webber, 1978).

Currently, vocational education programs and programs supported under the Comprehensive Education and Training Act (CETA) come closest to having the resources, skills, and available teaching technology to offer the kinds of retraining programs which would assist older workers to continue as productive and contributing members of the work force. However, it is questionable that the proponents of these programs are mentally attuned to the notion of providing such programs using their existing resources. CETA is designed to assist in the training and retraining of disadvantaged unemployed. Certainly, the vast majority

of old people meet these criteria. Vocational education originally was designed to provide technical education at the secondary school level for prospective new job entrants. Vocational education is now also engaged in post-secondary vocational training activities, but still essentially focuses its resources on the first time job entrant or the young job entrant who has left the formal educational environment and has returned for specific job training. It would seem that it is at the post secondary level of vocational education's operations that educational programs could be designed to include older workers who desire to stay in or reenter the labor force.

Community and senior colleges as well as other educational establishments will need to begin to rethink their educational missions with regard to the place of older learners. Given our taxonomy presented in Chapter 4, those older persons who want and/or need to work under the auspices of one of the defined work groups will, in all probability; need to be retrained in-order to participate actively in the labor force. Are our multiple and diverse educational systems geared up to help? I think not. Our current educational systems are still designed to accommodate the "linearity of life" concept and have not begun to gear up for the multiple living, learning, and working styles being demanded, advocated, and implemented by citizens of all ages.

Numerous work options such as split shift, flex time, shared jobs, job rotation and the like are being tried. Most of these new work structures are ideal for utilization of old people as workers in



the labor force. These people have the time, the hours are right for them, and they are willing to be active participants. In fact, many older workers are already in the labor force (see Table 1 and 2 for these summary data), some surreptitiously. What we don't know is how many are full time, part time, or volunteer. Who are they, what work do they do, for whom? Utilization of our taxonomy would allow for systematic organization and gathering of these data, interpreting the results in order to suggest appropriate education programs to meet the different needs of this potentially vast and untapped labor supply.

### Research

The potential for research in the area of aging and work is a rich domain for exploration. A description listing our lack of knowledge related to aging and work would probably be greater than our knowledge. One can begin at almost any point to raise important and pertinent questions which would have implications for policy formulation, program development, practical application, and future research. There have been a whole host of researchable questions raised throughout this monograph which suggest many different research dimensions. To reiterate them at this point would be redundant. The verification of the functional developmental definition of aging presented in Chapter 3 and the taxonomy of aging and work presented in Chapter 4 are in and of themselves important and extensive in terms of the knowledge base they would contribute.

Based upon the explicit assumptions presented in Chapters 3 and 4

and the implied assumptions indicated throughout this monograph, we assert that it is appropriate to call for two dimensions of research related to aging and work. These research domains can be labeled as "basic" and "applied." We are advocating that a program of basic research concerned with theory building is necessary in order to propose policy, programs, and practices which can be evaluated both in terms of cost effectiveness and utility. Basic research would provide us with primary information about those persons whom society perceives as "old." It would build support for basic assumptions about the nature of age and tell us what individuals comprise the population called "old." Current information and knowledge about older persons in our society suggest huge deficits which have been essentially filled by myths, pseudo inferences, hunches, and emotionalism. It is very difficult to plan effective long-term policy with regard to aging at any governmental level on such flimsy and unsubstantiated evidence. We do have some demographic data, but these data fall short in terms of specific descriptive characteristics since they assume homogeneity of the group under consideration. Time and again responsible writers who are addressing the issues of aging have pointed out the heterogeneity of this group; yet policy planners and deliverers of services insist on assuming that all old people are alike. How can we continue in this manner when we have yet to define accurately who is "old?"

When is a person old? How do we recognize this condition? These seem to be very basic and fundamental questions which have never been adequately answered. Social custom, not research, has arbitrarily made

the distinctions. The functional developmental aging definition, which needs to be tested and verified, could identify those parameters which collectively could define what we mean by "old." Can such people function productively as active participants in the labor force? Our taxonomy assumes they can, but due to the individual differences in the aging process, our taxonomy also assumes that different individuals under different conditions are productive at varying times and ages. How valid are these assumptions? A program of basic research could be designed to support and/or refute these assumptions. It would seem that if American society has a desire to reverse its attitude toward its older citizens, basic and fundamental questions need to be resolved. A program of basic research which is longitudinal in scope would greatly assist in obliterating aging myths and begin to change attitudes concerning the aging process and the aging person's value to self and society.

A corresponding program of applied research is also necessary. Real people have real problems and need help now. But because of immediate need we should not be deterred from asking basic questions having to do with quality and effectiveness of services and service delivery systems. What kinds of self help programs are operating, for whom, and how many persons are affected? If old people work, where do they work, for whom, for how long, and under what conditions? Why do they work? How are other facets of their lives affected by their employment? Are these second careers, or extensions of primary careers? The list can go on and on. However, answers to these and

other questions form the bases for program action, and policy development predicated upon knowledge rather than myth and/or emotion. Data resulting from answers to these questions would be helpful in finding a resolution to some of the more theoretical and basic questions raised earlier.

What we have attempted to articulate in this last section is that more data derived from systematic research is needed if we truly mean to seek solutions to problems and concerns being confronted by an ever increasing aging population.

#### Concluding Comment

It was not the intent of this monograph to suggest that work was the therapeutic medium to solve the problems society is facing now and will face in the future with regard to our aging population. What was intended and perhaps overstated at times, was that work and its relationship to aging is an important domain but one which is little understood or explored. There are apparently no available guides to suggest what path to follow or what agencies or groups should take the lead. It is proposed that research involving our proposed functional definition and work taxonomy is one path. Its intent is to help clarify through description, analysis, and identification a strategy whereby some of our older citizens can continue to participate as full and autonomous partners in our society. An acceptable avenue for reentry to this participation is through work, either paid and/or unpaid.

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