

AN ABSTRACT OF THE THESIS OF

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Title: HOME MANAGERIAL TASKS, PERCEIVED COMPETENCE,  
AND RELATED SOCIAL, PSYCHOLOGICAL, AND ECONOMIC  
CONSEQUENCES FOR RETIRED COUPLES

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This study was designed to identify and describe home management tasks, perceived managerial competency, and related social, psychological, and economic consequences for a sample of retired couples.

Managerial tasks were defined as essential, periodic activities which (1) sustain the living patterns of a person or family in a common household, and (2) adaptive responses to problems and opportunities produced by changing human or material resources, environmental situations, or health conditions.

Management tasks were studied in eight functional areas: food, clothing, secondary living space, household maintenance, marital and family relations, financial resources, social-community relations, and health.

Managerial tasks were also classified into four types on the basis of complexity, content, social units involved, and management processes required. The classification included routine managerial, complex managerial, transactional, and interpersonal tasks.

Managerial competence was defined as the ability to identify, obtain, and utilize human and material resources to accomplish tasks and achieve goals. Twenty-five items were prepared to measure perceived managerial competence. Items were prepared on the following components of management: underlying factors; collecting and analyzing information; planning and decision making; assessing human resources and interpersonal skills; implementing and coordinating; and evaluating, adapting, and redirecting.

The 102 urban couples interviewed had lived an average of 70 years, had completed high school, had an annual median income of \$5,200 a year, and a median net worth of \$36,400. Nine out of ten lived in their own homes. The husbands had been retired an average of five years. Home managerial and related activities were important to eight of ten men and women after retirement since the potential loss of these activities was viewed very negatively.

Women did significantly more of the managerial tasks in the areas of food, clothing, house cleaning, and marital-family relations. (Significance statements refer to the .05 level). Men did more of the tasks in secondary living areas and in finances.

Husbands and wives shared equally in the managerial tasks of health maintenance and social-community relations. Retirement of husbands from their major occupations resulted in significantly greater involvement in 17 of the 63 managerial tasks studied, and a complementary decrease by their wives. However, the basic pattern in the distribution of tasks before and after retirement was one of stability.

There was a relatively equal sharing of tasks between husbands and wives and a similar assumption of leadership in household and family affairs, 54 percent of the tasks and leadership being attributed to wives. Ninety-five percent of the respondents said they had reached a workable division of responsibilities and sharing of activities. The post retirement patterns required fewer than six months to establish and were considered to be stable and satisfactory by nine of ten respondents. Husbands and wives did not increase their involvement in tasks related to maintaining the marital relationship, nor did wives increase interpersonal activities to help their husbands adjust to retirement.

One of ten wives reported her husband's retirement as a major adjustment problem. Increased involvement of men in home managerial tasks was associated negatively with ratings on quality of task performance.

There were no significant differences between men and women on their managerial competence scores. Respondents who perceived

themselves as competent home managers reinforced this judgment with high ratings on the performance of tasks in the eight functional areas. Those with the highest managerial competence scores had made the most extensive preparations for retirement.

Other social, psychological, and economic factors positively related to perceived managerial competence included self image, satisfaction, income, and net worth.

Fifteen couples were also interviewed from a rural village for comparison with the urban sample.

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by

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# HOME MANAGERIAL TASKS, PERCEIVED COMPETENCE, AND RELATED SOCIAL, PSYCHOLOGICAL, AND ECONOMIC CONSEQUENCES FOR RETIRED COUPLES

## CHAPTER I

### STATEMENT OF PROBLEM

In the United States in 1960 there were 5.3 million husband and wife families in which the husband was age 65 or over. At that time there were 17.3 million people over age 65 in the United States (Tibbitts, 1965). Married couples living together represented a majority of 10.6 million of those age 65 and over in our society.

This dominant pattern of married couple families among the aged is a relatively new phenomenon, emerging in the 20th century. Data that Glick (1957) reported about the American family in 1890 indicate that the average couple could not anticipate and would not experience any time together after the last child left home. The husband was likely to die about two years prior to the last child's departure. Consequently widowhood intervened and overlapped the launching period.

Glick reported that by 1950 the expectation for the average couple was radically different from that of couples at the turn of the century. A new stage in the family life cycle was established with

the older couple living together for an average of 13.7 years after the launching period (Glick, 1957). Duvall (1957) divided the family life cycle into eight stages including the beginning family, child-bearing family, family with preschool children, family with school children, family with teenagers, family as launching centers, family in the middle years, and the aging family.

Research on managerial activities of older couples belongs in the study of the family and home management throughout the life cycle. Gross and Crandall (1963) described the concept of the life cycle. They pointed out that even though individual families differ from each other, they encounter common problems and go through similar stages in their life history.

The importance of recognizing the life cycle of the family lies in the opportunity it affords families to look ahead and to foresee the family needs and wants which may be expected to occur during each stage. It is also valuable for prediction of the flow of resources a family may logically expect at the various stages (Gross and Crandall, 1963, p. 150).

Some of the major variables in the different stages of the life cycle include: size of family, age of family members, amount of income and expenditures, occupation of family provider, place of residence, condition of health of family members, and the time and energy demands on the homemaker. Gross and Crandall (1963) suggest that a period of financial recovery for the couple follows after the children leave home. During the recovery period, earlier



debts are paid off and retirement savings are increased. Financial security, however, may be threatened by sharply reduced income in retirement. Gross and Crandall (1963) further report that:

It is the last substage of the contracting family which requires the greatest adjustment on the part of family members. Since the number of aged is increasing, and since life expectancy is also increasing, today's problems can be expected to become more rather than less intense (Gross and Crandall, 1963, p. 177-178).

Work, income, time, and living arrangements form the basis of Gross and Crandall's (1963) discussion of home management in retirement. The transition from work to retirement, they point out, is more difficult for employed men and women than for the full time homemaker, although she, too, faces a reorientation. Problems of aging and retirement that Gross and Crandall (1963) covered include compulsory retirement, reduced income, engagement in purposive activities, changes in living arrangements, uses of time, services in institutional settings, and retirement communities. They state that:

The major problem for many families at this stage is the amount of income available in relation to needs and wants. . . . Thus they have to adjust to eliminating or reducing many expenditures which in the past they have taken for granted (Gross and Crandall, 1963, p. 183).

The ability of retired couples to manage their money well facilitates the acquisition of essential goods and services. The ability to manage also facilitates their adaption to reduced

resources. Tibbitts (1965) stated that:

One of the most critical problems of old age is maintaining financial security. The financial position of the majority of older people can be described only as poor and that of sizable proportions as catastrophic. Some 2, 000, 000 women and 200, 000 men had no income at all (Tibbitts, 1965, p. 5).

During the pre-retirement period, the husband may anticipate the implications of retirement for a reduced income and the changes in his role as worker. He may recognize that opportunities for participation in home management activities increase upon retirement. Role change for the husband will be accompanied by related changes for the wife. Changes may be expected not only in the division of work, but also in attitudes and morale. Some couples may be more satisfied because of an upsurge of common interests. However, retirement from work is a shock for some men. They experience a period of crisis and disorganization and sometimes die early. Some corporations with a fixed retirement age have reported that certain retirees fail to reorient themselves, decline in health, and die seemingly ahead of schedule (Cabot, 1961).

Studies by Cavan (1949), Shanas (1950), Havighurst and Albrecht (1953), Burgess (1954), and Scott (1955), demonstrate that higher levels of personal and social adjustment, morale, happiness, and satisfaction are positively associated with higher levels of social participation. Negative self conceptions, inadequate role

opportunities, sudden or marked role changes, poor health, low income, and reduced interaction are negatively associated with adjustment (Hansen, 1960).

Although many married women are employed or spend time outside the home in community service or recreation, the full time homemaker spends much of her energy and time on household and family responsibilities. At the beginning of the older couple stage, when the children have gone, the woman may rely more heavily on the marital relationship than before for companionship. This change may carry through and become even more evident in retirement. On the basis of his review of research on retirement, Smith (1965) hypothesizes that:

The greater involvement of husbands, after their retirement, in homemaking and domestic activities is associated with a growth in companionship and compatibility with the wife (Smith, 1965, p. 151).

In summary, the majority of people age 65 and over in the U. S. are married couples. The post retirement years constitute the final stage in the family life cycle. This stage has some special problems and opportunities with regard to financial resources, time utilization, health, housing, roles, and morale. These problems are expected to affect home management practices of retired couples. Managerial competence is considered to be important in adapting to or resolving these problems. This investigation has been designed

to accomplish the following objectives:

- a. to identify and describe the major managerial tasks in retirement that are associated with finances, housing, yard work, food, clothing, health, family relations, and the community;
- b. to develop a set of questions which serves as one measure of perceived managerial competence in home and family affairs during retirement;
- c. to determine the extent of change and stability in patterns of home and family management in retirement;
- d. to analyze the division and sharing of home managerial responsibilities between husbands and wives during retirement; and
- e. to compare selected differences on the managerial tasks and perceived competence with self-evaluations and with demographic data.

### Rationale of the Study

Participation in more household and family activities may be a realistic alternative to employment for men during the early retirement period. Home and family concerns may become a central focus in retirement and provide a variety of rewarding tasks. Responsibilities at home and family activities may help explain

the absence of a massive agitation by retired people for new roles in the community. If responsibilities at home facilitate adjustment and provide satisfaction, they could be incorporated into societal expectations for retirement. More social recognition may be appropriate for home management practices and skills which help older people live independently. The alternatives of institutionalization, comprehensive medical-nursing care, and welfare services to dependent persons are costly to individuals and the public.

Managerial activities within the home and family during retirement need to be studied for several reasons. Because of the additional time available to the husband, the couple has an opportunity to establish a new division of responsibilities. Husbands need new tasks and relationships to compensate for loss of work and associations established on the job. Tasks in retirement may also be identified for future comparisons with tasks in middle aged and young adult families. Decreased income and changes in housing may require additional managerial effort.

From previous interviews with older people this investigator has found that the ability to live at home and take care of oneself, rather than to become institutionalized or chronically dependent, is an important goal in retirement. Beyer (1958) reported that seven of ten persons age 65 and over lived in their households. Home care services provided by Medicare have enabled most of the chronically

ill and disabled to live at home.

This study will help to answer the following questions about retired couples living in their own homes. How does the allocation of tasks change after the husband's retirement? Do perceptions of managerial competence vary for different age groups after retirement? Is perceived managerial competence related to satisfaction and financial resources in old age?

### Conceptual Framework and Hypotheses

Human development theory and research have been applied most extensively to the periods of childhood and adolescence. Concern with physical growth and maturation, may have limited the study of other aspects of development during adulthood. Decremental physical changes associated with aging are more obvious than psycho-social changes. However, added leisure and longevity increase the importance of exploring the potentials for social development throughout the entire life cycle. In retirement, these potentials include such things as companionship, community service, hobbies and recreation, wisdom, and judgment.

The stages of adulthood were considered by Duvall (1957) in her work on family development. She outlined developmental tasks for young adults, middle aged, and older people. Duvall's formulations were based on an earlier investigation of the developmental

task by Havighurst in 1953.

A developmental task is a task which arises at or about a certain period in the life of an individual, successful achievement of which leads to his happiness and to success with later tasks, while failure leads to unhappiness in the individual, disapproval by the society, and difficulty with later tasks (Duvall, 1957, p. 98).

Human development was viewed as continuing throughout the life cycle. Each stage of the life cycle was characterized by certain changes, problems, and developmental tasks.

A concept of "managerial task" has been formulated for this thesis. Managerial tasks are defined by this investigator as essential, periodic activities which sustain the living patterns of a person or family in a common household, and/or adaptive responses to problems and opportunities produced by changing human or material resources, environmental situations, or health conditions. Accomplishing a managerial task results in human maintenance and supports the pattern of living. Managerial tasks differ from developmental tasks because they focus more on the physical aspects of maintaining a home, and providing services to individuals within the family.

The following concepts are used throughout the thesis. The definitions are placed here for the reader's convenience.

## Definition of Terms

Anomia is an individual's generalized, pervasive sense of relatedness to others. Measurement is based on a continuum with belonging at one end and social distance and alienation at the other end (Mizruchi, 1960).

Dominance in task accomplishment is established quantitatively when either husbands or wives do at least 60 percent of the tasks not assigned to others.

Facilitating mechanisms are those attitudes or practices assisting the individual to implement the managerial function.

Functional area designates a group of managerial tasks inter-related because of a common focus. Each functional area is a major division within a system.

Managerial function refers to a broad strategy for the use of resources which facilitates adaptation and increases the probability of goal achievement for the individual and family.

Managerial tasks are essential, periodic activities which sustain the living patterns of a person or family in a common household, and/or adaptive responses to problems and opportunities produced by changing human or material resources, environmental situations, or health conditions.

Perceived managerial competence is one's perception of his ability to identify, obtain, and use human and material resources to complete tasks and achieve goals.

Quality of task performance is a subjective evaluation by respondents of how well household tasks were accomplished in each functional area.

Secondary living space, as used here, complements the core living area which included the kitchen-dining area, family and/or living room, bedroom(s) and bathroom(s). The garage, tool shed, storage room, basement, yard, and patio are examples of secondary living space in this study. Secondary space is generally not occupied per se and it may not be frequented daily. These spaces may vary according to the family, the geographic region, or the climate.



Self concept is a person's view of himself on factors such as appearance, age, confidence, problem solving ability, and health.

Self image is the totality of self conceptions.

System is a group of related activities which are patterned, and have identifiable boundaries.

In this study, managerial tasks are placed within a framework of systems and functional areas. The author assumes that the energy, knowledge, skill, and time of the retired individual may be applied in four major systems: home managerial, psychosocial, creative and cultural, and voluntary service. This study is limited to an examination of the home managerial and psychosocial systems. These systems are viewed as alternatives to gainful employment in which the individual may redirect his energy, knowledge, skill, and time.

### Functional Areas of Home Management

Food, clothing, financial resources, health, household maintenance, secondary living space, marital and family relations, and social-community relations are all functional areas of the home managerial and psychosocial systems. A functional area is composed of a group of inter-related managerial tasks with a common focus. Managerial tasks are specified in each functional area.

The functional area of food includes planning meals, buying, storing, cooking, and serving the food; setting the table, washing

dishes, and disposing of waste.

The functional area of clothing includes the tasks of purchasing, washing, drying, dry cleaning, ironing, folding, and storing clothes and linens.

The managerial tasks in the yard, garden, and secondary living areas include maintaining the lawn, flowers, shrubs, garden, and orchard. Cleaning the garage, basement, tool shed, and other outdoor service areas is also included. Handling and storing screens and lawn furniture are additional tasks in this functional area. Tasks of purchasing, driving, and servicing the car are also included.

The functional area of household maintenance involves the managerial tasks of cleaning the house, painting, making repairs, and caring for indoor plants, and for pets.

The marital and family relations area includes tasks of assuming leadership in household and family affairs, and planning special family events. Tasks of visiting, telephoning, or writing children and grandchildren are included in this area. Showing concern for the problems of one's spouse, and expressing respect, appreciation, and love for him or her are also part of the area of marital and family relations.

Study of governmental programs affecting couples, study and decisions about property, the estate, insurance policies, and stocks

and bonds; maintaining records of income and expenses, figuring taxes and budgets, paying bills, cashing and depositing checks, and earning money, or making goods of economic value are all managerial tasks in the financial area.

The functional area of health involves the tasks of directing exercise, physical examinations, medications, safety, personal care of a sick or disabled family member, as well as the doing of more housework in times of illness or disability, the obtaining of medical and dental care, and the deciding on appropriate health care facilities.

The social-community area includes the tasks of visiting, entertaining, voting, doing volunteer work, attending church, participating in hobbies, intellectual activities, and recreation. (See the interview schedule in Appendix A for specific items, p. 169).

### Types of Managerial Tasks

Managerial tasks have been further classified into four types based on a subjective determination of the nature of each task. The types include routine managerial, complex managerial, transactional, and interpersonal. (See Appendix D, p. 193 for a listing of tasks of each type).

Routine managerial tasks are those tasks exhibiting characteristics of one or more of the following: performance in a single

operation; establishment of a relatively fixed pattern, followed routinely; or emphasis on physical labor, maintenance activities, or the use of appliances. (Examples would include dishwasher, washing machine, and clothes dryer.)

Complex managerial tasks are those in which alternative choices are available that require planning or making decisions; the task involves a sequence of related activities which differ in complexity; technical skill is required beyond physical labor; and an element of special study, supervision, or service is required.

Transactional tasks are similar to complex managerial tasks, with the additional characteristic of linking the family as consumer or client with other units of the community providing goods or services.

Interpersonal tasks are defined as those having particular social and/or psychological consequences in maintaining marital, family, or social relationships.

The redirection of energy, knowledge, skill, and time is viewed as a major managerial function in retirement and old age. Resource management is considered to be the mechanism which facilitates redirection.

Major concepts in the theory of home management in retirement developed for this investigation follow:

### Aging Families (Period of Retirement to Death)

Systems . . . . .	Home managerial* Psychosocial
Functional Areas of Management . . . . .	Food, clothing, financial re- sources, health, household main- tenance, secondary living space, marital and family relations, and social-community relations
Managerial Tasks . . . . .	Routine, complex, transactional, and interpersonal
Major Managerial Function in Retirement . . . . .	Redirection of energy, knowledge, skill, and time
Facilitating Mechanism . . . . .	Resource management
Outcomes of Achieving the Managerial Function . . . . .	Acceptance of and successful adaptation to aging and retirement
Emotional Consequences Relating to Achievement of Managerial Function . . . . .	Feelings of security and satis- faction
Self Image . . . . .	Totality of self conceptions

\*This study is limited primarily to the home managerial and psychosocial systems. The creative-cultural and voluntary service systems should also be investigated as areas in which more older people may utilize their knowledge, skill, energy, and time.

Examples of Managerial Tasks Within the Systems,  
the Types, and Functional Areas\*

Systems:	I	Home managerial	II	Psychosocial
Functional Areas:	A	Food	A	Marital and family relations
	B	Financial resources		
	C	Health	B	Social-community
	D	Clothing		
	E	Household maintenance		
	F	Secondary living space and related activities		
Classification of Types:	a	Routine managerial	d	Interpersonal
	b	Complex managerial		
	c	Transactional		
Managerial Tasks:	IAa	Setting and clearing dishes from the table	IIAd	Showing concern for and listening to companion's problems
	IBb	Figuring annual state and federal income taxes		
	ICc	Obtaining medical and dental care as needed	IIBd	Visiting with neighbors and friends
	IDa	Folding and storing clothes and linens		
	IEb	Repair of house, furniture, and appliances		
	IFc	Obtaining maintenance, services, and repairs for the car		

\*The outline above begins with "systems," which are the broadest concept in this theory about home management in retirement. The outline is concluded with examples of tasks. Functional areas, located at the second conceptual level, constitute the major divisions of a system. The third level of abstraction in the outline is the classification of types, which refers to the purposes, complexities, requirements, and outcomes of managerial tasks. Finally, specific managerial tasks are stated and placed by type, functional area, and system. For example, managerial task ICc is transactional, belonging in the health area, and to the home managerial system.

### Perceived Managerial Competence

Managerial competence, as the term is used in this study, is the ability to identify, obtain, and utilize human and material resources to accomplish tasks and achieve goals. Six components were identified as the major divisions for the measurement of competence in home management. Each component contained at least three but no more than seven items. Component A deals with some of the underlying determinant factors for management decisions including values, standards, and priorities. Component B is based on the processes of collecting and analyzing information. Component C includes planning and decision making activities. Component D focuses on the respondent's capability to assess and utilize human resources and to be supportive to others in the household. Component E consists of items which involve decision implementation and co-ordination of resources and activities to accomplish goals. Component F is based on the evaluation, modification, and redirection of management decisions and actions. (See Appendix E, p. 198 for the listing of individual items in each component. )

### Dependent and Independent Variables

The first major dependent variable examined in this investigation is the distribution of managerial tasks before and after

retirement. Personal perceptions of managerial competence held by husbands and wives are the second dependent variable.

The independent variables included:

sex	chronic illnesses and disabilities
age	occupational rating
education	length of retirement
income	amount of employment
satisfaction	performance evaluations
self image	retirement preparation
years married	rural-urban community
anomia	

### Hypotheses to be Tested

1. Home managerial and family activities after retirement will be viewed as very important, and perceived alternatives to these activities will be very limited.
2. The husband's retirement from gainful employment will result in increased involvement in the managerial tasks at home and in family affairs.
3. The husband's increased involvement at home will be accompanied by a complementary pattern of decreased involvement by the wife.
4. Husbands and wives will increase their involvement in the interpersonal tasks related to maintaining or strengthening the marital relationship.
5. Wives will respond to their husbands' retirement by



increasing supportive activities which facilitate his adjustments.

6. Despite changes in who accomplishes selected managerial tasks after retirement, there will be an underlying pattern of stability and continuity from the pre-retirement period.

7. Wives will not report their husbands' retirement as a major adjustment problem.

8. Disagreement between husbands and wives on who accomplished the managerial tasks will be negatively associated with levels of satisfaction and perceived managerial competence.

9. Increased involvement by men after retirement in home managerial tasks will be associated negatively with ratings on the quality of task performance.

10. Differences in educational background and health conditions are expected to influence the distribution of managerial tasks in the family. (Higher education will be associated positively with accomplishment of complex managerial tasks. Poor health will result in less involvement.)

11. Perceived managerial competence will be associated positively with income, net worth, and ratings of life satisfaction.

## CHAPTER II

### REVIEW OF LITERATURE

The review of literature begins with an examination of the preference of the retired generation for living in separate housing accommodations. A comparison is then made of the proportion of aged people who live in households, and in institutions. Discussed next are health conditions as they affect independence in living arrangements for the elderly. The costs to individuals and the public are then considered for different levels of care within institutions. The chapter concludes with a review of findings from home management, housing, family life, and social gerontology research on the managerial practices, competence, problems, and adjustments of retired couples.

#### Separate Housing Preferred for the Aged

One justification for an emphasis on managerial competence in old age is the preference of each generation for separate housing accommodations. For example, Kreps (1965) reported that there is a growing tendency for the family, irrespective of generations, to maintain its own home.

This movement towards independence in living arrangements is reflected both in the increased proportion of aged couples and individuals who maintain separate living quarters, and in earlier marriage and family formation on the part of those persons who face one or more years in school before joining the full-time labor force (Kreps, 1965, p. 267).

Streib and Thompson (1960) reported that there is an important intergenerational expectation and practice of independence and non-interference. Britton and Britton (1967) reported that there is a mutual desire of adult generations to live separately. In studies of three generation households in two Pennsylvania communities, they found that six of ten of the two adult generations preferred to live alone in their own homes. In a Minnesota survey of 1,025 urban, non-institutionalized aged, Taves and Hansen (1963) found that fewer than 10 percent said they wanted to live with their children.

Montgomery (1965) reported that "an examination of publications regarding the conditions which older people want and need, places independence near the top of the list" (Montgomery, 1965, p. 84). On the basis of his research on 510 aged persons in central Pennsylvania, Montgomery (1965) concluded that living in one's own home by no means indicates total independence. Assistance may be needed or provided by others. Older persons can appropriately be evaluated on a continuum of independence-dependence (Montgomery, 1965).

In 1967, The Metropolitan Life Insurance Company reported from census data that only 3.5 percent of the men and 4.4 percent of the women age 65 and over in the United States lived in institutions. An additional 3 percent of the men age 65 and over and 2 percent of the women age 65 and over lived in other group quarters or quasi-households rather than institutions. Eighty-five percent of the men and 66 percent of the women age 65 and over lived in family households, including the households of relatives. The remaining 15 percent of the men and 34 percent of the women lived alone or with non-relatives in households (Statistical Bulletin, June, 1968).

Dorothy Dickins (1964) prepared a summary on the current status of and the need for research in gerontology. She covered many subjects relevant to home management including adjustment, health, housing, activities, time, economics, clothing, and foods. Dickins observed that "one of the more important needs of older persons is adequate housing of all types, within their ability to pay, and in areas in which they desire to live" (Dickins, 1964, p. 4). She indicated that many dwellings of older people are too large and lack adequate facilities, while others are structurally unsound or are poorly arranged. There is a lack of agreement on the type of housing required for the older couple, the widowed spouse, the single person, or the ill. The questions deal with problems of specialization, segregation, and financing. Dickins (1964) concluded her

analysis with a call for more research and more information services on housing, equipment, and related legislation for the aged.

Some of the problems of housing for the elderly in Alabama, Florida, Georgia, Tennessee, and East Texas were discussed by Bailey, et al. in their research bulletin published by the Agricultural Experiment Stations of those states. They reported that:

Provision of adequate housing and social services of various kinds for retirees is yet to be demanded by rural southerners. Nevertheless, the findings of this survey indicate public action is needed to solve some of the human issues involved in rural retirement, including substandard housing, and the social adversities of rural isolation (Bailey et al., 1968, p. 33-34).

On the basis of data from the Cornell Research Program on Housing for the Aged, Beyer and Wahl (1963) reported on some of the problems of the elderly living in independent household units that were rented, and units which were occupied rent free. One third of these units did not have access to the bathroom except through another room. Clothes closets were not available in many of the respondents' bedrooms. Handrails were missing on the stairways of many units. A significant percentage lacked hot running water and direct heat in the bathroom or bedroom. These researchers reported that:

Structurally, the greatest deficiencies were in foundations, although many units were also found to have deep wear on door sills, door frames, or outside steps; and shaky or unsafe porches and steps (Beyer and Wahl, 1963, p. 27).

Beyer and Wahl (1963) also pointed out that the financial value of a house is important to the elderly because it is the major item in their asset position, even though it is a non-liquid asset. The length of residence in a particular neighborhood influences the number and kinds of contacts the elderly have to fulfill their social needs. This is one of the reasons why the elderly want to stay in familiar neighborhoods. However, older people who lived in the households of others knew fewer families in the neighborhood regardless of the length of residence in that neighborhood.

On the basis of their study, Beyer and Wahl (1963) proposed several solutions to the housing problems of the elderly. The aged should live in their own homes as long as possible and benefit from community care and service programs. Those who are still able to live independently, but cannot remain in their present dwellings should have new, planned housing units provided with the help of state and federal financial assistance for construction. Cultural, recreational, and social programs should be developed so that older people may lead meaningful lives in the community. Homes for the aged should be provided for those who need constant care and supervision for physical or mental infirmity. Nursing homes are needed for the chronically ill.

Beyer and Woods (1963) reported from their studies of 5,202 older people from New York, Illinois, St. Louis, and Los Angeles

that many of the elderly have nine or ten hours a day remaining after obligated activities are performed. Visiting and television viewing are the two favorite activities which occupy this unobligated time. Beyer and Woods (1963) stated that nearly all respondents thought that older people should live by themselves as long as they were able to take care of themselves. Even when unable to take care of themselves, four in ten said they should live in their own homes with nursing care. Beyer and Woods (1963) interpret these findings as a prejudice against institutional living:

Traditionally, institutions have not provided the kind of living arrangements which most individuals have desired. The physical facilities of many older institutions and their management have been compared to those of prisons. A sense of security may have been available to the residents, but most of their freedom was lost. While some care was provided, this care often was impersonal (as compared with family care) and often inadequately, if not improperly, administered (Beyer and Woods, 1963, p. 26 ).

They stated further:

The positive aspects of living in one's own home probably represent an even more important reason for the emphasis in favor of independent living. Most elderly consider their home their castle, where they can still make most of their own decisions and where they still have a high degree of freedom. They can more or less select their own friends, decide how close a relationship they want with them, and they have the freedom of planning and undertaking different activities with them. . . .

All of these factors tend to give the elderly more confidence, self esteem, and respect than if they were living in an arrangement where they were completely dependent on others for almost everything (Beyer and Woods, 1963, p. 27).

Although the preference for separate housing results in more work and a complex division of labor for each generation maintaining a separate household, it persists and has been documented in the literature reviewed. Managerial competence may be related directly to the degree of independent living, the condition of health, and the need for various supportive services, or institutionalization for the individual.

#### Importance of Maintaining Health

Competence is influenced by illness and disability. Rosen (1960) reported from the National Health Survey that the highest rates of restricted activity were found among those age 65 and over. The average days of restricted activity were 47.3 per person per year. The days in bed because of illness each year averaged 16.3 per person. The number of physician visits in the office and at home was also highest for those age 65 and over. These factors were related to the higher incidence of chronic diseases in this age group. A Baltimore study showed that only 5 percent of this age group were free of diseases (Rosen, 1960).

The concept of permanent residence in nursing homes or county hospitals for the chronically ill and disabled aged is changing. Vivrett reported that:



The recent but rapidly developing philosophy of rehabilitation for the old, with its understanding of the values of milieu therapy, not only fosters but demands the extended use of the independent living environment and the individual's own home. Thus such advances are indirectly encouraging living outside the walls of the institution and extending the home environment into the older years (Vivrett, 1960, p. 550).

The cost for institutional care of the aged is rising. For example, the maximum monthly rates paid by the State Public Welfare Commission of Oregon for patients age 65 and over in nursing homes increased from \$197 in 1964 to \$265 in 1967. The average monthly costs for all patients increased from \$208 in 1964 to \$300 in 1967 at the Benedictine Center (Arnold, 1969).

Inflation has increased the cost of foods, supplies, equipment, and construction. The Medicare law provides reimbursement for the reasonable costs of patient care. Shortages of nurses, physical therapists, and social workers, have increased salaries, and the competition between institutions for personnel. As the individual's capacity for self determination and self care diminishes, the cost for supportive services increases. In cases of poverty and medical indigence the public is likely to pay much of this increased cost. For example, the State Public Welfare Commission of Oregon made average old age assistance payments in September of 1968 as follows: (1) \$50 for persons living in their own homes or other private households; (2) \$98 for those in a board and rooming house; (3) \$139

for those in homes for the aged; and (4) \$183 for those in nursing homes (Lippmann, 1968).

On the average, private patients pay higher fees than public welfare clients in homes for the aged and in nursing homes. At the Benedictine Center for Nursing and Rehabilitation there is a difference of \$130 per month between the maximum welfare rate of \$265 and the minimum private rate of \$395 (Arnold, 1969). Substantially greater private and public expenditures are made for individuals who require the more complex medical and professional services provided in extended care facilities and general hospitals. Data for September 1968 from Blue Cross of Oregon indicated that the average monthly cost for services in extended care facilities was \$578. The cost in general hospitals was more than three times higher, at an average of \$1,843 per month (Anderson, 1968).

#### Home Management Studies

Gross (1948) found that older homemakers compared unfavorably to young and middle aged homemakers, on a scale measuring managerial practices and competence.

The score in management increased steadily with the age of the homemaker until the peak was reached between her 45th and 50th year, or when she had been married between 20 and 30 years. Then it dropped considerably (Gross, 1948, p. 18).

Gross (1948) found age and experience to be the most important factors related to different home management scores. The scores for women age 50-59 (137.8) were lower than the 40-49 age group (161.1). Those age 60 and over had lower scores than any other age group. Managerial scores were based on interview data from homemakers questioned on six factors, including time and energy, money management, household production, conservation of goods, activities for the future, and development and incentives in management. Increases in managerial scores paralleled advances in education. The rise in managerial scores was also linked with a rise in the economic levels (Gross, 1948).

Goetz (1965) conducted research on the housekeeping problems of the older worker. She emphasized the desire of older people to maintain their own autonomy and housing as long as possible. Goetz reported that we have not undertaken depth studies of the difficulty of household tasks as one grows older. Therefore, information is lacking which could help improve the management of housekeeping during retirement. Education, rehabilitation, and services for independent living were seen as under-emphasized and inadequate. A majority of older housekeepers had difficulties in ironing (83%), washing windows (79%), and shopping (53%) (Goetz, 1965). Few had used principles of work simplification, or had given thought to rearrangement of supplies and equipment, and to energy saving methods.

### Observations by a Home Management Author

Wilson's (1960) article on living arrangements during retirement identified some problems arising in the daily routines of couples such as extra guests, impulsive or unscheduled trips, and states of lassitude in the husband.

### Studies in Family Life

Hill (1965) and his associates studied decision making throughout the life cycle, especially in the area of consumership and inter-generational relations, with a sample of intact, three generation families living in the Minneapolis-St. Paul area of Minnesota. They reported some major differences in the patterns of management for each generation. The parent generation was most independent, the grandparent generation was next, and the married child generation had the most problems requiring various kinds of help from the family and other sources. The married child generation refers to the youngest of the three generations in the families studied. The grandparents received more help than they gave on the problems of finances, emotional gratification, household management, and illness (Hill, 1965). These findings reflect some of the economic, emotional, and physical dependencies in old age.

Hill (1965) also found that the grandparent generation was the

least equalitarian with regard to patterns of authority. Either the husband or the wife tended to dominate the older couple families. In the area of role allocation older couples were unconventional, with both husband and wife crossing the sex line or reversing the traditional division of labor. The grandparent generation expressed the fewest number of all kinds of plans during the year of the study. They were least active in the areas of acquiring durables, making financial changes, remodeling, and redecorating their housing. The grandparent generation made the fewest plans, and took the fewest actions, but fulfilled the highest proportion of its plans. This generation scored the lowest on rational decision making, which included seeking alternatives, setting policies, and seeking information from experts outside the family. However, in evaluating the results of decisions and actions, the grandparent generation ranked second highest, next to the parent generation, on satisfaction (Hill, 1965).

Ballweg (1967) conducted a study of 52 urban couples, age 65 and over to compare performance on 12 tasks in households where the husband was retired. He determined who performed the tasks, and evaluated the wife's feelings about her husband's involvement. He found that retired husbands increased their household task activities and their wives decreased their involvement in tasks performed on an individual basis. Even with these individual changes,

the frequency of tasks shared between husbands and wives remained about the same. The husband's increased involvement was not general, but rather centered on selected tasks. Wives of both re-tired and working husbands were satisfied with the extent of participation by the husband. The husband's decision making was not generally offensive to the wife. Thus, the husband's retirement including increased time around the house and task involvement, did not produce a general pattern of maladjustment or negative feeling (Ballweg, 1967).

### Social Gerontology Studies

Adjustments during the early retirement period were emphasized by Lipman's (1961) study of role conceptions and morale of re-tired couples. Male isolation from the occupational system, he reported, may be a serious shock, with grave effects on his life pattern. Adaptation of the male to retirement requires a redefinition of both social functions and familial roles. Lipman (1961) found that one of the adaptive mechanisms for the retired male was the creation of a new role in which he jointly performed household chores with the wife. This pattern of joint performance was assumed voluntarily by the majority of men and women. The husband's participation in household chores resulted in high satisfaction, new common interests, and improved marital adjustment. The wife does not

retain the same role conceptions after the husband's retirement. Her instrumental orientation of "good housewife and homemaker," can no longer be the major distinction between them since both are working on household tasks. In Lipman's study, women who maintained a housewife-homemaker orientation instead of a social, affective, expressive orientation manifested the lowest levels of morale (Lipman, 1961).

Kerckhoff (1964) described conditions of variable adjustment to the problems of retirement. When the retired husband had frustrated expectations which resulted in his responding negatively to retirement, the wife became more involved in the retirement process and had to adapt more to his problems. His study demonstrated that planning for retirement was especially difficult when husbands were deeply involved and wives were unconcerned. Few couples in his study had made any plans for retirement (Kerckhoff, 1964).

## CHAPTER III

### METHODOLOGY

This chapter explains the procedures employed in this investigation. The activities of preparing and pre-testing the interview schedule are discussed first. The sampling procedures are considered next, followed by those for selecting and orienting interviewers. The chapter is concluded with discussions about data collected, cross tabulations completed, and statistical tests applied.

#### Preparation of Interview Schedule and Pre-testing

Over 300 items were initially prepared as potential measures of the different types of managerial tasks and perceptions of managerial competency. A pre-test was conducted among ten couples who represented different occupations and housing accommodations. The pre-test helped to eliminate nonproductive questions, and to increase the precoded categories. The 300 items were tested and reduced to a total of 63 tasks and 25 competency items through the pre-test interviews, staff reviews, and student evaluations.

A pattern of separate but simultaneous interviews, conducted by teams of two interviewers, was chosen for this study. Although this pattern added both costs and complications, it was essential to obtain data for comparisons between husbands and wives.



### The Sample

This research was designed to describe and compare the distribution of home managerial tasks, and to measure the levels of perceived competency between an urban and a rural sample of retired couples willing to be interviewed in their homes.

The following criteria were established for couples in the study. Husbands had to be retired from their full time employment and had to be at least 60 years old. The couple had to experience the husband's retirement together. A level of physical and mental health was required which permitted interviews with both husband and wife. The couples had to live in the cities or adjacent rural areas of Corvallis, Philomath, and Aurora, Oregon.

Initially, the intention was to limit the study to a sample of retirees from governmental, educational, and business institutions who had held professional, scientific, or administrative positions. Lists of known retirees were thus obtained from the Oregon State University and from agencies of city and county government. However, consultation with faculty members led to the decision to sample a broader representation of both occupations and employers. This plan would allow for broader generalization and application of the findings.

The resource available for this general sampling in Corvallis

was the voter registration file at the Benton County Courthouse. All of the cards in the precincts surrounding Corvallis were reviewed for information about age, employment-retirement, and marital status. A precinct list was prepared of those who were married, who were age 60 and over, and lived within the sample boundaries. This list was compared with those from the University and from the city and county government to eliminate duplication of names.

Forty-nine (56 percent) of the 88 couples on the university and government agency lists agreed to be interviewed. Thirty-one (35 percent) refused to participate. Eight (9 percent) couples were ineligible or inaccessible.

The names of 311 couples, in addition to those already obtained from the university, and city and county government, were identified for screening from the Corvallis area precinct lists. Of this number, 98 of the husbands were not retired. These couples were excluded from the sample because of their employment. Table 1 summarizes results from initial telephone contacts with the remaining 213 retired couples on the lists.

A total of 124 couples from the university, government agencies, and precinct lists agreed to be interviewed. For a variety of reasons, including incompatible schedules for the four people involved, changes in the decision to be interviewed, and sickness, 102 couples from Corvallis were interviewed. (See Appendix F, p. 200).

Table 1. Results of Telephone Contacts with Retired Couples Identified on Area Precinct Lists.

	Number	Percent
Ineligible or inaccessible, i. e., sickness, death, or no telephone	71	33.3
Refused to participate	67	31.5
Agreed to be interviewed	<u>75</u>	<u>35.2</u>
	213	100.0

The final samples included 102 couples from Corvallis and 15 from Aurora. The sample from Aurora was based on a list of retired couples in the village and adjacent rural area prepared by community leaders familiar with families in the area. The field supervisor and interviewers in Aurora were volunteers who interviewed couples with the same schedule and a special supplement on the need for various community services. Information from Aurora couples was obtained primarily for comparative purposes and is reported only in Chapter V.

#### Interviewers and Orientation

The Corvallis interviewers were recruited through a newspaper request for mature, college-educated women for social science research. Fourteen were selected to participate in the orientation session on the basis of their education, experience, and interest.

Seven teams were organized so that each would have a potential of ten or more interviews. The sponsorship, purposes, and background of the study were discussed during the orientation session. Interviewers were told of their responsibilities in collecting and recording data and suggestions were made for establishing rapport with respondents. Finally, recommendations were made for communication and feed-back between interviewers and the supervisor. Interviewers were provided with an authorization letter from the University to verify their status on the project. (Appendix C, p. 192).

#### Establishing Relationships with Respondents and Interviewers

The first contact with potential respondents was by telephone. Calls were made to each potential respondent to determine eligibility, to explain the project, and to obtain approval for an interviewing team to set up an appointment at a mutually convenient time in the respondent's home.

After determining eligibility and obtaining approval, the callers gave the name, address, and telephone number of the couple to be interviewed to an interviewing team. The second call was made by the team member who was in charge of scheduling the appointments.

The two interviewers arrived together at the respondent's home, presented a letter explaining the project, (Appendix B, p.190)

established rapport with the couple, and then interviewed the husband and wife separately in different rooms.

Major areas covered in the separate interview included the following topics: activities enjoyed most in retirement; managerial tasks accomplished in household and family affairs; and satisfaction with the division of responsibilities and sharing of activities. Respondents were also asked to evaluate the quality of task performance and to determine what preparations were made for retirement, and to ascertain who helped to make retirement living meaningful. Questions about perceived managerial competence were also asked. Measures of anomia, satisfaction, and self image were completed with individual respondents. Demographic data, social participation, size of family, and preferences for contact were investigated. Finally, each respondent was asked to evaluate the research.

When the initial interviewing was completed, the four regrouped. The remainder of the interview was conducted with the husband and wife jointly providing answers to questions on health, financial resources, and housing.

#### Quantitative Evaluation and Statistical Tests

Most of the interview data was precoded except for the open end questions. After examining the responses to these questions on about half of the schedules, a coding guide was prepared. Upon

completion of the coding, the data were punched onto cards at the Computer Center of Oregon State University. A counter-sorting machine was used for preliminary summaries of data which were helpful in the choices of appropriate categories and groups for computer cross tabulations.

The Statistics Department prepared a correlation matrix on the managerial competency data which related each item to every other item. Other statistical tests and techniques that have been used in this investigation include the mean; standard deviation; t test; z scores, and chi square. The general chi square formula used at the Computer Center of Oregon State University on the thesis data was as follows:

$$X^2 = \frac{(O - E)^2}{E}$$

where:        O = observed frequency  
                   E = the corresponding expected frequency

The formula used for a two by two table was as follows:

$$X^2 = \frac{N(ad - bc)^2}{(a + b)(c + d)(a + c)(b + d)}$$

### Data Collected and Procedures of Analysis

The data collected can be grouped into three major content areas. The first group is based on retirement and the managerial tasks. The second major area contained the sample's descriptive

variables, including age, sex, education, housing and living arrangements, health, income, net worth, length of marriage and retirement, current employment, and the number of children, grandchildren, and personal friends. The factors of education, health, sex, and the length of retirement were used as independent variables, and were cross tabulated with each managerial task. The third area was based on the respondent's evaluation of self image, anomia, perceived managerial competency, and life satisfaction.

Managerial task data were grouped for study according to functional areas, classifications according to types, husband-wife dominance, changes of involvement after retirement, and husband-wife disagreement on task accomplishment.

To measure managerial competency, respondents rated themselves as they perceived their competence on a one to five point scale for each of 25 items about home management. Scores were derived as a summary of perceived managerial competency. Six components were identified as the major divisions for the measurement of competency. Each component contained at least three but no more than seven items.

A correlation matrix was prepared on the perceived managerial competency data. The means of each item were correlated with all other means and with the overall mean. Correlation values were

transformed to z scores in determining the significance of correlation between the component groups of items. Standard deviations were also computed on the 25 managerial competency items to show the range of answers. A diagram was prepared to show the first, second, and third highest correlations between each item and the other managerial competency items.

The anomia scale used in this study was developed by Mizruchi (1960), as a modification of Srole's scale of anomia. The items used to measure anomia are shown in Appendix A, p. 179 and 180. All items in the series numbered 42-54, except items 44, 46, 51, and 53 were included in the scoring of anomia. These four items were interspersed among the anomia items to avoid a fixed response pattern.

To illustrate one cross tabulation: the number of times a husband and wife differed on the questions of which one performed a managerial task was considered as the disagreement score for the couple. The couples were divided into three groups representing low, average, and high levels of agreement. The objective was to have exactly one-third in each group for purposes of comparison. This proved impracticable because of the distribution of scores. The groups included 32, 40, and 28 percent respectively.

Tabulations comparing low, average, and high agreement scores with different levels of anomia, income, health, years



retired, and task performance were prepared. Some tabulations tested definite hypotheses, while others were purely exploratory. A summary of all cross tabulations in the study is presented in Appendix H, p. 203.

Chi square tests were used to assess statistical significance of the data. The 5 percent level of significance is used throughout this thesis as the standard for accepting a hypothesis. The hypothesis was accepted or rejected on the basis of examining the data and the statistical tests.

Data collected from men and women were compared. Data on perceived managerial competency were combined for each couple to determine if couples with high, average, and low scores had different levels of satisfaction, health, and income.

Perceived managerial competence was compared with length of retirement, years married, occupational rating, education, sex, net worth and income, anomia, quality of performance on managerial tasks for each functional area, rating of life satisfaction, and preparatory activities for retirement. These comparisons were made to determine if and how perceived managerial competency was significantly related to such variables.

## CHAPTER IV

## CHARACTERISTICS OF THE SAMPLE

This chapter is a presentation about age, educational, occupational, financial, housing, familial, social, housing, and health characteristics of the Corvallis sample.

Age

The average age of all respondents was 70.1 years. The median age was 72 for the men and 68 for the women. None of the men was under 60 years old. Twelve of the men and only two of the women were age 80 and over. The ages of the Corvallis respondents in the study are shown in Table 2.

Table 2. Distribution of Ages Reported By Men and Women Interviewed

	Men	Women	Total
45 - 59	0	11	11
60 - 64	2	26	28
65 - 69	27	20	47
70 - 74	35	20	55
75 - 79	23	22	45
80 - 84	11	2	13
85 - 89	1	0	1
no answer	3	1	4
Total	102	102	204

## Education

The educational level of respondents was higher than that of the same age groups reported in the 1960 census of Oregon. In 1960, the median years of education for Oregon men age 65 to 69 was 8.6 in comparison to a median of 9.0 for women of this age group. The median education for men age 75 and over was 8.3 and compares with a median of 8.7 for Oregon women age 75 and over. The median years of schooling completed by men in this sample was 12.0, in comparison with 13.0 for women. The average years of school completed for men was 12.8, in comparison with 13.1 years for women. Table 3 shows the numbers of men and women at each educational level.

Table 3. Years of School Completed by the Respondents

Years	Men	Women	Total
1 - 8	29	8	37
9 - 12	21	39	60
13 - 16	26	43	69
17 or more	26	12	38
Total	102	102	204

Almost four times more men than women reported having completed only part or all of an elementary education. However, almost twice as many women had completed part or all of high school. About four

in ten women and five in ten men had either graduated from or completed some college. More than twice as many men than women had completed 17 or more years of formal education. The larger number of men who did not go beyond grade school may partially be explained by the phenomenon of child labor in the early years of this century.

### Former Occupation

Over half (56 percent) of the retired men had been in professional, technical, and managerial occupations according to the classification scheme of the 1965 Dictionary of Occupational Titles. Examples of their occupations include professor, scientist, judge, civil engineer, teacher, writer, musician, county agent, and store manager. The next highest proportion (13 percent) had been in farming, fishery, forestry, and related occupations. Seven out of the 13 individuals had been farm owner operators. The third largest group retired from structural occupations including electricians, auto mechanics, carpenters, and plumbers. About the same proportion had retired from clerical and sales jobs. Examples of the service occupations include policeman, cook, and a playground director. Two retired truck drivers were classified in the category of miscellaneous occupations. Table 4 is a summary of the numbers and percentages of retired male respondents in each of the seven

occupational groups from the Dictionary of Occupational Titles.

Table 4. Distribution of Husbands' Former Occupations Classified According to Occupational Groups (Dictionary of Occupational Titles, 1965)

	Number	Percent
Professional, technical and managerial	57	55.9
Farming, fishery, forestry, and related occupations	13	12.7
Structural work	11	10.8
Clerical and sales	10	9.8
Machine trades	5	4.9
Service occupations	4	3.9
Miscellaneous occupations	<u>2</u>	<u>2.0</u>
	102	100.0

The former occupations of respondents were ranked according to the North-Hatt scale of social prestige and are shown in Appendix G, p. 201 and 202.

### Income

Almost all respondents provided information about their financial resources. Only three couples did not report their income in 1966. The median income from all sources during the year preceding the interviews was \$5,200.

Table 5. Income Reported for Couples from All Sources in 1966

Amount	Number
\$ 0 - 1,999	4
\$2,000 - 2,999	13
\$3,000 - 3,999	16
\$4,000 - 4,999	15
\$5,000 - 5,999	10
\$6,000 - 6,999	11
\$7,000 - 9,999	17
\$10,000 and over	13
Income not reported	3
	<u>102</u>

The \$5,200 median of this sample was \$372 higher than the median reported by Crabtree (1966) in her recent investigation. She reported a median of \$4,828 on her sample of 60 retired couples living in the retirement community of Woodburn Senior Estates in Oregon (Crabtree, 1966).

The Social Security Survey of the Aged (Epstein and Murray, 1963) was based on a national sample of couples in which one or both spouses were age 62 or over. The median income of this national sample of couples in 1962 was \$2,875, or only 55 percent of the median reported by couples from the Corvallis sample. This difference may be accounted for by the higher educational level and type of employment in the Corvallis sample, the increases in annual incomes from 1962 to 1966, and higher income in the northwest region of the United States.

Respondents were asked to identify their three major sources of income in 1966. Their answers are shown in Table 6. Since each respondent gave three answers, the percentages do not add to 100 percent.

Table 6. Major Sources of Income Reported by Corvallis Couples

	Number (N = 102)	Percent
Social Security Administration	95	93.1
Savings	81	79.4
Pensions	64	62.7
Investments	56	54.9
Insurance	42	41.2
Work by husband	37	36.3
Work by wife	24	23.5
Medical and old age assistance	8	7.8
Children or relatives	5	4.9

Epstein and Murray (1963) reported that 70 percent of the 17.5 million people 65 years old and over were Social Security beneficiaries. The proportion of Social Security beneficiaries in this sample, which was taken four years later, exceeded the national average by 23 percent.

#### Net Worth

Table 7 shows that 4 percent of the respondents had a net worth of less than \$10,000. Epstein and Murray (1963) reported that only one third of their national sample of married couples, age 65 and

over, had assets of \$15,000 or more. Although a precise income comparison of the two samples is impossible because different ranges of net worth were used, the Corvallis sample reported a higher net worth, since 78 percent had \$20,000 or more. The median net worth reported by Corvallis retirees was \$36,400 in comparison to \$25,900 for those studied by Crabtree (1966) in Woodburn Senior Estates.

Table 7. Net Worth Reported for 1966 by the Respondents

Net Worth	Number	Percent
\$ 0 - 9,999	4	3.9
\$10,000 - 19,999	19	18.6
\$20,000 - 29,999	18	17.6
\$30,000 - 39,999	14	13.7
\$40,000 - 49,999	8	7.8
\$50,000 or more	36	35.3
No information	3	3.1
	<u>102</u>	<u>100.0</u>

### Housing

Two-thirds of the respondents lived in homes which were completely paid for, while over one-fifth (22 percent) were still making payments. Of the remaining 12 percent, seven couples lived in rented housing, three couples were in a retirement residence, and one couple had housing provided without cost. Eighty-seven percent lived in single family dwellings and 8 percent lived in apartments.



Three percent lived in dwellings which had one or more rental units in addition to the respondents' home. Two percent lived in duplexes.

Four-fifths of the couples lived alone. One-fifth who had someone else living in their household, reported almost twice as many children as other relatives and nonrelatives living with them.

Table 8. Persons Living with Retired Couples in the Sample

	Number	Percent
Couples Living Alone	82	80.4
Others Living with Couples		
Daughter	8	7.8
Son	4	3.9
Son and Daughter	1	1.0
Other Relative	5	4.9
Non-relative	2	2.0
	<u>102</u>	<u>100.0</u>

The dwellings ranged from three to ten rooms, averaging six rooms for each couple. Three-fourths of the respondents lived in five- to seven-room houses. The dwellings of only 14 couples had less than five rooms. The spare bedroom was the only room not used regularly. Slightly over half reported that they used their spare bedrooms less than once a week.

The interview included a check list of 14 potential housing problems. From a maximum number of 1,428 possible problems (14 x 102 couples), 285 were reported. However, one-fifth did not

report any problems. The remaining four-fifths reported an average of 3.0 problems. Data in Table 9 are presented in order of the number of people reporting problems.

Table 9. Housing Problems Reported by Corvallis Couples

	Number (N = 102)	Percent
1. Taxes too high	47	46.1
2. Painting needed	46	45.1
3. Repairs needed	39	38.2
4. Remodeling needed	36	35.3
5. Neighborhood improvements needed	20	19.6
6. Utilities too costly	11	10.8
7. Storage space inadequate	9	8.8
8. House too old	7	6.9
9. Location inconvenient	6	5.9
10. Too much housework	5	4.9
11. House too big	3	2.9
12. House too expensive to maintain	3	2.9
13. Stairs hard to climb	3	2.9
14. Inadequate facilities	3	2.9

### The Extended Family and Close Friends

Respondents had been married an average of 40 years. They had an average of 2.4 living children, with a range from zero to nine. (Eighty-seven couples had between one and four living children.) About 7 percent did not have any living children. The number of living grandchildren averaged 6.59 in range from zero to 30. The average number of brothers and sisters reported by the

respondents was 2.8. Perhaps due to their older age, the men reported slightly fewer living brothers and sisters, 2.68 in comparison with 2.9 for women.

Close personal friends were defined as those you could communicate with about private matters or problems and from whom you could expect psychosocial support and other non-specified help in time of need. While eight men and four women said they had no such close friends, the average number, reported on separate interview schedules by both spouses, was similar at 10.83 for men and 10.47 for women.

#### Employment-Retirement Status

The length of retirement for husbands is an important variable in this study and averaged 59.7 months, or just under five years. Sixty of the 102 men and 75 of the women were not employed at all. Of the 42 men and 27 women who worked, the women spent an average of 17 more hours per week on the job than the men, 29.4 and 12.24 respectively.

#### Illness and Disability

A list of 40 chronic illnesses and disabilities was read to the respondents. They were asked to identify those conditions which applied to themselves (reportable conditions had been confirmed by a

physician). Men reported a higher incidence of current illnesses and disabilities than women, with averages of 2.82 and 2.52 respectively.

The order of the items in the list on illness and disability in Table 10 is based on the total number of men and women reporting these conditions. The table also gives statistics about differences between men and women.

Four of the 40 illnesses and disabilities were not included in Table 10 because no one reported any rheumatic fever, alcoholism, epilepsy, or mental illness.

The incidence for men was at least double that of women on the following illnesses and disabilities: deafness, general heart trouble, hernia or rupture, palsy, missing limbs and appendages, chronic skin trouble, stroke, cancer and tumor, cyst or growth. The problems affecting proportionally more than twice as many women than men were: varicose veins, allergies, high blood pressure, gall bladder and liver trouble, permanent stiffness or deformity, serious visual problems, anemia, and asthma.

The respondents were asked if anyone in their household was confined in any way. Confinement referred to definite limitations on their ability to get around the household or to go other places. Although an average of 2.67 illnesses and disabilities were reported by the respondents, none of the women were confined. One man was

Table 10. Incidence of Illnesses and Disabilities Reported by 102 Corvallis Couples

Illness or Disability	Total		Men		Women	
	(N=204)	Percent	(N=102)	Percent	(N=102)	Percent
1. Arthritis or Rheumatism	75	36.8	35	34.3	40	39.2
2. Heart Trouble	41	20.1	27	26.5	14	13.7
3. Deafness or Serious Hearing Trouble	32	15.7	26	25.5	6	5.9
4. Repeated Trouble with Back or Spine	32	15.7	13	12.7	19	18.6
5. Hemorrhoids or Piles	26	12.7	11	10.8	15	14.7
6. Allergies	24	11.8	8	7.8	16	15.7
7. Hardening of Arteries	24	11.8	15	14.7	9	8.8
8. Trouble with Varicose Veins	22	10.8	6	5.9	16	15.7
9. Hay Fever	21	10.3	11	10.8	10	9.8
10. High Blood Pressure	21	11.3	6	5.9	15	14.7
11. Stomach Ulcer	20	9.8	9	8.8	11	10.8
12. Hernia or Rupture	19	9.3	19	18.6	0	0.0
13. Repeated Sinus Attacks	19	9.3	12	11.8	7	6.9
14. Serious Visual Trouble	16	7.8	6	5.9	10	9.8
15. Permanent Stiffness or Deformity	13	6.4	4	3.9	9	8.8
16. Chronic Gallbladder or Liver Trouble	12	5.9	1	1.0	11	10.8
17. Any Other Chronic Stomach Trouble	10	4.9	5	4.9	5	4.9
18. Chronic Skin Trouble	10	4.9	8	7.8	2	2.0
19. Missing Fingers, Hand, Arm, Toes, Foot or Leg	10	4.9	8	7.8	2	2.0
20. Prostate Trouble	10	4.9	10	9.8	0	0.0
21. Chronic Nervous Trouble	9	4.4	4	3.9	5	4.9
22. Palsy	9	4.4	8	7.8	1	1.0
23. Diabetes	8	3.9	5	4.9	3	2.9
24. Stroke	8	3.9	6	5.9	2	2.0
25. Anemia	7	3.4	0	0.0	7	6.9
26. Asthma	7	3.4	2	2.0	5	4.9
27. Tumor, Cyst or Growth	7	3.4	5	4.9	2	2.0
28. Cancer	6	2.9	5	4.9	1	1.0
29. Kidney Stones or Chronic Kidney Trouble	6	2.9	3	2.9	3	2.9
30. Thyroid Trouble or Goiter	5	2.5	1	1.0	4	3.9
31. Chronic Bronchitis	4	2.0	2	2.0	2	2.0
32. Other Congenital Condition	3	1.5	0	0.0	3	2.9
33. Paralysis of Any Kind	2	1.0	2	2.0	0	0.0
34. Any Speech Defect	1	0.5	1	1.0	0	0.0
35. Cleft Palate	1	0.5	1	1.0	0	0.0
36. Tuberculosis	1	0.15	1	1.0	0	0.0

confined to a wheelchair and two were confined to the home.

In summary, the 102 couples interviewed in this study had lived an average of 70 years, had completed high school, had an annual median income of \$5,200 a year, and a median net worth of \$36,400. Nine out of ten lived in their own homes and eight in ten did not have anyone else living with them. They had been married an average of 40 years and the modal couple had two living children. The husbands had been retired on the average of five years. Fifty-six percent had been in professional, technical, and managerial occupations. An average of 2.67 chronic illnesses and disabilities per person was reported. However, only three men and no women were confined to bed or the home.

## CHAPTER V

## FINDINGS OF THE STUDY

Responsibilities at Home After Retirement and  
Preparation for Retirement

Does the home environment provide important tasks and activities for retired couples? When asked how they would feel if they had no responsibilities at home, 22 percent said "I'd be lost." Half of the couples reported such statements as "disappointment," "dissatisfaction," "hate," "unhappiness," "miserable," "terrible," "crazy," or "nuts." Ten percent said they would feel "useless," "bored," "worthless," or "without a rudder." Only 6 percent did not know how they would feel if they did not have responsibilities at home. Four percent said they would feel "better," "fine," "more free," or "quite all right," at least on a temporary basis.

Another question asked what they thought they would do without responsibilities at home. Men were less imaginative about specific possibilities. Eighty percent of the men and 60 percent of the women did not suggest an alternative. Women mentioned hobbies and volunteer work in the church and community more often than men. Three percent of the men said they would engage in more recreation and sports. Five percent of the men and 3 percent of the women said they would fold up or die.

The importance of home responsibilities in helping individuals adjust to retirement was indicated by the fact that almost half of the men and women rated this factor with a five on a one-five point scale. Five was the highest or most positive rating, three was average, and one was the lowest rating. About 19 percent rated it with a one or two, and 32 percent gave it three-four points. On the basis of a chi square test, the responses of men and women were not significantly different. The 5 percent level of significance has been used throughout this thesis as the standard for accepting a hypothesis.

Another question was raised on whether or not marriage and family activities helped in adjustment to retirement. The data presented in Table 11 were indicative of the supportiveness of the family to the individual in making adaptations to retirement. Seven in ten men and six in ten women rated marriage and family activities at the highest point on the scale.

Table 11. Ratings by Men and Women on the Contributions of Marriage and Family Activities to Adjustments in Retirement

Rating Points	Men N = 102 Percent	Women N = 102 Percent
1 - 2	13	15
3 - 4	16	27
5	<u>71</u> 100	<u>58</u> 100



The four questions on which the responses in Table 11 were predicated were: how would you feel if you did not have any responsibilities at home? what would you do? how important are responsibilities at home in helping you adjust to retirement? have your marriage and family activities helped you adjust to retirement? The responses to the above questions support the hypothesis that:

home managerial and family activities after retirement will be viewed as very important and perceived alternatives to these activities will be very limited.

#### Most Enjoyable Activities, and Reasons Given

A question was asked about the activities respondents enjoyed most in their lives. It was an open end question and averaged 2.3 responses (see Table 12).

The 42 percent of women reporting most enjoyment of fishing, hunting, golfing, and other outdoor sports may be rewarding to the 59 percent of retired husbands who are similarly inclined. About 30 of the respondents reported enjoying traveling, trailering, and camping. Only 7 percent of the sample expressed most enjoyment of homemaking and home maintenance activities, in comparison with the 44 percent reporting gardening and yard work as a most enjoyed activity. Nineteen percent of the men and 15 percent of the women reported enjoyment of study, reading, and discussion group activities. More than twice as many women as men enjoyed social,

Table 12. Activities Most Enjoyed by Corvallis Men and Women in Retirement

	Men (102)		Women (102)	
	N	%	N	%
1. Fishing, hunting, golfing, other outdoor and spectator sports	60	58.8	43	42.2
2. Gardening and yardwork	51	50.8	39	38.2
3. Traveling, trailering, camping	34	33.3	25	24.5
4. Church participation and related service work	8	7.8	27	26.5
5. Reading, study, and discussion group activities	19	18.6	15	14.7
6. Visiting, entertaining, and social activity with family and friends	7	6.9	21	20.6
7. Attending a club, social, or fraternal organization	9	8.8	15	14.7
8. Homemaking and home maintenance	8	7.8	7	6.9
9. Working, business, or profession	8	7.8	4	3.9
10. Sewing, knitting, and crocheting	0	0.0	8	7.8

religious, and service activities. Only one man and one woman of the 204 respondents said they were unable to do anything enjoyable.

### Basis for Enjoyment of Activities

The answers given to an open end question on the enjoyment of activities were tabulated for a comparison between men and women. The two major reasons given for the enjoyment of activities were maintaining usefulness, using time, and keeping busy; and providing social satisfactions and companionship.

Sixty-three percent of enjoyed activities were shared primarily with the husband or wife. Friends ranked next highest at 15 percent and various family members when combined as a group, held the third prominent position for the sharing of activities with these retired couples. Six percent of the respondents said that the activities they enjoyed most were done alone.

### Preparations for Retirement

The preparations made for retirement considered in this study were classified into three major groups:

- (1) decision-making in the areas of finances, health, and housing;
- (2) educational and informational gathering processes; and
- (3) observation of other retirees and experiences similar to retirement.

Table 13. Reasons Given for the Enjoyment of Activities

	Men (102)		Women (102)	
	N	%	N	%
1. Maintains usefulness, keeps me busy, or uses my time	42	41.2	37	36.3
2. Provides social satisfactions and companionship	25	24.5	50	49.0
3. Fulfills a personal interest, always liked it	22	21.6	19	18.6
4. Allows an enjoyment of outdoors and nature	23	22.5	10	9.8
5. Provides more freedom, relaxation, or entertainment	16	15.7	16	15.7
6. Improves health or provides mental activity	6	5.9	2	2.0
7. Allows personal development, self-expression, and service to others	7	6.9	17	16.7
8. Enables me to see new places and do new things	8	7.8	8	7.8

Seventy percent of the sample took definite financial steps to prepare for retirement. Decision-making about what to do and how to retire successfully was in second place as reported by 57 percent of the respondents. About 45 percent obtained medical care to improve and maintain health; 45 percent also read educational materials, but only 5 percent went to school to prepare themselves for retirement. One-third of the respondents moved to a different house or apartment to spend their retirement years. Fourteen percent had some form of advice or guidance.

Approximately one in four of the interviewees reported preparation in the form of observing retirees to learn how to retire. Thus, socialization experiences are part of the anticipatory and transitional behavior for retirement.

### Contributors to a Meaningful Life After Retirement

The respondents rated the contributions of others to the quality and meaning of their lives in retirement on a one to five point scale. Individuals most intimately or directly related were reported as having contributed most to a meaningful life in the retirement years. Figure 1 shows the retired person at the base and identifies a pattern of decreased contribution to a meaningful retirement with each level further removed from the retiree. The points shown are the combined average ratings of men and women for each

relationship. The combination of ratings results in a possible maximum of ten points. Spouses were most helpful; daughters were next.

(Points)

Individual or Family Counselor (2. 2)

Educator or Teacher (3. 0)

Financial or Legal Adviser (3. 2)

Work Associates (4. 3)

Doctor-Minister (5. 2)

Retired Peers (5. 3)

Neighbor (5. 8)

Son-Friend (6. 5)

Daughter (7. 0)

Wife-Husband (9. 2)

RETIRED PERSON

Figure 1. Contributors to a Meaningful Life in the Retirement Years

These findings are indicative of the importance of family relationships in sustaining a meaningful life after retirement. Friends, neighbors, and peers constitute the next most important groups in this regard. The doctor and minister or other religious leader are ranked most important among the professional people identified.

The lack of retirement education, guidance, and counseling programs may influence the help available from the last four professional groups. Since these are highly specialized services, they would probably not be needed or used as much as medical or religious services.

### Distribution and Dominance of Managerial Tasks

One of the primary purposes of this investigation has been to describe and interpret patterns in the division of labor among retired couples. Table 14 is a comprehensive summary of who accomplished the 63 managerial tasks studied. Percentages given are based on the combined answers of husbands and wives. The tasks are listed by functional area and are in the same sequence followed during the interview. Although percentages are given for individual tasks in Table 14, the subsequent narration is based on groups of tasks.

The first narrative analysis of the managerial task data is based on the functional areas. All but two of the functional areas refer to groups of tasks that are inter-related because of a similar focus. The two exceptions are functional areas three and seven in Table 15. These two areas include some tasks which are not directly inter-related but were combined to reduce the number of categories.

Table 14. Allocation of Managerial Tasks after Retirement by the 102 Couples Interviewed\*

R = Routine    T = Transactional C = Complex    I = Interpersonal		Husband %	Wife %	Equal <sup>1</sup> %	Other <sup>2</sup> %	DNA <sup>3</sup> %	Total %
<u>Food Service and Related Activities</u>							
(T) Shopping for, selecting, and buying groceries		13.7	45.1	41.2	0.0	0.0	100
(R) Storing food and other kitchen supplies		8.3	65.7	25.5	0.0	0.5	100
(C) Planning meals and menus for nutrition and enjoyment		2.5	84.3	12.7	0.0	0.5	100
(C) Preparing and serving the food		3.9	85.3	10.8	0.0	0.0	100
(R) Setting and clearing dishes from table		14.2	47.6	38.2	0.0	0.0	100
(R) Washing or drying dishes		14.2	47.5	37.3	0.5	0.5	100
(R) Disposal of waste, emptying garbage		58.4	22.5	17.6	1.5	0.0	100
<u>Clothing, Linens, and Related Activities</u>							
(T) Comparing, selecting, and buying clothing		2.5	40.2	56.8	0.5	0.0	100
(R) Washing and drying clothes and linens		7.4	83.3	7.8	1.5	0.0	100
(R) Ironing		2.9	88.7	2.5	5.4	0.5	100
(R) Folding and storing clothes and linens		2.9	92.2	4.4	0.5	0.0	100
(T) Obtaining dry cleaning services		26.5	42.2	27.9	3.4	0.0	100

\*Percentages on the table add horizontally to 100 percent.

<sup>1</sup> Equal refers to equal sharing of the task as perceived by husbands and wives.

<sup>2</sup> Other refers to allocation of the task to someone other than the husband or wife.

<sup>3</sup> DNA means that the couple did not consider this to be a task in their household.



Table 14. Continued

	Husband %	Wife %	Equal %	Other %	DNA %	Total %
<u>Yard, Garden, Secondary Living Areas, and Related Activities</u>						
(C) Mowing, raking, weeding, and fertilizing lawn	71.1	3.9	5.9	10.8	8.3	100
(C) Maintaining flower beds and shrubs	49.0	21.6	19.1	3.4	6.9	100
(C) Planting, watering, weeding, and harvesting vegetables, berries, nuts, etc.	46.7	9.8	22.5	2.9	18.1	100
(R) Cleaning garage, basement, tool shed, work bench, and outdoor service areas	69.5	7.4	11.8	4.4	6.9	100
(R) Handling and storing screens, lawn furniture, etc.	71.6	3.4	8.8	5.4	10.8	100
(T) Driving the car and chauffeuring	47.6	11.8	32.8	0.0	7.8	100
(T) Obtaining maintenance, servicing, and repairs for the car	77.0	5.4	6.4	3.4	7.8	100
(T) Shopping for, selection, and purchase of new or used cars	30.9	2.5	57.8	0.0	8.8	100
<u>Household Maintenance, Cleaning, and Related Activities</u>						
(R) Sweeping, dusting, or vacuuming floors	14.7	52.5	28.9	3.9	0.0	100
(C) Major seasonal or annual housecleaning	6.4	49.5	31.9	8.3	3.9	100
(R) Making beds	5.4	65.2	27.9	1.5	0.0	100
(C) Repair of house, furniture, and appliances	71.6	3.9	4.4	18.1	2.0	100
(C) Painting inside walls, cabinets, trim, etc.	41.6	14.7	20.1	16.7	6.9	100
(C) Care of indoor plants or house pets	9.3	67.2	12.7	1.0	9.8	100

Table 14. Continued

	Husband %	Wife %	Equal %	Other %	DNA %	Total %
<u>Marital and Family Relations</u>						
(I) Assuming leadership in household and family affairs	11.8	20.1	68.1	0.0	0.0	100
(I) Showing concern for and listening to companion's problems	2.9	7.8	88.8	0.0	0.5	100
(I) Writing letters or calling children or grandchildren	7.4	64.6	25.5	0.5	2.0	100
(I) Expressing respect, appreciation, and love for companion	2.9	4.4	92.2	0.0	0.5	100
(I) Visiting children and grandchildren	0.5	3.4	88.7	0.0	7.4	100
(I) Giving encouragement and moral support to companion	1.0	5.9	93.1	0.0	0.0	100
(I) Planning special family events (i. e. picnic, reunion)	4.9	4.9	87.7	1.0	1.5	100
<u>Financial Resources and Management</u>						
(C) Study of government programs related to personal and family finances	28.4	8.8	48.6	0.0	14.2	100
(T) Study, decision, and investment in property, stocks, and bonds	24.5	3.4	61.3	0.5	10.3	100
(T) Study, decision, and purchase of life, hospital, and medical insurance	17.6	9.8	68.2	0.5	3.9	100
(T) Study, decision, and purchase of car, fire, liability, and other property insurance	42.1	3.9	51.0	0.5	2.5	100
(C) Figuring annual federal and state income taxes	37.7	17.2	7.4	33.8	3.9	100

Table 14. Continued

	Husband %	Wife %	Equal %	Other %	DNA %	Total %
<u>Financial Resources and Management (continued)</u>						
(C) Maintaining records of income and expenses	38.2	40.2	18.1	1.0	2.5	100
(C) Preparing the monthly and/or annual budget	8.8	7.0	14.7	0.0	49.5	100
(T) Paying the bills	42.7	32.8	24.5	0.0	0.0	100
(T) Making business phone calls and writing letters	35.3	36.3	24.0	0.5	3.9	100
(T) Signing and cashing income checks and making bank deposits	34.7	12.3	52.0	0.5	0.5	100
(T) Earning money through gainful employment	27.9	14.7	9.3	0.5	47.6	100
(C) Making goods of economic value for the home, couple	12.3	27.9	27.5	0.5	31.8	100
(C) Responsibility for the family estate, the will, and related matters	13.7	4.4	78.0	0.5	3.4	100
<u>Social--Recreational, Intellectual, Religious, Community</u>						
(I) Visiting with neighbors and friends	4.4	19.1	74.5	0.0	2.0	100
(T) Encouraging and participating in religious and church related activities	3.4	22.1	63.2	0.5	10.8	100
(T) Voting, participating in civic affairs, being a citizen	2.0	2.9	94.6	0.0	0.5	100
(I) Receiving and serving as host/hostess to guests, entertaining	1.0	24.5	72.0	0.0	2.5	100
(I) Stimulating mental activity, thinking, and intellectual pursuits	12.7	18.6	67.2	0.0	1.5	100
(T) Engaging in volunteer, charitable, or community service work	7.8	27.0	36.8	0.5	27.9	100

Table 14. Continued

	Husband %	Wife %	Equal %	Other %	DNA %	Total %
<u>Social--Recreational, Intellectual, Religious, Community (continued)</u>						
(C) Encouraging and participating in hobbies and avocational activities	21.6	12.7	51.5	0.0	14.2	100
(I) Initiating and participating in social activities	2.0	27.9	56.4	0.5	13.2	100
(C) Engaging in regular recreation, sports, etc.	19.1	4.4	36.8	0.5	39.2	100
<u>Health</u>						
(R) Promoting and engaging in routine physical exercise	21.1	11.3	41.2	1.0	25.4	100
(T) Encouraging and obtaining regular physical examination	10.3	13.7	68.6	0.0	7.4	100
(R) Using or supervising the use of prescribed drugs	13.7	21.1	56.9	0.0	8.3	100
(C) Assuming responsibility for safety and accident prevention	20.1	9.8	68.6	0.0	1.5	100
(C) Guiding health and hygiene practices in the home	2.9	27.0	69.1	0.0	1.0	100
(C) Providing personal care of sick or disabled family member and doing more housework in times of illness or disability	6.4	22.1	63.6	0.5	7.4	100
(T) Obtaining medical and dental care as needed	6.4	11.8	81.3	0.0	0.5	100
(T) Deciding on hospital, nursing home, or other facility necessary	1.5	4.4	83.3	1.0	9.8	100

Table 15. Patterns of Dominance by Husbands and Wives in the Functional Areas

Functional Area	No. of Items	Dominant Person
1. Food	7	Wife
2. Clothing	5	Wife
3. Yard, Garden, Secondary Living Areas, and Transportation	8	Husband
4. Household Maintenance and Cleaning	6	Wife
5. Marital and Family Relations	7	Wife
6. Financial Resources	13	Husband
7. Social, Recreational, Intellectual, Religious, and Community	9	Neither
8. Health	8	Neither
	<u>63</u>	

The data on the allocation of managerial tasks indicate a definite pattern of female dominance in the accomplishment of tasks in the areas of food, clothing, housecleaning, and marital and family relations. These conclusions are based on a quantitative judgment that the establishment of dominance in a given task or area requires the allocation of at least 10 percent more of the total potential responses to either the husbands or wives. If the task was performed by the husband or wife only (rather than by someone else or not at all), dominance would be established by whoever did 60 percent of the tasks. Men clearly dominated the tasks in the yard, garden, secondary living areas, transportation, and finances.

A pattern of sharing existed in the accomplishment of managerial tasks in the health area even though a few more of the wives

carry out responsibilities related to health.

The pattern for the social-community area was one of sharing between husbands and wives. However, men dominated slightly in regular recreational and sports activities. Wives dominated in social and church activities such as visiting, entertaining, church participation, volunteer community service, and other social activities.

### Changes in Tasks Associated with Retirement

The analysis of data reported in this section of the thesis has been designed to test two hypotheses:

- (1) the husband's retirement from gainful employment will result in increased involvement in the managerial tasks at home and in family affairs; and
- (2) the husband's increased involvement at home will be accompanied by a complementary pattern of decreased involvement by the wife.

Men and women indicated whether their involvement in each task increased, decreased, or remained the same upon the husband's retirement. The procedure used to test these hypotheses was a chi square test determining if the frequencies reported differed significantly from those frequencies expected by chance. The responses of husbands and wives were summarized and compared on each cross tabulation. In order to evaluate the possible influence of husband-wife pairs, the sample was divided in half by selecting

every other man and every other woman, avoiding the retention of any married couple. The chi square tests were then applied to the tabulations on this split half of the sample.

Patterns of dominance by wives and husbands in different functional areas related to managerial task changes in a number of ways. In the three major areas of household work (food, clothing, and cleaning) husbands significantly increased their involvement after retirement. There was a pattern of increased involvement of husbands and decreased involvement for wives in the food area. Chi square tests on each of the seven food items were significant both for all couples and for the split half randomized test of men and women. The men were indeed "invading the kitchen."

On the three major items of housecleaning (routine cleaning of floors, annual cleaning of the house, and bedmaking) the chi square tests on the whole sample and the split half supported a significant complementary pattern of more work for men and less for women. In the clothing area, men substantially increased their involvement after retirement in the tasks of washing and drying clothes and obtaining dry cleaning services. However, they were not more involved in purchasing, ironing, or folding and storing clothes.

Men also increased their work in managerial tasks in the yard and garden, while wives diminished their involvement. Men became more involved in the two tasks of:

- (1) mowing, raking, weeding, and fertilizing lawn; and
- (2) maintaining flower beds and shrubs.

Although men dominated other tasks in the care of secondary living areas and the provision of transportation, they simply continued an already established pre-retirement pattern.

The chi square values on the managerial tasks in Table 16 support the hypothesized pattern of significantly increased involvement for husbands and a complementary (although not perfectly corresponding) pattern of decreased work by wives.

In this study, couples did not report a pattern of increased post retirement involvement for men in the functional areas of finances, marital and family relations, social-community, and health. In this study women were working in the labor force more than their husbands. This may be partially explained by age differences and the criterion of male retirement for inclusion in the sample. Women may enter the labor force upon their husbands' retirement to supplement the family income. Since husbands and wives did not report increased involvement in the marital and family relations area, two hypotheses of the study are rejected:

- (1) husbands and wives will increase their involvement in the interpersonal tasks related to maintaining or strengthening the marital relationship; and
- (2) wives will respond to their husbands' retirement by increasing supportive activities which facilitate his adjustments.



Table 16. Tasks in Which Men Increased Their Involvement After Retirement (Comparison of chi square values on total sample and split half group)

Functional Areas and Tasks	Total Sample*	Split Half	
	X <sup>2</sup>	X <sup>2</sup>	Significance Level
<u>Food</u>			
Shopping for groceries	31.97	19.90	.001
Storing food and other kitchen supplies	22.08	11.18	.01
Planning meals for nutrition and enjoyment	13.65	7.77	.05
Preparing and serving the food	18.22	9.27	.01
Setting and clearing the table	47.01	25.02	.001
Washing or drying dishes	37.49	16.29	.001
Disposal of waste, emptying garbage	24.25	20.50	.001
<u>Clothing, Linens, and Related Activities</u>			
Washing and drying clothes and linens	8.42	6.70	.05
Obtaining dry cleaning services	17.06	7.26	.05
<u>Yard, Garden, Secondary Living Areas, and Transportation</u>			
Mowing, raking, weeding, fertilizing lawn	13.69	9.28	.01
Maintaining flower beds and shrubs	20.35	13.67	.01
<u>Household Maintenance, Cleaning, and Related Activities</u>			
Sweeping, dusting, or vacuuming floors	46.17	27.57	.001
Major seasonal or annual housecleaning	46.86	18.72	.001
Making beds	30.18	24.71	.001

\*All of these statistics were significant at the .05 level or higher.

The couples in this study agreed on the increased responsibilities of retired husbands in selected managerial tasks. But the basic pattern is not changed for the majority of couples. Stability and continuity was the basic pattern in the division of labor during the post retirement years. Imposed upon this basically stable arrangement was a selective overlay of changes, especially in the daily or weekly activities in the areas of food, housecleaning, yardwork, and cleaning clothes. The allocation of more than three-fourths of the 63 managerial tasks studied thus remained divided between husbands and wives as in the preretirement pattern, while only about one-fourth were characterized by change. These findings substantiated the hypothesis that:

despite changes in who accomplishes selected managerial tasks after retirement, there will also be an underlying pattern of stability and continuity from the preretirement period.

### Dominance of the Different Types of Tasks

While the previous summary divided labor according to functional areas of home management, the following analysis focuses on the four types of managerial tasks discussed in the theoretical framework. The four types included:

- (1) routine tasks were characterized by single operations, physical labor, mechanical processing and preestablished patterns that were followed routinely;

- (2) complex managerial tasks involved decision-making, technical skill, sequential activities, or an element of study, supervision or service;
- (3) transactional tasks were complex tasks which link the family as consumer with other units of the community providing goods or services, and
- (4) interpersonal tasks were those which have social and psychological consequences in maintaining or strengthening marriage, family, and social relationships.

These four types were not mutually exclusive but differed significantly in the complexity, purpose, and requirements for the people involved.

The findings were based on the statements from the total sample regarding who accomplished the 63 tasks in the respondents' households. Points for equally shared tasks were evenly distributed between spouses on the scoring of dominance.

Dominance scores for all couples were arrived at by subtracting the lowest from the highest, leaving the balance as the sum of dominance for the appropriate spouse. For example, on the item of planning meals, if husband and wife responded in this way:

	Tasks accomplished by			
	Husband	Wife	Equal	Total
Husband's responses	2	84	16	102
Wife's responses	$\frac{3}{5}$	$\frac{89}{173}$	$\frac{10}{26}$	$\frac{102}{204}$

The scoring pattern was:

$$\text{Husbands} \quad 5 + 13^* = 18$$

$$\text{Wives} \quad 173 + 13 = 186$$

\*The number 13 is derived by dividing the total (26) from the "Equal" column in half. Husbands and wives each receive one half of a point on tasks equally shared. Wives dominated the task of planning meals by 168 points ( $186 - 18 = 168$ ) out of a possible 204.

One frequently hears the remark that "housewives never retire." The findings suggest that there may be two who "never retire" in most households. It appears that the potential shock of retirement from gainful employment in the labor force for men may be softened by extensive work at home before retirement and the increase of involvement after retirement. The wives of these retired men dominated in only 53.6 percent of the tasks. Husbands were reported as doing 46.4 percent of all the tasks, indicating a more even numerical division than anticipated. The observation of Peterson (1956) who reported a shift from patriarchal to equalitarian family appears to apply even to the oldest generation in our society.

There was a slight dominance of women in the majority of tasks which suggested a pattern of female control of leadership in household and family affairs (wives, 110; husbands, 94). However, this finding was not statistically significant. These data pertained to only one of the complex managerial tasks in the area of marital

and family relations. The task was phrased as "assuming leadership in household and family affairs." The perceptions of husbands and wives differed slightly on the matter of leadership. More men claimed an equal leadership role while more women suggested that their husbands were the leaders. Only six men in comparison to 18 women designated men as the leaders.

This research provided some clarification on the integration and the equivalency of status for husbands in household and family activities. From comments to the investigator of a few older women in senior citizen organizations, the husbands' involvement after retirement is more like a domineering invasion producing frustration and conflict. This has been the basis for many stereotypes and popular generalizations about older couples. Some older women have implied that they tolerate their husbands as long as they remain a casual nuisance and avoid being a menace. These points of view provide only a nominal, second-rate, or inferior status for retired men in the household. Delegation of simple tasks, an uneasy "apronship," and painfully close supervision may result.

The analysis of the four types of managerial tasks clearly indicates that these retired men were not functioning in their households primarily as assistants on the simple chores. Table 17 shows that they were working proportionately more on the complex than the routine tasks. In fact, husbands apparently experienced a status

more equal to their wives in complex managerial tasks than in any other classification. However, the "husband more-wife less" pattern of involvement was higher on routine than complex managerial tasks, 50 to 32 percent, respectively. Thus, men were more involved in complex tasks before retirement.

Table 17. Analysis of Husband and Wife Dominance over Different Types of Tasks

Types of Tasks	No. of tasks	Husband		Wife		Horizontal Totals
		N	%	N	%	
Complex managerial	(20)	1670	49.0	1741	51.0	3411
Routine managerial	(13)	934	34.5	1555	62.5	2489
Transactional	(19)	1884	53.2	1657	46.8	3541
Interpersonal	(11)	897	41.5	1268	58.5	2165
Totals	(63)	5385	46.4	6221	53.6	11,606*

\*Excludes tasks assigned to others or not applicable.

Wives clearly dominated in the area of routine tasks, while retired husbands engaged in the transactional tasks of management proportionately more than in the other areas. These tasks may have been more challenging to men since they involved decision-making, implementation, and liaison with other agencies of the community. This pattern of male dominance in transactional tasks may have related directly to the instrumental, liaison functions of husbands prior to retirement.

Only in the area of interpersonal tasks were over half (six) of the items equally shared, that is, without domination by either spouse. However, wives still dominated all of the five remaining items, with a resultant 58.5 percent of the possible points in interpersonal tasks. Tasks in the areas of marital relationships and visiting children were equally shared, while women surpassed the men in writing and calling, planning special family events, neighboring, and social activities.

Previous data analyses have emphasized continuity and increased involvement in home managerial tasks after retirement. This investigation has indicated that the proportion of increased involvement in various managerial tasks was almost balanced by decreased involvement (10.4 percent and 9.4 percent respectively). Relief from the demands of certain tasks was more apparent for women, since 12.2 percent reported less involvement, in contrast to 6.7 percent for men. Almost twice as many husbands as wives reported being more involved in home managerial tasks after retirement, 13.4 percent and 7.4 percent respectively. Wives decreased their involvement while husbands increased their involvement in routine and complex managerial tasks. These findings are documented in Table 18.

The data also indicated that complex managerial and transactional tasks were assigned to someone other than the couple more

Table 18. Average Percentages of Change and Stability in Involvement by Men and Women in Different Types of Tasks

MEN						
Types of Tasks	No. of Tasks	Less %	Same %	More %	Other %	Total %
Complex Managerial	(20)	6.4	69.6	13.5	10.5	100
Routine Managerial	(13)	4.5	70.1	21.9	3.5	100
Transactional	(19)	7.9	76.3	10.3	5.5	100
Interpersonal	(11)	<u>7.5</u>	<u>84.0</u>	<u>8.0</u>	<u>.5</u>	<u>100</u>
(Average)		6.7	74.3	13.4	5.6	---
WOMEN						
Types of Tasks	No. of Tasks	Less %	Same %	More %	Other %	Total %
Complex Managerial	(20)	13.0	71.1	7.3	8.6	100
Routine Managerial	(13)	16.4	73.2	7.8	2.6	100
Transactional	(19)	10.5	77.3	6.5	5.7	100
Interpersonal	(11)	<u>8.2</u>	<u>80.8</u>	<u>8.8</u>	<u>2.2</u>	<u>100</u>
(Average)		12.2	75.1	7.4	5.3	---
GRAND TOTAL OF MEN AND WOMEN						
Types of Tasks	No. of Tasks	Less %	Same %	More %	Other %	Total %
Complex Managerial	(20)	9.8	70.3	10.5	9.4	100
Routine Managerial	(13)	10.4	71.7	14.8	3.1	100
Transactional	(19)	9.4	76.8	8.4	5.4	100
Interpersonal	(11)	<u>8.0</u>	<u>81.9</u>	<u>8.4</u>	<u>1.7</u>	<u>100</u>
(Average)		9.4	74.6	10.4	5.6	---



often than routine or interpersonal tasks (combined totals of 430 vs. 60).

Table 18 presents a summary of each of the answers to the question of who accomplished the 63 managerial tasks in the study. The percentages of couples still involved in all of the tasks in each functional area are shown in Table 19.

Table 19. Percentage of Couples Still Accomplishing the Managerial Tasks in Each Functional Area

Task	Percent	Task	Percent
Food	99.6	Yard, Garden, and	
Marital-Family Relations	98.1	Secondary Living	
Clothing	97.6	Areas	86.8
Health	88.2	Financial Resources	83.9
Household Maintenance	88.0	Social-Community	74.0

These percentages are based on the combined data for husbands and wives and include an average of responses to all of the items within each functional area.

The greatest continued involvement was reported in the areas of food, marital-family relations, and clothing. The 21 tasks in which the retired couples were least involved are shown in Table 20. One-third (21) of the 63 tasks are reported. Approximately 90 percent or more of the respondents were still involved in the remaining two-thirds of the tasks.

Table 20. Twenty-One Managerial Tasks Most Frequently Assigned to Others or Not Applicable in the Couples' Households

	Percentages		
	Other	DNA	Total
1. Preparing the monthly and/or annual budget	0.0	49.5	49.5
2. Earning money through gainful employment	0.5	45.6	46.1
3. Engaging in regular recreation; sports, etc.	0.5	37.7	38.2
4. Figuring annual federal and state income taxes	33.8	3.9	37.7
5. Making goods of economic value for the home or couple	0.5	31.4	31.9
6. Engaging in volunteer, charitable, or community service work	0.5	27.9	28.4
7. Promoting and engaging in routine physical exercise	1.0	25.0	26.0
8. Painting inside walls, cabinets, trim, etc.	16.7	6.9	23.6
9. Planting, watering, weeding, and harvesting vegetables, berries, nuts, etc.	2.9	18.1	21.0
10. Repair of house, furniture, and appliances	18.1	2.0	20.1
11. Mowing, raking, weeding, and fertilizing lawn	10.8	8.3	19.1
12. Handling and storing screens, lawn furniture, etc.	5.4	10.8	16.2
13. Encouraging and participating in hobbies and avocational activities	0.0	14.2	14.2
14. Study of government programs related to personal and family finances	0.0	14.2	14.2
15. Initiating and participating in social activities	0.5	13.2	13.7
16. Major seasonal or annual housecleaning	8.3	3.9	12.2
17. Cleaning garage, basement, tool shed, work bench, and outdoor service areas	4.4	6.9	11.3
18. Encouraging and participating in religious and church related activities	0.5	10.8	11.3
19. Obtaining maintenance, servicing, and repairs for the car	3.4	7.8	11.2
20. Care of indoor plants or house pets	1.0	9.8	10.8
21. Deciding on hospital, nursing home, or other facility necessary	1.0	9.8	10.8

### Satisfaction and Stability in the Division of Responsibilities

Ninety-five percent of the respondents said they had reached a workable division of responsibilities and sharing of activities. Five percent of the respondents said they had not accomplished this at the time of the interview. However, on another question, 12 percent indicated that they were dissatisfied with their present arrangements. The remaining 88 percent reported being satisfied with their pattern of work and activities. The patterns established were considered to be stable by 90 percent of the respondents. According to chi square tests, the differences between men and women on the division of responsibilities and satisfaction with the present arrangements were not statistically significant. Table 21 indicates that over half did not require any time after retirement to develop a new pattern and stability. This seems to imply that little or no change was essential, or that is was carefully planned and accomplished.

Table 21. Months Required after Retirement to Develop Stable Patterns of Household Work and Activities

	Men		Women	
	N = 102	Percent	N = 102	Percent
No Time Required	58	57	54	53
1 to 6 Months	28	27	27	26
7 or More Months	12	12	19	19
No Information	4	4	2	2
	102	100	102	100

The wives of retired men in this study did not verbally support the stereotype of frustrated women begrudgingly giving up their domain to invading husbands. Ninety percent said they had not felt reluctant to give responsibilities to their husbands. The other 10 percent were reluctant to give up cooking, cleaning, financial, and shopping tasks. Both wives and husbands were asked whether they felt they were interfering with, disrupting, or taking over certain functions of their companion. Only three men and six women stated they were disrupting their mates on certain tasks. These data support the hypothesis that:

wives will not report the husbands' retirement as a major adjustment problem.

#### Relationship Between Husband-Wife Disagreement on Task Accomplishment and Other Variables

This study was designed to obtain independent responses of husbands and wives on who accomplished the 63 tasks. One purpose of separate interviews with husbands and wives was to determine the similarity of responses and to assess how different levels of agreement and disagreement were between the spouses. The figures on disagreement were determined by comparing answers of each husband and wife on who accomplished the various managerial tasks in their household. There were five possible answers on each task: wife, husband, both, someone else, and does not apply. Low,

average, and high were arbitrarily determined to place approximately one-third of the couples in each category. Ten was the lowest number of disagreements between any couple on the 63 tasks. Placement in the low, average, or high category was based on the number of times a couple disagreed. It was hypothesized that:

disagreement between husbands and wives on who accomplished the managerial tasks will be negatively associated with levels of satisfaction and perceived managerial competence.

The range of disagreements on the question of who accomplished each of the 63 tasks and the percentage of respondents at each level are shown in Table 22.

Table 22. Range of the Number of Disagreements between Couples on Task Accomplishment

	Number of Disagreements	Percent (N=102)
Low	10 - 19	32
Average	20 - 24	40
High	25 - 36	28

Comparisons were prepared between disagreement, as distributed in these three groups, and the following variables: (1) satisfaction; (2) managerial competence; (3) length of retirement; (4) income; (5) health; (6) quality of task performance; (7) anomia; and (8) the items pertaining to human resource assessment in perceived

managerial competence. On the basis of the results of chi square tests the following hypothesis was rejected:

disagreement between husbands and wives on who accomplished the managerial tasks will be negatively associated with levels of satisfaction and perceived managerial competence.

#### The Relationship of More Involvement by Husbands to Selected Variables

The 102 men were divided into three groups of approximately equal size according to the number of tasks in which they became more involved after retirement. The highest level of increased involvement was found to be positively associated with a low quality rating on task performance. Of those who increased their involvement in managerial tasks the most, one-half of them rated the quality of performance on those tasks at the lowest level. Only one-fourth of the men who increased their task involvement at the minimal and moderate levels rated the quality of task performance at the lowest level. The hypothesis is accepted as proposed that:

increased involvement by men after retirement in home managerial tasks will be associated negatively with ratings on the quality of task performance.

The second finding, more difficult to interpret, involved the factor in the managerial competence scale of being aware of and providing recognition and support for others in the household. Those who increased involvement the most and moderately, rated

themselves lower on this factor than did those with minimal change. Further research is needed to follow this potential clue and to determine implications of changed involvement and patterns of task allocation in retirement.

The third statistically significant relationship was identified between the length of retirement and increased involvement in managerial tasks. Those reporting the greatest increase in involvement had been retired for fewer than seven years. More than half of those retired for seven or more years were in the groups which increased their involvement in managerial tasks at the moderate or minimal levels.

#### Factors Contributing to Changes of Involvement in and Accomplishment of Managerial Tasks

The assessment of managerial task changes was followed in the interview schedule with a list of 16 factors which may have contributed to these changes in various home and family responsibilities after retirement. The factors required a yes or no response. More than 50 percent of the respondents answered affirmatively on the first eight factors listed in Table 23.

Three major factors for increased post-retirement involvement in managerial tasks were (1) sharing responsibilities to avoid imbalances in the division of work and free time and to enhance the

Table 23. Factors Reported Which Increased Involvement in Managerial Tasks after Retirement

Factor	Total		Men		Women	
	N=204	%	N=102	%	N=102	%
1. To do my share around the house	139	68.1	79	77.5	60	58.8
2. More time for involvement	134	65.7	83	81.4	51	50.0
3. To maintain a satisfying and stable marriage	134	65.7	73	71.6	61	59.8
4. To feel useful	132	64.7	72	70.5	60	58.8
5. To relieve my companion from excessive work	118	57.8	73	71.6	45	44.1
6. To achieve a sense of accomplishment	115	56.4	62	60.8	53	52.0
7. To maintain mental health	110	53.9	55	53.9	55	53.9
8. To maintain or improve physical health	108	52.9	56	54.9	52	51.0
9. Have become more interested	91	44.6	52	51.0	39	38.2
10. Poor health of spouse	67	32.8	24	23.5	43	42.2
11. Increased need for a well planned budget	67	32.8	31	30.4	36	35.3
12. So children or others will not worry	64	31.4	36	35.3	28	27.5
13. To reduce boredom	63	30.9	41	40.2	22	21.6
14. My spouse delegated new or more responsibilities to me	54	26.5	35	34.3	19	18.6
15. To make up for a previous lack of involvement	38	18.6	20	19.6	18	17.6
16. To quit thinking so much about my previous occupation	31	15.2	23	22.5	8	7.8



marital relationship; (2) achieving a sense of usefulness and accomplishment in the performance of tasks that are essential and rewarding; and (3) maintaining physical and mental health. More women than men reported that poor health of their spouse contributed to increased involvement in managerial tasks. The only other variable on which more women responded affirmatively was an increased need for a well planned budget. However, the differences between men and women were not statistically significant.

Chi square tests showed that significantly more women than men gave the following reasons for their reduced involvement: (1) having less time for the activities; (2) assigning the activities to their spouses, and (3) improvement in their spouses' health and capability to assume more responsibility. One of two major reasons for decreased involvement reported by 70, or 34 percent of the respondents, was declining physical health, sickness, or disability. A second explanation reported by 76, or 37 percent of the respondents, was that they got along better with their spouses when they did not get too involved in the managerial tasks of the household.

#### The Influence of Illness and Disability on Managerial Tasks

The sample of 102 couples was divided into three groups according to the combined number of illnesses and disabilities of each couple. They were distributed as follows for this analysis.

Table 24. The Number of Illnesses and Disabilities Per Couple

Number of Illnesses and Disabilities	Number of Couples	Percent
2 or less	26	25.5
3 to 7	47	46.1
8 or more	29	28.4
	102	100.0

Cross tabulations were prepared on the 63 managerial tasks to determine if and how illness and disability affected the allocation of tasks and changes of involvement after retirement. The number of tables (126) is double the number of tasks (63) because of the two questions: (1) who accomplishes the task in this household and (2) how much are you now involved in comparison to before (you or your husband) retired? The chi square test was applied to each of the 126 tabulations. The level of illness and disability was significantly related to the accomplishment of only five of the 63 tasks (Table 25). The level of illness and disability was significantly related to changes of involvement on nine of the tasks, as shown in Table 26. The chi square values and levels of significance for tasks affected by illness and disability are summarized in Tables 25 and 26.

Table 25. Changes in Task Accomplishment by Husbands and Wives as a Result of Illness and Disability

	$X^2$	Significance Level
1. Washing or Drying Dishes <u>Type of Change</u> --Husbands did more dishes as illness and disability increased.	11.40	.05
2. Major Seasonal or Annual Housecleaning <u>Type of Change</u> --Husbands did more seasonal and annual cleaning as illness and disability increased.	18.90	.02
3. Study, Decision, and Purchase of Car, Fire, Liability, and Other Property Insurance <u>Type of Change</u> --Husbands and wives shared this task more as illness and disability increased.	11.35	.05
4. Encouraging and Participating in Religious and Church Related Activities <u>Type of Change</u> --Husbands were less involved as illness and disability increased.	14.91	.05
5. Engaging in Volunteer, Charitable or Community Service Work <u>Type of Change</u> --Joint participation declined and was replaced by individual participation as illness and disability increased.	15.35	.05

Table 26. Changes in Task Involvement by Husbands and Wives as a Result of Illness and Disability

	$\chi^2$	Significance Level
1. Planning Meals and Menus for Nutrition and Enjoyment <u>Type of Change</u> --Husbands more involved with most and least illness and disability.	11.24	.05
2. Setting and Clearing Dishes from Table <u>Type of Change</u> --Husbands more involved with most and least illness and disability.	8.60	.05
3. Ironing <u>Type of Change</u> --Husbands more involved as illness and disability increased.	13.29	.05
4. Folding and Storing Clothes and Linens <u>Type of Change</u> --Husbands more involved as illness and disability increased.	8.45	.05
5. Driving the Car and Chauffering <u>Type of Change</u> --Husbands less involved as illness and disability increased.	13.61	.05
6. Paying the Bills <u>Type of Change</u> --Husbands more involved as illness and disability increased.	12.07	.01
7. Encouraging and Participating in Hobbies and Avocational Activities <u>Type of Change</u> --This task was less applicable for couples who reported the highest level of illness and disability.	13.01	.05
8. Encouraging and Obtaining Regular Physical Examination <u>Type of Change</u> --As illness and disability increased, the proportion of husbands and wives increased who reported the same level of involvement with the task before retirement.	16.30	.05
9. Using or Supervising the Use of Prescribed Drugs <u>Type of Change</u> --Husbands and wives more involved as illness and disability increased.	14.86	.05

The main finding was that men increased their involvement in two-thirds of the above managerial tasks which were found to be significantly related to levels of illness and disability. Driving the car was the primary exception in which men were less involved as health declined. These data have not supported the hypothesis that:

poor health will result in less involvement in the managerial tasks of the household.

### Relationship Between Educational Levels and Managerial Tasks

Formal education constitutes one of the major independent variables in this investigation. The primary question was whether variations in the years of school completed were associated with those who accomplished various managerial tasks. Was higher education related to a more specialized division of work in the home? In which functional areas did the level of education make a difference in the allocation of tasks? The respondents were divided into the four educational levels shown in Table 27. Cross tabulations were prepared on each of the managerial tasks.

Table 27. Years of School Completed by Respondents

Years of School Completed	Number	Percent
1 - 8	37	18.1
9 - 12	60	29.4
13 - 16	69	33.9
17 or more	38	18.6
	<u>204</u>	<u>100.0</u>

The application of chi square tests showed that 17 of the 63 managerial tasks were significantly related to levels of education.

These findings support the hypothesis that:

differences in educational background and health conditions are expected to influence the distribution of managerial tasks in the family.

The findings on education and managerial tasks are first discussed as they related to functional areas. Five of these 17 tasks, characterized by changes in involvement and related to educational differences, were in food management. Educational differences were not related to any tasks in the area of clothing or maintenance of the yard and garden. The numbers of tasks in six other functional areas, which were significantly related to educational differences, are shown in Table 28.

Table 28. Number of Tasks in Functional Areas Which Were Significantly Related to Educational Differences

Functional Area	Number	Percent
Food (7)	5	71
Household Maintenance (19)	3	50
Health (8)	3	37
Financial Resources (13)	4	30
Marital-Family Relations (7)	1	14
Social-Community (9)	1	11

### Educational Differences in Relation to Specific Tasks

A direct linear relationship existed between the level of education and writing letters or calling children. Men and women with the least education reported that this task was done more by women.

Table 29 shows who did this task.

Table 29. The Relationship of Educational Differences to Writing Letters and Calling Children or Grandchildren

Years of School Completed Total (N = 204)	Task			Total %
	Wife Only %	Accomplished By Sharing %	Husband Only %	
1 - 8 (N=37)	81.1	13.5	5.4	100
9 -12(N=58)	69.0	24.1	6.9	100
13 -16(N=69)	65.7	25.4	9.0	100
17 or more (N=37)	48.6	43.2	8.1	100
No information (N=3)				

The proportion of husbands writing letters did not change substantially with higher education, although the proportion who shared this task with their wives increased with each level of education.

The task of figuring federal and state income taxes was significantly related to educational differences. Almost three-fourths of those with college and graduate school educations in comparison with less than one-fourth with elementary or high school background

reported that husbands performed this task. Those with elementary and high school education more frequently reported that someone other than either the husband or wife figured income taxes. About twice as many women at the elementary and high school levels, in comparison to those with college and graduate education, figured income taxes. Involvement changes brought about by the husbands' retirement were also related to educational differences. Those with the most education reported the least change in who figured the taxes.

According to chi square tests, significantly more husbands with college and graduate school education than elementary or high school education maintained household records on income and expenses. The greatest difference was reported in the pattern of sharing on the maintenance of records on income and expenses. Significantly more husbands and wives with an elementary or high school background did this task jointly than did the couples with advanced education. Significantly more of the husbands with college and graduate education than those with elementary or high school education, made business phone calls and wrote letters, cashed checks and made bank deposits, and earned money through gainful employment.

Nineteen percent more of the husbands and wives with college and graduate school educations were engaged in volunteer, charitable, or community service work than were those with less education.



Decreased involvement in community activities after retirement was the least characteristic of those with a graduate school education. Reduction of involvement was reported by 30 percent of the respondents at the elementary, high school, and college levels, but by only 9 percent of those with graduate education.

All respondents at the highest educational level considered participation in hobbies and avocational activities relevant to them. One in five at the three lower educational levels said that hobbies and avocational activities were not applicable to them. One in four of the total sample reported more involvement in these activities after the husband's retirement.

Engaging in regular recreation and sports was positively correlated with education. One-third with college and graduate school background in comparison to one-sixth with less education increased involvement in routine physical exercise. Approximately three-fourths of the husbands and wives in the four educational groups equally shared in the responsibilities of guiding health and hygienic practices and choosing health care facilities.

Findings indicate that educational differences were associated more with the accomplishment of complex managerial and transactional tasks than routine or interpersonal tasks. Educational differences were significantly related to the accomplishment of 31 percent of the complex and transactional tasks but to only 12 percent of the

routine and interpersonal tasks.

### Measurement of Perceived Managerial Competence and Correlated Factors

One of the primary objectives of this investigation was to assess perceptions of managerial competence. Respondents were asked to think of competence in relation to the responsibilities and activities of the home, their marriage, and the family rather than to professional, political, business, or other activities. Respondents rated themselves on a low-high scale of one to five points on 25 items which were designed to measure perceived managerial competence. Managerial competence, as used in this study, is the ability to identify, obtain, and utilize human and material resources to accomplish tasks and achieve goals.

Six components were identified as the major divisions for the measurement of competence in home management. The components included: (1) values, standards, and priorities; (2) collecting and analyzing information; (3) planning and decision-making; (4) assessing and utilizing human resources; (5) implementing and co-ordinating resources and activities; and (6) evaluating, adapting, and redirecting decisions and actions. The components and individual items are listed in Appendix E, p. 198.

Respondents were divided into three groups of approximately one-third each on the basis of high, average, and low scores.

Placement within a group was based on the total score, which was derived from ratings on the 25 managerial competency items. The proportion of respondents in each group is shown in Table 30.

Table 30. Distribution of Respondents According to Perceived Managerial Competence Scores

	Range of Scores	Number	Percent
Low	( 27-96 )	68	33.3
Average	( 97-111)	71	34.8
High	(112-125)	<u>65</u>	<u>31.9</u>
		204	100.0

The scale of 25 items does not appear to have a masculine or feminine bias, since there were no statistically significant overall differences between the responses of men and women. The variation between the proportion of men and women at each level (high, average, and low) of managerial competence ranged from 1 to 6 percent.

The occupational rating from the North-Hatt scale, the length of retirement, and social anomia as measured by a scale prepared by Mizruchi (1960), were not significantly related to perceived managerial competence. The husbands' occupational ratings on the North-Hatt scale were not correlated with their home managerial competence scores. If the variables of occupation and perceived managerial competence were in a positive linear relationship, it

may have been difficult to determine which was being measured.

The same evaluation may be applied to education since no patterned relationship was identifiable in the general cross tabulations between the four educational levels and the three classifications of managerial competence. However, when respondents with an elementary and secondary education were compared with those of college and graduate education, a statistically significant difference emerged. Sixty-two percent of those with higher educational experience (in comparison to 38 percent with elementary and high school background) were in the highest and middle levels of perceived managerial competence.

Perceptions of managerial competence did not differ significantly between groups of people retired one to three years, three to six years, and seven or more years.

It was hypothesized that:

perceived managerial competence will be associated positively with income, net worth, and ratings of life satisfaction.

These and other factors shown in Table 31 were studied in relation to the levels of perceived managerial competence. Those factors which were significantly related to perceived managerial competence are shown in Table 31.

Table 31. Factors Associated with Perceived Managerial Competence

Ratings	$X^2$	Significance Level
1. Self image	68.75	.001
2. Ratings on the overall accomplishment of tasks in the eight functional areas of management	48.50	.001
3. Overall rating of satisfaction with major factors in their present situation	43.78	.001
4. Years married	21.32	.01
5. Income from all sources during 1966	17.33	.01
6. Number of illnesses and disabilities reported by couples	9.59	.05
7. Summary of activities in preparation for retirement	7.78	.01
8. Education	6.33	.05
9. Net worth	3.94	.05

Self image scores were associated positively with the perceptions of managerial competence. Items used to measure self image are shown in Appendix A, p. 181. Table 32 indicates the positive relationship between the self image and perceived managerial competency variables.

Table 32. The Relationship Between Self Image and Perceived Managerial Competence

Managerial Competence (Number of Respondents)	Self Image Scores					
	Low (19-28)		Average (29-32)		High (33-35)	
	N	%	N	%	N	%
Low (68)	39	57	24	40	5	7
Average (71)	23	33	26	43	22	37
High (65)	<u>7</u>	<u>10</u>	<u>10</u>	<u>17</u>	<u>48</u>	<u>56</u>
	69	100	60	100	75	100

There was a positive relationship between ratings on accomplishment of tasks in the eight functional areas studied and perceptions of competence. This association should not be considered as a simple measurement of the same phenomena, since the linkage is reasonably complex, the items completely different, and the batteries of items separate in the interview. Respondents who perceived themselves as competent home managers confirmed or reinforced this position with high ratings on their accomplishments in the functional areas of management.

One of the hypotheses verified by the data was that:

the perception of managerial competence would relate positively to satisfaction with different aspects of life.

The factors in the assessment of satisfaction included: housing and furnishings, recreation, work, neighborhood, religion, government,

social and family relations, married life, community services, financial resources, physical and mental health, transportation, use of time, and available energy.

Table 33 shows the positive relationship between perceived managerial competence and life satisfaction.

Table 33. The Relationship Between Perceived Managerial Competence and Satisfaction

<u>Competence</u>		<u>Satisfaction</u>			Total %
	N = 204	High %	Average %	Low %	
High	(68)	54	31	15	100
Average	(71)	28	47	25	100
Low	(65)	12	29	58	100

Over three-fourths of the couples married more than 40 years perceived themselves at the highest level of managerial competence, compared with only 22 percent of those married 40 years or less. This positive relationship between managerial competence and length of marriage also holds for those with average competence scores (Table 34).

Table 34. The Relationship Between Perceived Competence and Length of Marriage

Perceived Competence	N = 102	Length of Marriage			
		1 - 40 years		41 or more	
		N	%	N	%
High	(32)	7	22	25	78
Average	(36)	12	33	24	67
Low	(34)	17	50	17	50

Managerial competence related significantly to satisfaction and income in this investigation. Data are presented in Table 35 on the relationship between income and perceived managerial competence.

Table 35. The Relationship Between Perceived Managerial Competence and Income (men only)

Perceived Competence	N = 102	Income			
		\$0 - 4,999		\$5,000 and over	
		N	%	N	%
High	(32)	16	50	16	50
Average	(36)	11	30	25	69
Low	(34)	24	71	10	29

Seven of ten who rated themselves with the least managerial competence had the lowest incomes.

Net worth was also found to be positively related to perceived managerial competence. Sixty-five percent of those with the highest



and average competency scores, in comparison to 44 percent at the lowest competency level, had a net worth of \$30,000 or more. Over half (56 percent) of the respondents with the lowest competency scores had a net worth of less than \$30,000 (Table 36).

Table 36. The Relationship Between Perceived Managerial Competence and Net Worth

Perceived Managerial Competence	Net Worth	
	\$0 - 29,999 %	\$30,000+ %
High and Average (N = 68)	35	65
Low (N = 34)	56	44

The high and average groups were combined for this tabulation to determine if there was any significant relationship between the two variables of income and perceived managerial competence. The first tabulation did not combine the high and average groups, and was not statistically significant.

The relationship between the combined illnesses and disabilities of husbands and wives and managerial competence was not consistent. The majority of those at the middle level of managerial competence had an average number (4.2) of illnesses and disabilities. Those reporting low managerial competence had the highest average number (5.7) of health problems. Those with the highest managerial competence scores were not the most free from health problems, since one-third

had eight or more and one-half had from three to seven illnesses and disabilities.

Perceived managerial competence appeared to be associated positively with preparations for retirement. The most extensive preparations for retirement were made by those who obtained the highest managerial competence scores. Those with average and low management scores were almost equally distributed in the three levels of preparations for retirement.

#### Relationship of Components of Perceived Competence to Independent Variables

During the planning stage of the research, the investigator considered that low, medium, and high scores on the various components of perceived managerial competence investigated would be differentially related to the major independent variables of the study --sex, education, occupation, age, illness, income, and satisfaction. Cross tabulations and chi square tests refuted the assumed differential relationship on all but the variable of satisfaction. There was a positive linear correlation between each of the six components of perceived competence and satisfaction. (See Appendix E for the listing of components). All of the percentages within each component followed a similar pattern of high competence-high satisfaction, moderate competence-moderate satisfaction and low competence-low satisfaction.

### Findings from the Correlation Matrix on Managerial Competency Items

A correlation matrix was prepared on the managerial competency items from the Corvallis data. This required a cross tabulation of 25 rows and an equal number of columns, yielding 600 correlations. The matrix provided a measurement of association between the average or mean scores of each item and all other items. It also facilitated comparisons of items within and among subgroups. The remaining discussion of this section is based on data from the correlation matrix. Correlations and mean scores and the range of correlations between items within subgroups are presented in Table 37. The single figure given under the correlation column in Table 37 is the correlation of average scores on all items within each component. The next column, on range of correlations, shows the lowest and highest correlations between any pair of items within the component.

The correlations are not high for the item-item measurements within each component, nor are the differences substantial between each component. However, they differ significantly from purely random relationships. Each item was designed to measure discrete and separate aspects of perceived managerial competence. This emphasis on an independent contribution by each item to the scale may have reduced the correlation values. If many items were highly

Table 37. Item Correlations Within Components on the Measurement of Perceived Managerial Competence

Component	Major Processes and Variables	Correlation (N = 204)	Range of Correlations Within Component
B	Collecting and Analyzing Information	.421	.378 - .469
F	Evaluating, Adapting, and Redirecting	.410	.355 - .460
A	Determinant Factors and Framework	.342	.261 - .458
C	Planning and Decision Making	.338	.235 - .475
D	Assessing Human Resources and Interpersonal Skills	.335	.204 - .484
E	Implementing and Co-ordinating	.326	.220 - .385

correlated most of the information could be elicited by a smaller number of representative items which have the highest intercorrelations.

#### Correlation of Components with All Other Variables

The mean of each item was correlated with the mean of all other items in the managerial competence scale. These correlations ranged from .493 to .758. They are averaged and ranked by components in Table 38.

Table 38. Correlations of the Components of Perceived Competency with the Overall Mean

Component	Major Processes and Variables	Average Correlation with Overall Mean (N = 204)	Range of Item Correlations With Overall Mean
B	Collecting and Analyzing Information	.653	.534 - .684
F	Evaluating, Adapting, and Redirecting	.653	.547 - .677
A	Determinant Factors and Framework	.621	.493 - .758
C	Planning and Decision-Making	.607	.544 - .641
E	Implementing and Co-ordinating	.607	.534 - .716
D	Assessing Human Resources and Interpersonal Skills	.584	.564 - .742

The correlations observed in this tabulation are higher because of the homogenizing effect of relating one score to 24 other varied scores instead of comparing a single item to another.

The correlations between components were transformed to z scores to test whether the correlations were different between the components. Six z scores were developed and three pairs of components (A-F, A-C, and D-E) were matched for this analysis. None of the comparisons were found to be significantly different.

Perceived Competency Items with Overall Mean Correlations  
in Upper and Lower Quartiles

The six items most highly correlated with the overall mean were distributed in five of the six components as shown in Table 39. (The major processes and variables of the subgroups are identified in the immediately preceding Table 38).

Table 39. The Six Highest Correlations Between Perceived Competency Items and the Overall Mean

Component		Correlation Value (N = 204)
C	1. Making appropriate and rewarding decisions.	.758
F	2. Evaluating how well tasks are accomplished.	.742
B	3. Obtaining, evaluating, and using ideas and suggestions of your companion, other family members, or friends.	.737
E	4. Maintaining time schedules, sequences of work, and other activities that are satisfactory to you and others.	.716
A	5. Deciding on what is most and least important, first and last, and establishing priorities.	.684
B	6. Identifying alternative choices or approaches to decisions or problems.	.677

Component D, which assesses human resources and interpersonal skills, was not represented among the items in the upper quarter even though it had seven items and a higher probability to be represented than any other component.

The factors with the lowest correlation values in relation to the overall mean are reported in Table 40. Three items from component D appear in the lowest quarter. The other four from this component were in the middle range of correlation values.

Table 40. The Seven Lowest Correlations Between Perceived Competency Items and the Overall Mean

Subgroup	Item	Correlation Value (N = 204)
C	1. Budgeting money, defined as the planned distribution of financial resources.	.493
E	2. Carrying out special plans, accomplishing non-routine tasks, and activities.	.534
A	3. Setting standards and guidelines for work and conditions of the house.	.534
C	4. Thinking about and planning for the future.	.542
D	5. Assigning, authorizing, and sharing the work.	.544
D	6. Providing leadership and guidance to family members.	.548
D	7. Awareness of and providing recognition for the efforts and supportiveness of others.	.548

Seven items were included in Table 40 because items six and seven had the same correlation value (.548). Authorizations for work, (item 5) between retired couples are probably extremely rare, if existing at all in most cases. Work assignments, (item 5) between older couples may also represent a serious over-formalization. Evidences of leadership or guidance, (item 6) may also be scanty, especially over long periods of time or under normal conditions. This concept is probably most apropos during periods of crisis, adjustment, or transition.

#### Dispersion of Responses on Managerial Competency

The standard deviations on the 25 items showed a range of dispersion from a low of .764 to a high of 1.382. The items with the widest dispersion were clustered from items 5 through 16 with less dispersion at the beginning and end of the series.

The 13 of the 25 questions eliciting the widest distribution of responses represented all components. Three of four items from the component on evaluating, adapting, and redirecting were among the questions with the greatest dispersion of answers. This was the highest proportion involved from a single component and may suggest an area for further development of discriminating items. The component least represented was on collecting and analyzing information. The questions which elicited the least variable response are ordered



in magnitude in Table 41.

Table 41. Perceived Competency Items with the Least Dispersion

	Standard Deviation (N = 204)
1. Flexibility to change or adapt to the unexpected or unusual.	.809
2. Being alert and responsive to the interests, needs, and problems of others.	.889
3. Obtaining, evaluating, and using ideas and suggestions of your companion, other family members, or friends.	.909
4. Awareness of and providing recognition for the efforts and supportiveness of others.	.920
5. Recognizing problems that exist, identifying the real issues, and analyzing different aspects of them.	.920

#### Results of Diagrammatic Analysis on Managerial Competency Items

While analyzing the interview schedules, it appeared that answers to certain questions were highly correlated with answers to questions which immediately preceded or followed the question under consideration. The items had been randomized according to the different components and the total battery in order to avoid content similarity in items adjacent to each other. However, it was observed that there might be a "carry-over" effect from certain items

to those which followed in the sequence. The last five items were of particular concern, since they evidently lacked differentiation among the responses.

In order to evaluate these items, a diagram was prepared, portraying the three items most highly correlated with each other (Figure 2). Data for the diagram was obtained from a correlation matrix which consisted of 600 correlations. Each correlation represented the degree of association between a pair of items measuring perceived managerial competence. For each question, it was determined which responses to other questions ranked as the first, second, and third highest correlations. A high correlation indicated a high degree of association between two variables. If there were no association between two variables, the correlation value would be zero. If the two variables were perfectly associated with each other, the correlation value would be one (1.0). For example, the correlation values derived between items (1) and all other items were as follows:

Item 1  
(Correlations)

<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>
---	.409	.167	.480*	.236	.322	.399	.457*	.402	.303	.475*	.441	.239
			(1st)							(2nd)		
<u>14</u>	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>	<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	
.186	.254	.180	.337	.269	.347	.359	.280	.188	.235	.221	.286	

\*The correlation between item 1 and item 4 was the highest (.480). The correlation was second highest on item 11 and third highest on item 8. The reader may note that these items are shown on the diagram. None of the other lower correlations between item 1 and the remaining 21 items are plotted on the diagram.

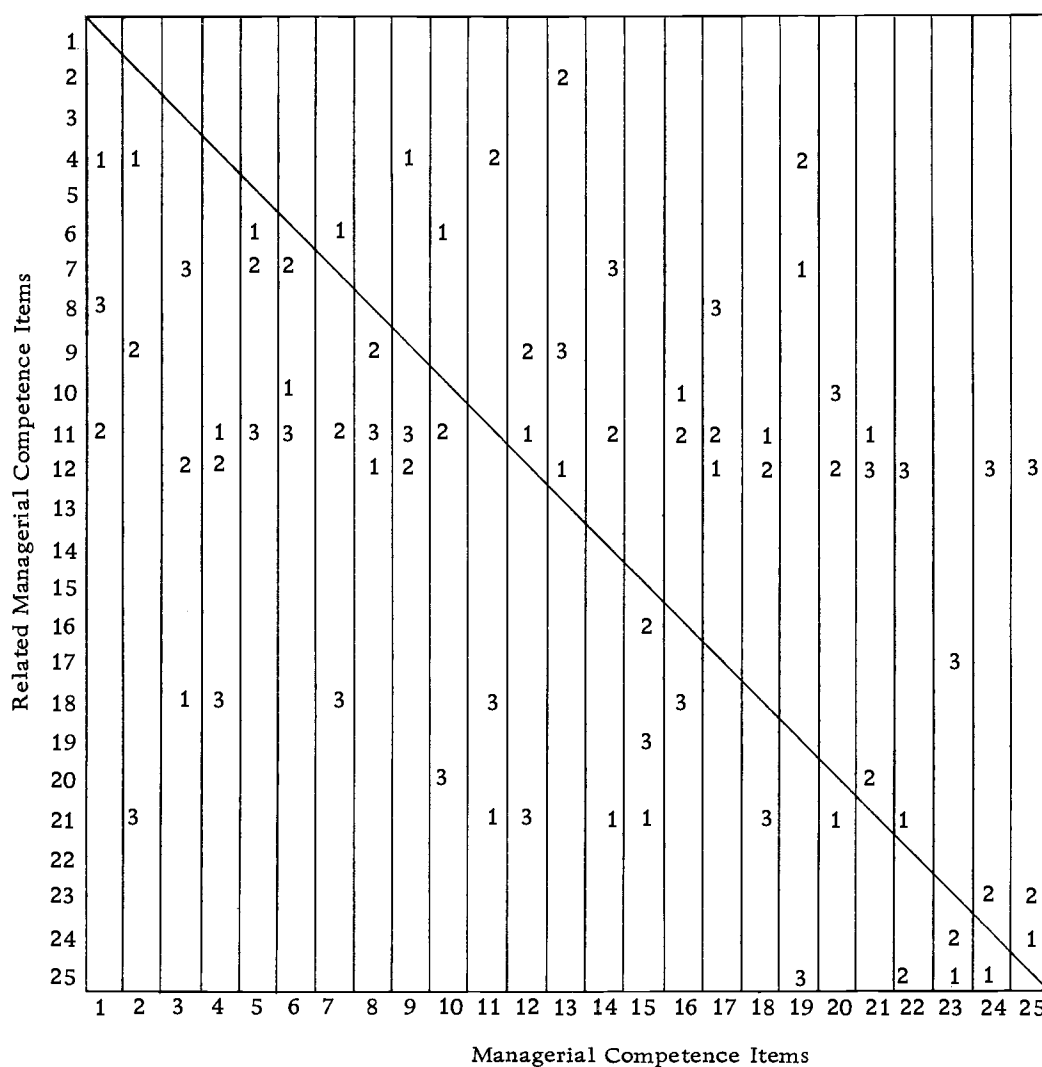


Figure 2. Diagrammatic Presentation of the Three Managerial Competence Items Most Highly Correlated with Each Other Managerial Competence Item. \*

\*The numbers (1, 2, 3) within the diagram should be read vertically because their primary reference is on the horizontal axis or base of the diagram.

The diagram provides support for the concern about a "carry-over" effect, particularly on the last three questions on managerial competence. The first and second correlations on all three of these items were from questions which closely preceded or followed the item. In other words, items 23, 24, and 25, were most highly correlated with each other as follows:

	Highest correlation with item	2nd highest correlation with item
23	25 (.512)	24 (.502)
24	25 (.541)	23 (.502)
25	24 (.541)	23 (.512)

It appears that it would be desirable in the future to intersperse the items on perceived managerial competence throughout the interview, rather than to cluster them all together.

The second major finding from the diagram was that two items in the scale (item 11 and 12) were very highly correlated with an unexpectedly large number of other items. These items were {11)

making appropriate and rewarding decisions, and {12)

obtaining, evaluating, and using ideas and suggestions of your companion, other family members, or friends.

Out of 75 possible first, second, or third level correlations, these two items accounted for 26, or over one-third of the possible total.

One or the other was correlated at the first, second, or third level with all but four of the other 23 items. Both were in the top three correlations on six other items. It is of interest that these six items

and the two items under consideration represented all of the components of managerial competence rather than a few of the components.

#### Comparison of Corvallis and Aurora Samples on Selected Variables

The focus of the research thus far has been on the analysis of Corvallis data to avoid some of the additional complications of separate samples, small frequencies in each cell in the tabulations, and interpretation of results for groups with different characteristics. This section provides an exploratory, comparative analysis of the responses of 102 couples from Corvallis and 15 couples from the village and rural area of Aurora. The hypothesis tested was that:

the rural and urban samples will differ significantly on demographic characteristics as well as the distribution and sharing of managerial tasks.

The Corvallis couples averaged four years older, had an additional 2.3 years of education, were married 4.5 years longer, had been retired about 3.5 months less, and had retired from a broader range of occupations and professions. Fifty-three percent of the men from Aurora and only 7 percent of the men from Corvallis were retired farm owner-operators. Twenty-five percent from Aurora and 9 percent from Corvallis were craftsmen. Aurora is a rural village with approximately 300 residents and Corvallis is a university community with a population of approximately 34,000.

Comparisons between the respondents from the two communities

were made on 37 of the 63 managerial tasks. The analysis excluded the functional areas of food, clothing, the yard, garden, and secondary living areas, and household maintenance, because of the limited financial resources available for data processing. The functional areas of financial resources, social-community, marital and family relations, and health were included.

The distribution of responses between interviewees from the two communities differed significantly on 14, or 38 percent of the 37 tasks. The four functional areas of home management included are listed according to the number of items that were significantly different: (1) health, 56 percent; (2) finances, 56 percent; (3) social-community, 33 percent; and (4) marital and family relations, 0 percent. On the basis of chi square analysis, over two-thirds of the transactional tasks, in comparison with one-half of the routine managerial and about one-fifth of the complex managerial and interpersonal tasks, were significantly different between the two communities.

#### The Accomplishment of Tasks in the Financial Resource Area

The six tasks which were statistically significant in the financial area will be considered first. Ninety percent of the Corvallis respondents invested in property and in stocks and bonds, while only 56 percent from Aurora did so. A higher percentage of wives in the

Aurora sample studied and made decisions to purchase life, hospital, and medical insurance than did wives in Corvallis, where that job was more often a joint accomplishment or handled by husbands alone. This may be related to the fact that Aurora women exceeded their husbands educationally by an average of 1.73 years or it could be more of a woman's job in the rural area.

Figuring annual federal and state income taxes was more frequently accomplished by Corvallis men in comparison with more sharing of this task by Aurora couples. In the preparation of monthly or annual budgets, the pattern of sharing again prevailed in Aurora, while husbands and wives accomplished this separately in Corvallis. This task was not done or "did not apply" in half or more of these households in both communities.

Making business phone calls and writing letters tended to be more the responsibility of the wife among the retired Aurora couples. Seventy percent of the Aurora women and 36 percent of the women from Corvallis did this task. Three and one-half times more men from Corvallis than Aurora reported that they placed business calls and wrote letters. Perhaps this is related to the bookkeeper and business manager activities of the rural wife or her higher level of education. More of the Aurora women also signed and cashed checks and made bank deposits.

In summary, according to chi square tests, there were no

significant differences between the respondents in the two communities on who accomplished 44 percent of the managerial tasks in the financial resources area. The major differences in the remaining 56 percent of the tasks were that in Corvallis, men were doing more of the financial work and making more investments and in Aurora, women were doing more financial tasks than their husbands or shared them on an equal basis.

#### Managerial Tasks in the Social-Community Area

Significant differences were found on three of nine tasks in the social-community area. Husbands in Corvallis and wives in Aurora reported more individual visiting than joint husband and wife visiting with their neighbors and friends. Approximately three-fourths of all respondents from both communities reported that they and their spouses visited equally with their neighbors and friends. Four in ten Aurora women compared with two in ten women from Corvallis reported that they encouraged and participated in religious and church related activities. None from Aurora, but one in ten from Corvallis, said that this task did not apply in their households. This could be related to the selection of respondents because the field supervisor from Aurora was a local minister who would have been more familiar with and may have obtained interviews from church members.



This difference of participation in religious organizations may also be related to the different educational and professional backgrounds of respondents from the two communities. The churches in rural areas may serve more exclusively as activity centers of the community. Twenty-eight percent in Corvallis and 7 percent in Aurora reported that they were not participating in religious organizations. Higher proportions of women and couples from Aurora said they engaged in voluntary, charitable, or community service work. Cities generally have more voluntary associations and formal organizations that carry on volunteer, charitable, and service work so that opportunities would probably be more available in Corvallis than in the village of Aurora.

#### Tasks Related to Health Maintenance

The pattern of responses differed between the rural and urban samples on five of the nine managerial tasks in the health area. One difference was that more of men and women in Corvallis were engaged in regular physical exercise and intellectual pursuits. Farm living entails a considerable amount of routine physical effort. Planned exercise may be the alternative for the city dweller.

The men in this study, particularly the older farmers and retired villagers were reluctant to obtain physical examinations and medical and dental care. Twice as many women as men from both

samples sought these health maintenance services on an individual basis. Only one man in comparison with 12 women from Aurora said they did the health maintenance tasks by themselves. A pattern of sharing on health related tasks was more characteristic of Corvallis couples, as reported by three-fourths of them and one-half of the couples from Aurora. Decisions about which hospital, nursing home, or other facility to enter for services were equally shared by more Corvallis couples. Women from Aurora were more involved individually in such decisions.

#### Preparations for Retirement

Significantly more couples from Corvallis reported participation in the three activities, including reading educational materials, taking definite financial steps, and making advance decisions about what to do and how to retire successfully. Factors which may account for these differences may include the availability of reading materials in the community, the provision of pension plans through the university and other government employers, and possible differences in the structure of retirement systems in urban and rural areas.

### Other Findings

The educational and occupational differences between the respondents of Corvallis and Aurora were statistically significant. Over one-half of the respondents from Corvallis, in comparison to one-fifth from Aurora, had attended college. Men from Aurora were not represented in the highest occupational rating category of the North-Hatt scale (scores 81 and over), and had fewer respondents at the second highest level (scores 70 to 80). The occupations and scores may be reviewed in Appendix G. The chi square analysis showed that retired Corvallis couples reported significantly more formal social participation in the five groups enumerated: (1) church-religious, (2) social-fraternal, (3) recreational-hobby, (4) professional-occupational, and (5) civic, community, and political. This included a summary of memberships, committee, and officer positions given different numerical weights of three, five, and seven respectively. Three levels of social participation were established by dividing the respondents into three groups of approximately equal size. Over one-half from Aurora and over one-fourth from Corvallis were in the lowest level of the social participation scores. This finding is probably related to several factors, including the number and type of such organizations in rural and urban communities, the socialization of individuals, organizational emphases in different

socio-economic strata, and the occupations and professions in rural and urban labor forces.

Respondents were asked if they wanted less, the same, or more contact with children, siblings, other relatives, close friends, and neighbors. The "more" answers were summarized for each respondent, and the scores were divided into three groups of approximately equal size to represent high, average, and low desire for more contact. Significantly more Aurora couples wanted more contacts with family members, close friends, and neighbors. Ninety percent from Aurora, in comparison with 64 percent from Corvallis were in the high and average groups.

#### Perceived Managerial Competency

The respondents from Corvallis and Aurora differed significantly in their perceptions of managerial competence. The total scores were higher in Corvallis. The pattern of responses yielded a higher mean score on all but one of the 25 items for Corvallis respondents. Tests on eight of the 25 items showed differences that were significant statistically. The items, components, and values are shown in Table 42. However, the responses on two-thirds of the items were similar enough to reject the hypothesis that the Corvallis and Aurora samples would differ on perceived managerial competency. On these items the two samples were not from a

Table 42. Differences on Managerial Competence Items by Components in Corvallis and Aurora

Component	Item	Corvallis	Aurora	T Test Score*
		Avg. Score	Avg. Score	
A	<u>Determining Factors and Framework</u> None significant			
B	<u>Collecting and Analyzing Information</u>			
	1. Obtaining, studying, and applying facts and other objective information from professional, educational, or scientific sources.	3.64	2.73	2.87
	2. Obtaining, evaluating, and using ideas and suggestion of your companion, other family members, or friends.	4.28	3.83	2.21
C	<u>Planning and Decision-Making</u>			
	1. Thinking about and planning for the future.	4.29	3.70	2.91
	2. Making appropriate and rewarding decisions.	4.01	3.50	2.34
D	<u>Assessing Human Resources and Interpersonal Skills</u>			
	1. Providing leadership and guidance to other family members.	3.70	3.03	3.14
	2. Obtaining and making the best use of the knowledge and skills of others.	4.22	3.87	2.02
E	<u>Implementing and Co-ordinating</u>			
	1. Carrying out special plans, accomplishing non-routine tasks and activities.	4.15	3.73	2.19
F	<u>Evaluating, Adapting, and Redirecting</u>			
	1. Flexibility to change or adaptability to the unexpected or unusual.	4.46	3.80	3.85

\*All scores given are significant at the .05 level.

different population.

Chi square analysis showed no significant difference on the component devoted to those underlying factors which provide a framework for management: priorities, standards, guidelines, objectives, and goals. One significant difference was found on the component pertaining to evaluation, adaptation, and redirection of managerial activities in household and family affairs. Corvallis respondents rated themselves higher on flexibility to change or adaptability to the unexpected or unusual such as the financial crisis or sickness. Responses on two items from each of the other three components differed in Corvallis and Aurora as shown in Table 42. Average scores for each item were derived from a summation of all individual ratings, on a one to five point scale, divided by the number in the sample.

The retired couples from Aurora and the surrounding rural area reported less ability to carry out special plans or to do non-routine tasks and activities. Differences were found on two of three items in the component on collecting and analyzing information. These included obtaining, studying, and applying facts and other information from professional, educational, or scientific sources, and obtaining, evaluating, and using ideas and suggestions of spouses, other family members, and friends. The first finding superficially appears more logical in the urban university community than does the second

finding. However, physical distance derived from the greater dispersion of farm homes and higher migrations of family members from rural areas may make such information less accessible. It will be recalled that higher proportions of those from Aurora were interested in more contacts with family, friends, and neighbors. Further chi square analyses showed significant differences on two of the four activities in the component on planning and decision making. These included thinking about and planning for the future and making appropriate and rewarding decisions.

The final component for consideration was the assessment of human resources and use of interpersonal skills. Only two of seven items were significantly different, with higher scores reported by Corvallis respondents on providing leadership and guidance to other family members, and obtaining and making the best use of the knowledge and skills of others. These two are somewhat more functional factors in this component in comparison to other items that are more affective or supportive.

No significant differences were found on the number of housing problems, illnesses and disabilities, or close personal friends in Corvallis and Aurora.

### Evaluation of the Interviews

At the conclusion of the interviews, 14 questions were asked of each respondent. Their acceptance of the research was assessed, and their preference for individual or joint interviews was considered. Situational factors, sensory impairments, feelings of anxiety, or recent events that would distort their normal answers were explored. Their understanding of the questions and ability to provide accurate answers were considered. (See Appendix A, p. 189 for the list of questions).

After the interviews were completed, the interviewers evaluated each respondent on eight of the 14 questions to provide data for comparisons. The decision to include evaluation questions in the interview was made after the general pre-test. Therefore, these questions were unavailable during the first two days of interviewing in Corvallis because they needed pretesting and refinement. In addition, some respondents failed to provide answers, so that the total number of answers to the questions in Corvallis varied from 172 to 183.

The majority of the respondents viewed the research positively on three major questions. A higher proportion of the retired couples from Corvallis responded positively toward the research than did those from Aurora. The responses to the following questions indicated positive attitudes about the value of the research. Percentages



were based on those who were asked the questions rather than the total sample.

	Corvallis <u>%</u>	Aurora <u>%</u>
1. Do you think other people should be willing to be interviewed?	97	80
2. Do you think the findings from this research could be helpful to middle-aged and older people in planning and living their lives?	90	66
3. Can a research project like this really get at the feelings and thoughts of people interviewed?	86	75

Chi square tests were also used to see if there were significant differences between responses of the men and women from Corvallis and Aurora. More men than women (15 percent and 5 percent respectively) felt that the research findings would not be helpful to middle-aged and older people. The difference in proportions is not dramatic, however, and the question rises of whether it would be greater during young adulthood and middle age.

The difference in the proportion of yes and no answers given by Corvallis respondents and interviewers to the 14 evaluation questions did not appear unreasonable. This subjective evaluation was made without the benefit of a preestablished quantitative scale for comparison. Differences ranged from a low of 0 to a high of 37 points. The high of 37 represented 22 percent of the interviewers'

answers on the relevant question. The answers by interviewers and respondents to the following question were almost identical, varying by only four points: can a research project like this really get at the thoughts and feelings of people interviewed?

During the planning and pre-testing stages of the study, the investigators were concerned with problems that might arise in joint and separate but simultaneous interviews with retired couples. The respondents were not unanimous in their approval of interviews that were on a separate basis for the majority of questions. However, 70 percent from Corvallis and 60 percent from Aurora did approve. The others said they would rather have had their spouse present all of the time. This is one of the two interview evaluation items on which men and women differed significantly. Women were not as interested in having their husbands present all of the time. However, because most of the interviewers were women, men may have been responding loyally to their wives and to norms of social acceptability in heterosexual relationships. Another factor possibly influencing male responses was that most of the questions pertained to areas in which the wife is normally considered to have more knowledge or expertise.

Two questions assessing the influence of recent events and the normalcy of activities during the week of the interview were asked. These questions were staggered in the series and required a

reversal of answers from yes to no in order for the respondent to remain consistent. The scores on the two questions only varied by two points. The responses suggest a high level of concentration and reliability of answers even at the last part of the interview. The whole interview usually required one and one-half to two hours.

On the question of thinking about other things during the interview, 8 percent of the interviewees responded affirmatively, although 24 percent of the interviewers felt that they were thinking about other things.

Eleven percent said they were unable to hear the questions while 8 percent reported an inability to see well enough to read the items. This corresponds generally with the number of chronic disabilities in hearing and vision reported earlier. The interviewers from Corvallis reported a higher incidence of hearing problems than the respondents did, 24 versus 1 percent. There was less disagreement on answers pertaining to visual difficulties.

Another group of questions pertained to comprehension, the complexity of questions, and the accuracy of answers. One-sixth of the 180 Corvallis respondents and one-third of the 30 respondents from Aurora agreed that some (unspecified) questions had too many possible answers. In an 18-page interview schedule requiring 387 separate decisions and responses, it may be surprising that a higher proportion did not feel that at least some of the questions had too

many alternative answers.

Only six people from Corvallis said they felt anxious or nervous during the interview although the interviewers evaluated 25 as being anxious or nervous. More respondents than interviewers considered some of the questions too personal, 18 and 8 percent respectively. The questions thought to be too personal were not identified. The proportion from Aurora who felt that some questions were too personal was about the same as in Corvallis. The questions on self-image, satisfaction, interpersonal tasks of an affective nature, and certain illnesses may have been those which were "too personal."

This chapter will be concluded on perhaps the most significant question in the evaluation: did you feel reasonably able to give accurate answers to the questions? Ninety-three percent of the respondents (171 out of the 183 answering this question) said they were able to give accurate answers. The interviewers essentially agreed on this point; they reported that 92 percent were indeed able to respond accurately.

## CHAPTER VI

### SUMMARY AND CONCLUSIONS

This chapter includes the summary, the limitations of the study, recommendations for future research, the conclusions, implications, and discussion.

#### Summary

##### Conceptual Framework

The conceptual framework developed for this research has emphasized the physical and psychosocial aspects of living. The primary event considered has been the husband's retirement from his major full time employment. The investigator theorized that retirement may impose upon the retired person a major managerial function of finding new ways to use energy, time, knowledge, and skill. Four systems of related activities were proposed as alternatives to participation in the labor force. These included the home management, psychosocial, creative-cultural, and voluntary service systems. This study was limited to the home management and psychosocial systems.

The home management and psychosocial systems were divided into eight functional areas including food, clothing, financial

resources, household maintenance, yard and secondary living space, health, marital and family relations, and social-community activities. A total of 63 managerial tasks was prepared for the analysis of the eight functional areas. The concept of managerial task was defined as an essential, periodic activity which sustains the living pattern of a person or family in a common household or an adaptive response to problems and opportunities produced by changing human or material resources, environmental situations, or health conditions.

Four types of managerial tasks were defined: routine, complex, transactional, and interpersonal classifications. The tasks were placed into these classifications according to complexity, content, and the social units involved. These classifications were not mutually exclusive. The tasks of each type are given in Appendix D.

Routine managerial tasks exhibited at least one of the following characteristics: the task could be accomplished in a single operation; a relatively fixed pattern was established and followed routinely; or there was an emphasis on physical labor, mechanical processing, or maintenance activities.

Complex managerial tasks were those with one or more of these characteristics: alternative choices were available which required planning or making decisions; the task involved a sequence of related activities which differ in complexity; technical skill was required beyond physical labor; and an element of special study,

supervision, or service was required.

Transactional tasks resembled complex managerial tasks, with the additional characteristic of linking the family as consumer or client with other units of the community providing goods or services.

Interpersonal tasks were defined as those having particular social and/or psychological consequences in maintaining marital, family, or social relationships.

Twenty-five items were also prepared which measured the perceived managerial competence of the respondents. Managerial competence was defined as the ability to identify, obtain, and utilize human and material resources to accomplish tasks and achieve goals. Individual and family goals were considered to include satisfaction and economic security. Items were prepared around the following components of management: underlying determinant factors; collecting and analyzing information; planning and decision making; assessing human resources and interpersonal skills; implementing and co-ordinating; and evaluating, adapting, and redirecting. These were studied in relation to the management of home and family affairs.

The independent variables studied included age, sex, education, income, chronic illness and disabilities, occupational rating, length of retirement, hours currently employed, satisfaction, years

married, anomia, performance evaluations, retirement preparation, and residence in a rural or urban community.

The data were collected through interviewing 102 retired couples from Corvallis and 15 couples from Aurora, Oregon. Most of the thesis was based on the Corvallis data. Information about couples from Aurora is provided only on a comparative, exploratory basis between retired couples from rural and urban communities.

### Characteristics of the Sample

The 102 retired couples from Corvallis interviewed in this study had lived an average of 70 years, had completed high school, had an annual median income of \$5,200 a year, and a median net worth of \$36,400. Nine out of ten lived in their own homes and eight in ten did not have anyone else living with them. They had been retired on the average of five years. Fifty-six percent had been in professional, technical, or managerial occupations. An average of 2.67 chronic illnesses and disabilities per person was reported. However, only three men and none of the women were confined to their homes.

### Findings

Each hypothesis and the relevant findings are reviewed in this section of the chapter. Other issues are also discussed that were



not framed as hypotheses at the beginning of the study. Whenever significant terms are used, they refer to the statistical interpretation at the .05 level.

### Importance of Household Tasks and Family Activities

The findings of this study indicate the importance of home managerial tasks for men before and after their retirement. The family and the home environment provided tasks and activities of importance to at least eight of ten retired men and women. Potential loss of these responsibilities was viewed by them with negative, emotional reactions. Many expressed a feeling that they would be "lost, miserable, useless, or would rather die, " These findings support the hypothesis that:

home managerial and family activities after retirement will be viewed as very important, and perceived alternatives to these activities will be very limited.

Fifty percent of the sample rated the importance of tasks at home in helping them adjust to retirement with a five rating on a low to high, one to five point scale. Thirty percent rated this with three or four points. However, 20 percent rated the importance of tasks at home with low scores of one or two points.

The respondents also rated the contributions of marriage and family activities to adjustments in retirement. Fifteen percent rated these activities with low scores of one or two points. This

proportion was almost identical to the number who were either somewhat dissatisfied or very dissatisfied with the present division of household responsibilities and sharing of family activities. Thus, a minority of 20 percent or less did not view home management and family activities as helpful or satisfactory in retirement. The spouse, daughter, son, and friends, in that order, were reported as having contributed most to a meaningful life after retirement.

#### Preparation for Retirement

The majority of participants in this study reported preparing for retirement in two ways: taking definite financial steps (70 percent) and making decisions about what to do and how to retire successfully (57 percent). About one-half had obtained medical care to maintain health, and one-half had read educational materials. One-third had moved to a different house or apartment after retirement. One-fourth observed others in learning how to retire, or had pre-retirement experiences similar to retirement, such as illness, extended vacations, or unemployment. Observing others may have provided socialization for retirement. These activities may have helped individuals adjust to retirement.

### Distribution and Dominance of Managerial Tasks

Analyses of the responses to questions on doing tasks, revealed definite patterns of dominance by women in the areas of food, clothing, house cleaning, and marital-family relations. Men dominated the tasks in the yard, garden, secondary living space, and finances. An essentially equalitarian pattern emerged in the areas of social-community relations and health maintenance. Retirement of the husband from his major full time employment resulted in significant increases in his involvement and accomplishment of tasks in home and family affairs. This pattern of increased involvement of husbands on selected tasks was supported by a complementary decrease by wives on 17 of the 63 tasks studied. These findings support the hypotheses for a minority of tasks that:

the husband's retirement from gainful employment will result in increased involvement in the managerial tasks at home and in family affairs; and

the husband's increased involvement at home will be accompanied by a complementary pattern of decreased involvement by the wife.

However, the basic pattern was a continuity of tasks before and after retirement. Selective changes were imposed upon this basically stable arrangement, especially in the daily or weekly activities in the areas of food, house cleaning, yardwork, and cleaning clothes. In the general functional areas of finances, marital-family

relations, social-community relations, and health, couples did not report a significant pattern of more involvement for men after retirement. These findings supported the hypothesis that:

despite changes in who accomplishes selected managerial tasks after retirement there will be an underlying pattern of stability and continuity from the pre-retirement period.

Husbands and wives did not increase their involvement in the interpersonal tasks related to maintaining or strengthening their relationships, nor did wives increase interpersonal, supportive activities to help their husbands adjust to retirement. These findings did not support the following hypotheses which were therefore rejected:

husbands and wives will increase their involvement in the interpersonal tasks related to maintaining or strengthening the marital relationship, and

wives will respond to their husbands' retirement by increasing supportive activities which facilitate his adjustments.

The tasks of home management were almost evenly distributed between husbands and wives. Women were doing just over one-half, or 53.6 percent, of all the tasks. Leadership in household and family affairs could best be described as an equalitarian pattern since 75 percent of the men and 61 percent of the women reported that leadership was equally shared.

An analysis of the division of labor between husbands and wives showed that men were doing more transactional and complex tasks. However, this pattern had been established on two-thirds of

these tasks prior to retirement. Husbands increased their involvement after retirement on 50 percent of the routine and 32 percent of the complex managerial tasks.

Increased involvement for men after retirement was only part of an overall pattern of change which also included decreased involvement in some managerial tasks for both men and women. Increased involvement of the respondents in some tasks was almost balanced proportionately by reduced involvement in other tasks which were assigned to someone else or did not apply in their household (10.4 percent and 9.4 percent respectively). Complex managerial and transactional tasks were assigned to someone other than the couple significantly more often than were routine and interpersonal tasks (combined totals of 430 complex and transactional tasks in comparison to 60 routine and interpersonal tasks). The tasks least affected by reduced involvement were the essentials in daily living, namely, tasks in the areas of food, clothing, health, household maintenance, and maintaining marital and family relationships.

The five tasks retired couples were least involved in included preparing the monthly or annual budget; earning money through employment; engaging in regular recreation or sports; figuring annual federal and state income taxes; and making goods of economic value for the home. Four of these tasks pertained directly to the acquisition and management of financial and material resources.

Ninety-five percent of the respondents said they had reached a workable division of responsibilities and sharing of activities. The patterns established were considered to be stable and satisfactory by nine of ten respondents. Over half (55 percent) said they did not require even one month after retirement to develop stable patterns of household work and activities. Nine out of ten women said they had not been reluctant to give responsibilities to their husbands.

These findings appeared to support the hypothesis that:

wives will not report their husbands' retirement as a major adjustment problem.

The level of disagreement between husbands and wives on answers to questions about who performed managerial tasks was not significantly related to satisfaction or perceived managerial competence. Thus the following hypothesis was rejected:

disagreement between husbands and wives on who accomplished the managerial tasks will be negatively associated with levels of satisfaction and perceived managerial competence.

One-half of the men who increased involvement the most, reported low quality of task performance, in comparison with about one-fourth of the 72 men who changed only moderately or the least.

Thus, the following hypothesis was accepted:

increased involvement by men after retirement in home management tasks will be associated negatively with ratings on the quality of task performance.

### Factors Contributing to Changes of Involvement

The following three factors appeared to increase involvement of men in managerial tasks after retirement. First, responsibilities were shared to avoid imbalances in the work and free time in order to enhance the marital relationship. Secondly, a sense of purpose and usefulness was achieved in the performance of tasks that were essential and rewarding. Finally, household work and family activities appeared to help maintain physical and mental health.

Men increased their work for the following specific reasons. First, four in ten of the men helped to avoid boredom. Secondly, one-third of the men reported that their wives delegated new or more responsibilities to them. Finally, one-fourth of the men became more active at home to quit thinking so much about their previous occupation. Women explained their decreased involvement as, stemming from having less time for the activities or having assigned the responsibility to their husbands. A report of having less time for an activity may have been based on a judgment after the fact of getting involved in other time consuming activities. Four in ten husbands said that they got along better with their spouses when they did not get too involved in household tasks.

Husbands and wives reported their chronic illnesses and disabilities. The couples in the study were divided into three groups

based on the number of illnesses and disabilities reported. The low group had less than three illnesses and disabilities, the average group reported three to seven, and the high group reported eight or more illnesses and disabilities. The allocation of tasks, which refers to who accomplished the tasks, was then studied. The allocation of 90 percent of the managerial tasks between husbands, wives, and others, was not affected by the three levels of illness and disability. The allocation of six tasks, (10 percent of the 63 tasks studied) was affected by the level of illness and disability. There were changes of involvement on nine tasks that were influenced by illness and disability. Considering these 15 tasks, the basic finding was that men became more involved as illness and disability of the couples increased. These findings provide only limited support for the general hypothesis and no support for the (secondary hypothesis) that:

differences in educational background and health conditions are expected to influence the distribution of management tasks in the family. (Poor health will result in less involvement.)

Fifteen of the 17 statistically significant findings related to educational differences were in the functional areas of food, household maintenance, health, and financial resources. Husbands and wives with grade school educations shared more equally in food and housecleaning tasks. Wives rather than husbands at the high school,



college, and graduate levels were comparatively more involved in food and housecleaning tasks. As educational level advanced, more men wrote letters and made telephone calls to their children or grandchildren. The task of figuring annual federal and state income taxes was related positively to college and graduate educational background.

Husbands with higher educations accomplished the following tasks significantly more than those with high school or elementary education: maintaining household records on income and expense; making business phone calls and writing letters; cashing checks and making bank deposits; and earning money through gainful employment. Men with higher education also changed less on their involvement in financial tasks after retirement than those with elementary or high school education. Those without higher education reported that wives performed managerial tasks in the financial area or that husbands and wives shared them equally.

Seventy-nine percent of the husbands and wives with college and graduate school experience in comparison with 60 percent of those with elementary and high school backgrounds engaged in volunteer, charitable, and community service work. Those with higher education were also less likely to reduce their participation in such community activities after retirement. A positive relationship was found between higher education and participation in hobbies

and avocational activities, regular recreation and sports, and routine physical exercise. A cross tabulation was completed on educational levels and the types of management tasks. Respondents with advanced education were more involved in the accomplishment of complex and transactional managerial tasks. These findings in the educational area supported the hypothesis (and secondary hypothesis) that:

differences in educational background and health conditions are expected to influence the distribution of managerial tasks in the family. (Higher education will be associated positively with accomplishment of complex managerial tasks. )

#### Perceived Managerial Competence and Related Factors

A 25 item scale on perceived managerial competence was administered to the respondents, who were then divided on the basis of their scores, into three groups of approximately equal size of high, average, and low competence. The scores for the groups ranged from high to low as follows (high 112-125), (average 97-111), and (low 27-96). Cross tabulations of managerial competence with the variables of sex, occupational rating, social anomia, and length of retirement, did not provide any significant differences. Factors related positively to perceived managerial competence, as hypothesized, included the rating of satisfaction and the level of income. The length of the marriage, and the ratings on quality of

task performance were two other factors that were correlated positively with managerial competence.

A positive association existed between the two multi-item measures of satisfaction and perceived managerial competence. Income and net worth were also positively associated with perceived managerial competence but in an irregular pattern. At the highest level of perceived competence, both high and low income groups were equally represented, but at the lowest level of perceived competence, seven out of ten had low incomes. These findings supported the hypothesis that:

perceived managerial competence will be associated positively with income, net worth, and ratings of life satisfaction.

Those who scored low on managerial competence also reported the greatest number of health problems. The average number of illnesses and disabilities for those with the lowest perceived competence was 5.7 in comparison to 4.2 for those with average scores on perceived competence. Those with the highest managerial competence scores were not the most free from health problems, since one-third had eight or more, and one-half had from three to seven illnesses and disabilities.

The following summary of hypotheses investigated indicates those which were accepted and those which were rejected on the basis of the data analysis. Eight of the 11 basic hypotheses were

accepted. The remaining three were rejected.

### Summary of Hypotheses Accepted and Rejected

- |  |          |
|--|----------|
| 1. Home managerial and family activities after retirement will be viewed as very important, and perceived alternatives to these activities will be very limited.                   | Accepted |
| 2. The husband's retirement from gainful employment will result in increased involvement in the managerial tasks at home and in family affairs.                                    | Accepted |
| 3. The husband's increased involvement at home will be accompanied by a complementary pattern of decreased involvement by the wife.  | Accepted |
| 4. Husbands and wives will increase their involvement in the interpersonal tasks related to maintaining or strengthening the marital relationship.                                 | Rejected |
| 5. Wives will respond to their husbands' retirement by increasing supportive activities which facilitate his adjustments.  | Rejected |
| 6. Despite changes in who accomplishes selected managerial tasks after retirement, there will be an underlying pattern of stability and continuity from the pre-retirement period. | Accepted |
| 7. Wives will not report their husbands' retirement as a major adjustment problem.   | Accepted |
| 8. Disagreement between husbands and wives on who accomplished the managerial tasks will be negatively associated with levels of satisfaction and perceived managerial competence. | Rejected |

- |     |  |                                      |
|-----|--|--------------------------------------|
| 9.  | Increased involvement by men after retirement in home managerial tasks will be associated negatively with ratings on the quality of task performance.  | Accepted                             |
| 10. | Differences in educational background and health conditions are expected to influence the distribution of managerial tasks in the family.<br>Higher education will be associated positively with accomplishment of complex managerial tasks.<br>Poor health will result in less involvement. | Accepted<br><br>Accepted<br>Rejected |
| 11. | Perceived managerial competence will be associated positively with income, net worth, and ratings of life satisfaction.  | Accepted                             |

### Major Differences Between Urban and Rural Respondents

A comparison of 37 tasks in the functional areas of health, finances, social-community relations, and marital-family relations, showed significant differences on 14, or 38 percent of those considered. Differences were found on one-half of the tasks in the areas of health and finances, one-third of the tasks in the social-community area, and none from those on marital and family relations.

In Corvallis, men were doing more of the financial work and there was more investment activity, while in Aurora, women were doing more of the financial work than their husbands, or they shared on an equal basis. In the social-community area, the differences included greater encouragement and participation by Aurora women

in religious and church-related activities (43 vs. 22 percent). Higher proportions of the respondents from Corvallis were not engaged in voluntary, charitable, or community service work (28 vs. 7 percent). Furthermore, husbands in Corvallis and wives in Aurora reported visiting more as individuals rather than as couples with neighbors and friends.

In the tasks related to health, higher proportions of men, women, and couples in Corvallis were promoting and engaging in regular physical exercise, and stimulating mental activity, thinking, and intellectual pursuits. A pattern of equal sharing on the accomplishment of health-related tasks, more characterized Corvallis couples, and was reported by three-fourths of them in comparison with one-half of the couples from Aurora. Concerning preparation for retirement, significantly higher proportions of Corvallis couples engaged in reading educational materials, taking definite financial steps, and making advance decisions about what to do and how to retire successfully.

Other general findings showed higher occupational ratings (according to the North-Hatt scale, Appendix G) in Corvallis, more formal social participation by the urban couples, and a greater desire for contact with family members, close friends, and neighbors in Aurora. However, no significant differences were found between the two communities in the number of close personal friends, the

extent of illness and disability, or the frequency of housing problems.

Ratings given by urban and rural respondents were not significantly different on two-thirds of the 25 items used to measure perceived managerial competence. However, the total scores of Corvallis participants were higher and the mean score was higher for them on 24 of the 25 items.

The managerial activities on which those from Corvallis rated themselves significantly higher were obtaining, studying, and applying objective, professional information and the ideas and suggestions of family or friends; thinking about and planning for the future; making appropriate and rewarding decisions; providing leadership and guidance to family members and using the knowledge and skill of others; accomplishing non-routine tasks; and flexibility to adapt to the unexpected or unusual.

#### Evaluation of Interviews and the Research

The majority (97 percent) of those interviewed from Corvallis responded positively to the study by answering that others should be willing to be interviewed, that the findings could be helpful to middle-aged and older people (90 percent), and that it was possible to obtain the real feelings and thoughts of people through this kind of interview and project (86 percent). The support for the project on

these three factors was higher in Corvallis, with a range of 86 to 97 percent in that community, in comparison to a 66 to 80 percent range in Aurora. More men than women felt that the research findings would not be helpful to middle-aged and older people: 15 and 5 percent, respectively.

## Limitations and Recommendations for Future Research

### Limitations of the Study

This investigation has been based on data from interviews with retired men and their wives who were living in a university community or a rural village area in Oregon. Of the 117 couples, 102 lived in the Corvallis area and 15 lived in the Aurora area. The sample was further limited by other eligibility criteria. Since this was a study of married couples, older men and women who were single, widowed, or divorced are not represented. Husbands had to be retired from their primary, full time employment which excluded those who had continued this employment. Husbands had to be at least 60 years old which excluded some with military or other early retirements. The couple had to experience the husband's retirement together, thereby excluding those who married after his retirement. A level of physical and mental health was required which permitted interviews with husband and wife. This excluded certain



couples who made the judgment that one or the other was unable to be interviewed. No attempt was made to interview couples where the husband or wife was in a long term care facility because of physical, mental, or socio-economic dependency.

### Recommendations for Future Research

Future investigations could include people from metropolitan areas, small towns under 25,000 population, and rural non-farm areas. It would have been desirable to interview more retired couples who were earning less than \$2,000 a year, who had a net worth below \$10,000, who did not have telephones, and who were not registered voters.

The framework incorporated the concepts of systems, functional areas, managerial tasks, types of tasks, perceived managerial competence, managerial function, facilitating mechanism, economic, and psychosocial outcomes. The concepts need further study, testing, and refinement through research and theory development. It appears that a framework might be developed for analysis throughout the life cycle of marriages.

Managerial tasks and functions might be specified for each of the adult stages of the life cycle. Although there is a common core of tasks throughout adulthood, there are probably some specialized tasks related to age level. The number of managerial tasks could be

increased to reduce combinations of tasks and achieve more specific differentiation. The theoretical and empirical relationships between managerial tasks and developmental tasks could be examined.

The managerial competence items need additional refinement. The concept of authorizing work appears less relevant for an older married couple than for couples with children at home. The concept of assigning household tasks probably needs modification for studies with adults. The self perception of managerial competence could be studied in relationship to measures of competence provided by professional judges or friends.

The findings on the relationship between perceived managerial competence and the variables of satisfaction, health, and income deserve further analysis. More definitive answers are needed on causal and sequential relationships between these factors. Some experimentation could be considered to determine if there are intervening variables which could modify the correlation patterns.

The diagram on managerial competence items indicates a need for dispersing these items throughout the interview to avoid "carry over effects" between items. Different forms on the managerial task series could be developed, so that the functional areas and related tasks would appear in different sequences and be more dispersed throughout the interview schedule. This would allow for testing the consequences of placement, sequence, and concentration of items.

Since husbands spend more time at home after retirement and do more tasks in the household, it may be desirable to conduct more research on their interests, activities, and recommendations for improving the home environment. Because of the joint involvement of husbands and wives in food service activities it may be appropriate to conduct additional research on the functional and aesthetic aspects of the kitchen and dining areas for middle-aged and retired couples.

### Conclusions, Implications, and Discussion

The data indicate the need for recognition of the importance of home managerial tasks and family relations in retirement. The retired couples interviewed emphasized the importance of these tasks during retirement and saw few alternatives to them. These tasks are the major continuing responsibilities established during earlier years. They appear to provide stability essential to maintaining independence.

Perceptions of managerial competence were associated positively with the measures of life satisfaction, ratings on the quality of task performance, preparations for retirement, and the smallest number of illnesses and disabilities reported by couples. Four other factors associated positively with perceived managerial competence were length of marriage, income, net worth, and education. These findings substantiate the need for management education for adults to

prepare them for middle age and retirement.

Since perceived managerial competence is positively associated with so many important factors it appears to this investigator that the concept may have considerable utility for research, theory, and practice in the broad field of home management. The relationship between managerial competence and independence of decision making, of activity patterns, and of housing and living arrangements in retirement and old age may be one of the most important areas for future analysis and application. To remain independent in retirement is one of the profound concerns of the individual and the society. Therefore, those educational programs and other services which help maintain competencies which facilitate independence, should receive high priority and generous resources.

#### Housing Problems, Questions, and Solutions

One-third of the couples interviewed moved to a different house or an apartment for the retirement years. Will such moves increase for future generations of retirees? If the number and proportion moving after retirement increases, the housing needs of this group will need more study. People who plan, finance, and build for the retirement market may encounter rapid acceleration in the demand for housing units designed especially for retirees.

The dwellings averaged six rooms for each couple. Almost

half reported that high property taxes were a problem. Eliminating one to two rooms from future dwellings could reduce the tax bill, the maintenance, and insurance costs. It may also reduce the amount of money tied up in housing and thus unavailable for other investments and expenditures.

Homeowners reported a need for repairs and a need to remodel, (38 percent and 35 percent respectively). These problems could be reduced if adequate alternatives in housing at reasonable costs were available for rent or sale in the community. Since these alternatives may be slow to develop, some consideration should be given to public consultation services, home repair services, and loans to finance the remodeling.

As age advances and health conditions worsen, people disengage more from social and community activities. The home becomes more of "the environment" and the tasks which are not reduced are those essential to self maintenance, household maintenance, health, and the marital relationship.

More pre-retirement lecture discussion groups could be organized to assist couples and individuals evaluate their housing needs, economic resources, and thoroughly explore the alternatives available to them. Information on the consequences of various housing decisions should be more available. Men could benefit from a little more instruction and guidance on the performance of various

managerial tasks since their increased involvement after retirement appears to result in lower ratings on the quality of task performance.

### Disengagement

Reduced involvement in two-thirds of the tasks in the social-community area reflected social disengagement in retirement and old age. Future studies could help determine the factors which contribute to voluntary, socially prescribed, and forced types of disengagement. There is a need to know the theoretical and practical implications of these different types of disengagement for home management and morale. The consequences of different types of disengagement should be determined, and such information shared with those who would be able to prevent or reduce the negative results. With this rate of social disengagement it would seem imperative to accept the process to maintain satisfaction, adjustment level, and personality integration.

### Patterns of Activities

The patterns of activities enjoyed most by men and women were quite similar, except that women tended more to enjoy social, religious, and sewing activities, while men were more interested in outdoor sports, gardening, and traveling. Special leadership, motivational efforts, and different programs with a masculine

orientation are evidently needed if social and religious organizations are to involve more men.

Women may need to be prepared upon their husbands' retirement for increased involvement in the home and in activities necessary for independent living. Men who emphasize a sharp division of labor between the sexes and support a definite masculine-feminine role, may adjust poorly to the neutralization of differences and sharing of tasks and activities in retirement.

In studying the relationship between educational levels and the allocation of home managerial tasks, it appeared that higher education resulted in a more differentiated and specialized division of labor. Those with the least education reported more equal sharing between husbands and wives of a variety of tasks. Higher education allowed for the accomplishment of more complex and transactional tasks by the husband or wife, rather than relying on outside help or eliminating the task entirely. Higher education was also positively associated with participation in social and community service activities, which appear to be desirable for the individual and the community.

It appears that women generally accepted their husbands' retirement and adjust successfully. Wives did not report resentment about his increased presence in the home nor did they avoid sharing tasks. The majority required a minimum of time to develop new,

stable patterns of household work and family activities. However, these positive findings should not reduce the research activity and concern about the minority of women who reported difficult adjustment problems and trouble with the post retirement division of labor.



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## APPENDICES

## A. INTERVIEW SCHEDULE

## A STUDY OF MANAGEMENT IN RETIREMENT

## OREGON STATE UNIVERSITY

Co-operating

Department of Home Management

School of Home Economics

Agriculture Experiment Station

University Research Council

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

Time Required \_\_\_\_\_

Coder \_\_\_\_\_

RESEARCH ON MANAGERIAL AND RELATED FAMILY  
BEHAVIOR OF RETIRED COUPLES

Department of Home Management, Oregon State University  
Interview Schedule -- April, 1967

Co-Investigators

Martha A. Plonk

Gary D. Hansen

INTERVIEW NUMBER

(1) \_\_\_\_\_

(2) \_\_\_\_\_

(3) \_\_\_\_\_

Card One

1 \_\_\_\_\_

2 \_\_\_\_\_

3 \_\_\_\_\_

(4)

Sex                      1 \_\_\_\_\_ male                      2 \_\_\_\_\_ female                      4 \_\_\_\_\_

(5)

Card Number    \_\_\_\_ 1    \_\_\_\_ 2    \_\_\_\_ 3    \_\_\_\_ 4    \_\_\_\_ 5    \_\_\_\_ 6    \_\_\_\_ 7    5 \_\_\_\_\_

(6-8)

What activities do you enjoy most in your life now days?

\_\_\_\_\_

6 \_\_\_\_\_

\_\_\_\_\_

7 \_\_\_\_\_

\_\_\_\_\_

8 \_\_\_\_\_

(9-11)

What do you feel makes these activities enjoyable?

\_\_\_\_\_

9 \_\_\_\_\_

\_\_\_\_\_

10 \_\_\_\_\_

\_\_\_\_\_

11 \_\_\_\_\_

(12)

With whom do you share these activities?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

12 \_\_\_\_\_

Every household and family has a variety of chores and activities that are necessary for daily living, for using resources, and achieving goals. The next part of our interview deals with how the specific tasks and activities are divided up between the husband and wife. It is also a careful consideration of whether or not and how, the husband's retirement has influenced the division and sharing of work and activities.

QUESTION A: Who accomplishes the task or does this job?

Read Vertically

- |  |           |           |
|--|-----------|-----------|
|  | <u>A</u>  | <u>B</u>  |
| 1. Husband   | H W E O D | L S M O D |
| 2. Wife  | U I Q T N | E A O T N |
| 3. Equally Shared  | S F U H A | S M R H A |
| 4. Another Person  | B E L R   | S E E R   |
| 5. Not a Task in this Household,<br>Does Not Apply (DNA) |           |           |

QUESTION B: How much are you now involved in comparison to before (you) (your husband) retired?

1. Less
2. Same
3. More
4. Another Person
5. Does Not Apply

#### FOOD SERVICE AND RELATED ACTIVITIES

1 2 3 4 5    1 2 3 4 5

- |  |           |           |
|--|-----------|-----------|
| Shopping for, selecting, and buying groceries        | 13. _____ | 14. _____ |
| Storing food and other kitchen supplies              | 15. _____ | 16. _____ |
| Planning meals and menus for nutrition and enjoyment | 17. _____ | 18. _____ |
| Preparing and serving the food                       | 19. _____ | 20. _____ |
| Setting and clearing dishes from table               | 21. _____ | 22. _____ |
| Washing or drying dishes                             | 23. _____ | 24. _____ |
| Disposal of waste, emptying garbage                  | 25. _____ | 26. _____ |

#### CLOTHING, LINENS, AND RELATED ACTIVITIES

- |   |           |           |
|---|-----------|-----------|
| Comparing, selecting, and buying clothing | 27. _____ | 28. _____ |
| Washing and drying clothes and linens     | 29. _____ | 30. _____ |
| Ironing                                   | 31. _____ | 32. _____ |



QUESTION A: Who accomplishes the task or  
does this job?

Read Vertically

QUESTION B: How much are you now involved  
in comparison to before (you)  
(your husband) retired?

<u>A</u>	<u>B</u>
HWEOD	LSMOD
UIQTN	EAOTN
SFUHA	SMRHA
BELR	SEER

CLOTHING, LINENS, AND RELATED  
ACTIVITIES (Continued)

1 2 3 4 5 1 2 3 4 5

Folding and storing clothes and linens

33. \_\_\_\_\_ 34. \_\_\_\_\_

Obtaining dry cleaning services

35. \_\_\_\_\_ 36. \_\_\_\_\_

YARD, GARDEN, SECONDARY LIVING AREAS  
RELATED ACTIVITIES

Mowing, raking, weeding, and fertilizing lawn

37. \_\_\_\_\_ 38. \_\_\_\_\_

Maintaining flower beds and shrubs

39. \_\_\_\_\_ 40. \_\_\_\_\_

Planting, watering, weeding, and harvesting  
vegetables, berries, nuts, etc.

41. \_\_\_\_\_ 42. \_\_\_\_\_

Cleaning garage, basement, tool shed, work  
bench, and outdoor service areas

43. \_\_\_\_\_ 44. \_\_\_\_\_

Handling and storing screens, lawn  
furniture, etc.

45. \_\_\_\_\_ 46. \_\_\_\_\_

Driving the car and chauffeuring

47. \_\_\_\_\_ 48. \_\_\_\_\_

Obtaining maintenance, servicing, and repairs  
for the car

49. \_\_\_\_\_ 50. \_\_\_\_\_

Shopping for, selection, and purchase of new  
or used cars

51. \_\_\_\_\_ 52. \_\_\_\_\_

HOUSEHOLD MAINTENANCE, CLEANING, AND  
RELATED ACTIVITIES

Sweeping, dusting, or vacuuming floors

53. \_\_\_\_\_ 54. \_\_\_\_\_

Major seasonal or annual housecleaning

55. \_\_\_\_\_ 56. \_\_\_\_\_

Making beds

57. \_\_\_\_\_ 58. \_\_\_\_\_

Repair of house, furniture, and appliances

59. \_\_\_\_\_ 60. \_\_\_\_\_

Painting inside walls, cabinets, trim, etc.

61. \_\_\_\_\_ 62. \_\_\_\_\_

Care of indoor plants or house pets

63. \_\_\_\_\_ 64. \_\_\_\_\_

QUESTION A: Who accomplishes the task or  
does this job?

Read Vertically

QUESTION B: How much are you now involved  
in comparison to before (you)  
(your husband) retired?

<u>A</u>	<u>B</u>
HWEOD	LSMOD
UIQTN	EAOTN
SFUHA	SMRHA
BELR	SEER

### MARITAL AND FAMILY RELATIONS

1 2 3 4 5 1 2 3 4 5

Assuming leadership in household and  
family affairs

65. \_\_\_\_\_ 66. \_\_\_\_\_

Showing concern for and listening to  
companion's problems

67. \_\_\_\_\_ 68. \_\_\_\_\_

Writing letters or calling children or  
grandchildren

69. \_\_\_\_\_ 70. \_\_\_\_\_

Expressing respect, appreciation, and  
love for companion

71. \_\_\_\_\_ 72. \_\_\_\_\_

Visiting children and grandchildren

73. \_\_\_\_\_ 74. \_\_\_\_\_

Giving encouragement and moral support  
to companion

75. \_\_\_\_\_ 76. \_\_\_\_\_

Planning special family events (i. e. picnic,  
reunion, trip)

77. \_\_\_\_\_ 78. \_\_\_\_\_

### FINANCIAL RESOURCES AND MANAGEMENT

Card Two

Study of government programs related to  
personal and family finances

6. \_\_\_\_\_ 7. \_\_\_\_\_

Study, decision, and investment in property,  
stocks, and bonds

8. \_\_\_\_\_ 9. \_\_\_\_\_

Study, decision, and purchase of life,  
hospital, and medical insurance

10. \_\_\_\_\_ 11. \_\_\_\_\_

Study, decision, and purchase of car, fire,  
liability, and other property insurance

12. \_\_\_\_\_ 13. \_\_\_\_\_

Figuring annual federal and state income taxes

14. \_\_\_\_\_ 15. \_\_\_\_\_

Maintaining records of income and expenses

16. \_\_\_\_\_ 17. \_\_\_\_\_

Preparing the monthly and/or annual budget

18. \_\_\_\_\_ 19. \_\_\_\_\_

Paying the bills

20. \_\_\_\_\_ 21. \_\_\_\_\_

Making business phone calls and writing letters

22. \_\_\_\_\_ 23. \_\_\_\_\_

QUESTION A: Who accomplishes the task or  
does this job?

Read Vertically

QUESTION B: How much are you now involved  
in comparison to before (you)  
(your husband) retired?

<u>A</u>	<u>B</u>
HWEOD	LSMOD
UIQTN	EAOTN
SFUHA	SMRHA
BELR	SEER

FINANCIAL RESOURCES AND MANAGEMENT  
(Continued)

1 2 3 4 5 1 2 3 4 5

Signing and cashing income checks and making bank deposits	24. _____	25. _____
Earning money through gainful employment	26. _____	27. _____
Making goods of economic value for the home or couple	28. _____	29. _____
Responsibility for the family estate, the will, and related matters	30. _____	31. _____

SOCIAL -- RECREATIONAL, INTELLECTUAL,  
RELIGIOUS, COMMUNITY

Visiting with neighbors and friends	32. _____	33. _____
Encouraging and participating in religious and church related activities	34. _____	35. _____
Voting, participating in civic affairs, being a citizen	36. _____	37. _____
Receiving and serving as host/hostess to guests, entertaining	38. _____	39. _____
Stimulating mental activity, thinking, and intellectual pursuits	40. _____	41. _____
Engaging in volunteer, charitable, or community service work	42. _____	43. _____
Encouraging and participating in hobbies and avocational activities	44. _____	45. _____
Initiating and participating in social activities	46. _____	47. _____
Engaging in regular recreation, sports, etc.	48. _____	49. _____

QUESTION A: Who accomplishes the task or does the job?

Read vertically

QUESTION B: How much are you now involved in comparison to before (you) (your husband) retired?

<u>A</u>	<u>B</u>
HWEOD	LSMOD
UIQTN	EAOTN
SFUHA	SMRHA
BELR	SEER

### HEALTH

1 2 3 4 5    1 2 3 4 5

Promoting and engaging in routine physical exercise

50. \_\_\_\_\_ 51. \_\_\_\_\_

Encouraging and obtaining regular physical examination

52. \_\_\_\_\_ 53. \_\_\_\_\_

Using or supervising the use of prescribed drugs

54. \_\_\_\_\_ 55. \_\_\_\_\_

Assuming responsibility for safety and accident prevention

56. \_\_\_\_\_ 57. \_\_\_\_\_

Guiding health and hygiene practices in the home

58. \_\_\_\_\_ 59. \_\_\_\_\_

Providing personal care of sick or disabled family member and doing more housework in times of illness or disability

60. \_\_\_\_\_ 61. \_\_\_\_\_

Obtaining medical and dental care as needed

62. \_\_\_\_\_ 63. \_\_\_\_\_

Deciding on hospital, nursing home, or other facility necessary

64. \_\_\_\_\_ 65. \_\_\_\_\_

Many different goals, conditions, pressures, and resources influence our actions at each stage of the life cycle. The next few questions deal with how such factors influenced your retirement, your involvement in the home and family, and your judgment about how well the tasks and activities are accomplished.

(6-22)

Card Three

Which of the following factors have increased your involvement in various home and family responsibilities and activities since (you) (your husband) retired?

Yes	No
2	1

6. Poor health of spouse

6. \_\_\_\_\_

7. More time for involvement

7. \_\_\_\_\_

8. Have become more interested

8. \_\_\_\_\_

9. Increased need for a well planned budget

9. \_\_\_\_\_

- |  |           |
|--|-----------|
| 10. To achieve a sense of accomplishment                   | 10. _____ |
| 11. My spouse delegated new or more responsibilities to me | 11. _____ |
| 12. So my children or others will not worry about me       | 12. _____ |
| 13. To quit thinking so much about my previous occupation  | 13. _____ |
| 14. To reduce boredom                                      | 14. _____ |
| 15. To do my share around the house                        | 15. _____ |
| 16. To maintain a satisfying and stable marriage           | 16. _____ |
| 17. To make up for a previous lack of involvement          | 17. _____ |
| 18. To maintain or improve physical health                 | 18. _____ |
| 19. To maintain mental health                              | 19. _____ |
| 20. To relieve my companion from excessive work            | 20. _____ |
| 21. To feel useful   | 21. _____ |
| 22. Other, SPECIFY: _____                                  | 22. _____ |
| _____  | _____     |

(23-35)

Which of the following factors have decreased your involvement in various home and family responsibilities and activities since (you) (your husband) retired?

- |   |           |
|---|-----------|
| 23. Declining physical health, sickness or disability                         | 23. _____ |
| 24. Less time for these activities  | 24. _____ |
| 25. My interests have changed   | 25. _____ |
| 26. Adequate resources have reduced worries about finances                    | 26. _____ |
| 27. I feel I accomplish little or nothing pursuing these activities           | 27. _____ |
| 28. No one depends upon me in particular                                      | 28. _____ |
| 29. My spouse has regained his/her health and is assuming more responsibility | 29. _____ |
| 30. I have assigned some of these activities to my spouse                     | 30. _____ |
| 31. My spouse and I get along better when I do not get too involved           | 31. _____ |
| 32. My spouse expressed increased opposition to such involvement              | 32. _____ |
| 33. I have new or different interests   | 33. _____ |
| 34. I am not at home as much as before  | 34. _____ |
| 35. Other, SPECIFY: _____   | 35. _____ |
| _____   | _____     |

(36-43)

In general, how well are the activities accomplished in your home and family in the following groups? (Use 5 as the highest, 1 as the lowest, and 3 as the average rating. )

	Circle One					
Obtaining, preparing, and serving food	5	4	3	2	1	(36)
Clothing, linens, and related activities	5	4	3	2	1	(37)
Household cleaning and maintenance	5	4	3	2	1	(38)
Yard, garden, garage, and basement	5	4	3	2	1	(39)
Marriage and family relations	5	4	3	2	1	(40)
Obtaining and managing financial resources	5	4	3	2	1	(41)
Social, recreational, mental, and community activities	5	4	3	2	1	(42)
Maintaining and caring for health	5	4	3	2	1	(43)

(44)

Do you feel you have reached a reasonable and workable division of responsibilities and sharing of activities (1)yes\_\_\_\_ (2)no\_\_\_\_ (44)

(45)

How satisfied are you with the present arrangements?

(4) Very satisfied\_\_\_\_ (2) Satisfied\_\_\_\_  
 (3) Somewhat satisfied\_\_\_\_ (1) Very dissatisfied\_\_\_\_ (45)

(46-48)

Do you feel a period of stabilization in this work and activity has been reached? no\_\_\_\_ yes\_\_\_\_: If yes; how many (46)  
 months or years after retirement did it take to develop the (47)  
 new pattern and stability? \_\_\_\_ (48)

(49-51)

Have you been reluctant in your thinking or feeling to give up certain responsibilities to your companion? no\_\_\_\_yes\_\_\_\_; (49)  
 which ones? \_\_\_\_\_ (50)  
 \_\_\_\_\_ (51)

(52-54)

Have you felt you were interfering, disrupting or taking over the place or functions of your companion? no\_\_\_\_yes\_\_\_\_: (52)  
 what functions? \_\_\_\_\_ (53)  
 \_\_\_\_\_ (54)

(55-56)

How would you feel if you did not have any responsibilities  
at home? \_\_\_\_\_

(55)

(56)

(57-59)

What would you do? \_\_\_\_\_

(57)

(58)

(59)

(60-72)

A. To what extent have the following people helped you make life  
after retirement meaningful? Use a 5 point rating with 5 as  
helped greatly, 3 as somewhat, and 1 as none at all.

	A					
(Wife) (Husband)	5	4	3	2	1	(60)
Daughter/s	5	4	3	2	1	(61)
Son/s	5	4	3	2	1	(62)
Doctor	5	4	3	2	1	(63)
Minister or Religious Leader	5	4	3	2	1	(64)
Educator or Teacher	5	4	3	2	1	(65)
Financial or Legal Adviser	5	4	3	2	1	(66)
Individual or Family Counselor	5	4	3	2	1	(67)
Friend/s	5	4	3	2	1	(68)
Neighbor/s	5	4	3	2	1	(69)
Work Associate/s	5	4	3	2	1	(70)
Other Retired People	5	4	3	2	1	(71)
Other, SPECIFY: _____	5	4	3	2	1	(72)

(73-78)

B. Which, if any, of these people helped you anticipate and accept  
retirement? (First, second, and third choices in order of  
helpfulness; write in below.)

	B	
1st _____		
2nd _____		
3rd _____		
	73	_____
	74	_____
	75	_____
	76	_____
	77	_____
	78	_____

## Card Four

(6)

How important have tasks or responsibilities at home been in helping you adjust to retirement? (5 very important - 1 not important) 5 4 3 2 1 (6)

(7)

To what extent have your marriage and family activities helped you adjust to retirement? (5 greatly - 1 not at all) 5 4 3 2 1 (7)

(8-16)

Which, if any, of the following did you engage in, to anticipate and prepare for retirement?

	yes 2	no 1	
Read educational materials	_____	_____	(8)
Went to school (night-day or extension) in order to prepare myself	_____	_____	(9)
Had some form of advice or guidance prior to retirement	_____	_____	(10)
Moved to a different house or apartment for the retirement years	_____	_____	(11)
Received medical care or treatment to improve or maintain health	_____	_____	(12)
Took definite financial steps to prepare for retirement	_____	_____	(13)
Observed others to learn how to retire	_____	_____	(14)
Made various decisions in advance about what to do and how to retire successfully	_____	_____	(15)
Practiced or experienced some things in advance that were like retirement	_____	_____	(16)

The next part of our interview deals with your thoughts about you as a manager of the various resources available to you.

(17-41)

In the responsibilities and activities of the home, your marriage and family, how do you rate yourself on the following? (Use a numerical scale from 5 to 1 with 5 as the highest, 3 the middle or average, and 1 the lowest rating. )

Thinking about and planning for the future 5 4 3 2 1 (17)

Effective completion of routine tasks and regular work 5 4 3 2 1 (18)



Being aware of and accepting the skills and limitations of others	5	4	3	2	1	(19)
Deciding on what is most and least important, first or last, and establishing priorities	5	4	3	2	1	(20)
Obtaining, studying, and applying facts and other objective information from professional, educational or scientific sources	5	4	3	2	1	(21)
Getting jobs done through organized effort such as by bringing people, resources, and tasks together	5	4	3	2	1	(22)
Changing plans, methods or resources when you or others find them unsatisfactory or unworkable	5	4	3	2	1	(23)
Being alert and responsive to the interests, needs, and problems of others	5	4	3	2	1	(24)
Maintaining time schedules, sequences of work, and other activities that are satisfactory to you and others	5	4	3	2	1	(25)
Encouraging and stimulating creative thinking and productiveness in others	5	4	3	2	1	(26)
Making appropriate and rewarding decisions	5	4	3	2	1	(27)
Obtaining, evaluating, and using ideas and suggestions of your companion and other family members or friends	5	4	3	2	1	(28)
Setting standards and guidelines for work and conditions of the house, such as for cleanliness and order	5	4	3	2	1	(29)
Assigning, authorizing, and sharing the work	5	4	3	2	1	(30)
Budgeting money, defined as the planned distribution and use of financial resources	5	4	3	2	1	(31)
Providing leadership and guidance to other family members	5	4	3	2	1	(32)
Flexibility to change or adapt to the unexpected or unusual (such as, financial crisis, sickness or unanticipated help)	5	4	3	2	1	(33)
Identifying alternative choices or approaches to decisions or problems	5	4	3	2	1	(34)

Using special techniques or equipment to simplify work, reducing the time or energy it requires	5	4	3	2	1	(35)
Establishing immediate objectives and long range goals	5	4	3	2	1	(36)
Evaluating how well tasks are accomplished	5	4	3	2	1	(37)
Awareness of and providing recognition for the efforts and supportiveness of others	5	4	3	2	1	(38)
Recognizing problems that exist, identifying the real issues, and analyzing the different aspects of problems and issues	5	4	3	2	1	(39)
Carrying special plans out, accomplishing non-routine tasks and activities	5	4	3	2	1	(40)
Obtaining and making the best use of the knowledge and skills of others, as needed	5	4	3	2	1	(41)

(42-54)

How do you feel about the following statements? Here is a card with the possible answers on it. Indicate your agreement or disagreement with each statement I read.

Teachers should be allowed to hold public office	5	4	3	2	1	(42)
Most public officials (people in public office) are not really interested in the problems of the average man	5	4	3	2	1	(43)
I'd rather live in this community and the Pacific Northwest than anywhere else	5	4	3	2	1	(44)
Unemployment usually results from the attempts of politicians to control private enterprise	5	4	3	2	1	(45)
Older people should not live in retirement homes or communities	5	4	3	2	1	(46)
These days a person doesn't really know whom he can count on	5	4	3	2	1	(47)
Delinquency is not as serious a problem as the papers play it up to be	5	4	3	2	1	(48)
Nowadays a person has to live pretty much for today and let tomorrow take care of itself	5	4	3	2	1	(49)
College professors tend to be radical when it comes to politics	5	4	3	2	1	(50)

Religious faith and beliefs add meaning and security to life	5	4	3	2	1	(51)
In spite of what some people say, the lot (situation) (condition) of the average man is getting worse	5	4	3	2	1	(52)
Male and female friends are very important throughout adulthood	5	4	3	2	1	(53)
Most people don't really care what happens to the next fellow	5	4	3	2	1	(54)

As you know, circumstances in life change and satisfactions may differ considerably about various aspects of living or things available for our use.

(55-72)

How satisfied are you about the following factors in your present situation? (Rate on a 5 point scale using 5 as very satisfied, 3 for moderately satisfied and 1 for very dissatisfied).

Housing accomodations	5	4	3	2	1	(55)
Recreation	5	4	3	2	1	(56)
Work	5	4	3	2	1	(57)
Physical aspects of the neighborhood	5	4	3	2	1	(58)
Religious and spiritual matters	5	4	3	2	1	(59)
Government in general	5	4	3	2	1	(60)
Social life with neighbors	5	4	3	2	1	(61)
Married life	5	4	3	2	1	(62)
Community services and facilities	5	4	3	2	1	(63)
Financial resources	5	4	3	2	1	(64)
Friendships	5	4	3	2	1	(65)
Physical health condition	5	4	3	2	1	(66)
Furniture and appliances	5	4	3	2	1	(67)
Transportation	5	4	3	2	1	(68)
Family contacts and association	5	4	3	2	1	(69)
Use of time	5	4	3	2	1	(70)
Available energy	5	4	3	2	1	(71)
Mental health condition	5	4	3	2	1	(72)

(73-79)

How would you rate yourself on the following factors? (use a 5 point scale with 5 as the highest, 3 as average, and 1 as the lowest rating).

Usefulness	5	4	3	2	1	(73)
Problem solving ability	5	4	3	2	1	(74)
Personal appearance	5	4	3	2	1	(75)
Personal views and feelings about your age	5	4	3	2	1	(76)
Self confidence	5	4	3	2	1	(77)
Living in the present and for the future	5	4	3	2	1	(78)
Happiness	5	4	3	2	1	(79)

You've been doing very nicely on some questions that require a lot of discrimination and careful judgment. Would you like to rest for a while or continue on? The next questions, which are relatively easy and more factual, are usually included in social science research. They have been saved for the last part of this interview. Please remember that the information you share is completely confidential and that accuracy and completeness are vitally necessary components in scientific research.

Card Five

(6-7)

How many months have you been retired from your major full time job? \_\_\_\_\_ 6 \_\_\_\_\_  
7 \_\_\_\_\_

(8-9)

How many years have you been married to your present wife or husband? \_\_\_\_\_ 8 \_\_\_\_\_  
9 \_\_\_\_\_

(10-11)

How old are you? \_\_\_\_\_ 10 \_\_\_\_\_  
11 \_\_\_\_\_

(12-13)

How many years of school have you completed? \_\_\_\_\_ 12 \_\_\_\_\_  
13 \_\_\_\_\_

(14-15)

What is or has been your major work skill? \_\_\_\_\_ 14 \_\_\_\_\_  
15 \_\_\_\_\_

(16-17)

What, if any, is your secondary work skill? \_\_\_\_\_ 16 \_\_\_\_\_  
17 \_\_\_\_\_

(18-19)

On the average, how many hours, if any, per week do you  
 now devote to employment, consultation, investing, or 18 \_\_\_\_\_  
 other income producing activities? 19 \_\_\_\_\_

(20)

With regard to gainful activity for income purposes,  
 are you fully employed, partly or fully retired, and  
 which do you want to be?

- 1 \_\_\_\_\_ employed 25-39 hours/wk and wants it
- 2 \_\_\_\_\_ employed 25-39 hours/wk and wants less
- 3 \_\_\_\_\_ employed 25-39 hours/wk and wants full retirement
- 4 \_\_\_\_\_ partly retired and wants it (works 24 hours or less per week)
- 5 \_\_\_\_\_ partly retired and wants full employment
- 6 \_\_\_\_\_ partly retired and wants full retirement
- 7 \_\_\_\_\_ fully retired and wants it
- 8 \_\_\_\_\_ fully retired and wants full employment
- 9 \_\_\_\_\_ OC 20 \_\_\_\_\_

(21)

- 1 \_\_\_\_\_ fully retired and wants part employment
- 2 \_\_\_\_\_ employed full time and prefers it (40 hours or more)
- 3 \_\_\_\_\_ employed full time and wants partial or complete retirement
- 4 \_\_\_\_\_ other, SPECIFY
- 5 \_\_\_\_\_ OC
- 6 \_\_\_\_\_ NA 21 \_\_\_\_\_

The next few questions are about your family, friends, and social  
 activities.

(22-23)

How many living brothers and sisters do you have? 22 \_\_\_\_\_ 23 \_\_\_\_\_

(24-25)

How many living children do you have? 24 \_\_\_\_\_ 25 \_\_\_\_\_

(26-27)

How many living grandchildren do you have? 26 \_\_\_\_\_ 27 \_\_\_\_\_

(28-29)

How many close personal friends do you have? 28 \_\_\_\_\_ 29 \_\_\_\_\_

(30-39)

Considering the number, frequency, and length of visits, telephone calls, and letters, do you want to have more, less, or the same amount of contact with the following? (Check space to left if no son, etc., and go to the next item)

	1 Want less	2 Want same	3 Want more	
_____ Son/s	_____	_____	_____	30 _____
_____ Daughter/s	_____	_____	_____	31 _____
_____ Sister/s	_____	_____	_____	32 _____
_____ Grandchild/ren	_____	_____	_____	33 _____
_____ Other relatives	_____	_____	_____	34 _____
_____ Close Friend/s	_____	_____	_____	35 _____
_____ Neighbor/s	_____	_____	_____	36 _____
				37 _____
				38 _____
				39 _____

(40-46)

Are you a member, committeeman or officer in any of the following types of organizations? (If more than one within a group specify the total number.)

	No.	Member	Committee	Officer	
					40 _____
_____ Church-religious	_____	_____	_____	_____	41 _____
_____ Social-fraternal	_____	_____	_____	_____	42 _____
_____ Recreational-hobby	_____	_____	_____	_____	43 _____
_____ Professional-occupational	_____	_____	_____	_____	44 _____
_____ Civic-community-political	_____	_____	_____	_____	45 _____
					46 _____

(47-53)

Would you like to attend and participate more, less, or the same in these different types of organizations?

	Non member	Less	Same	More	
					47 _____
_____ Church-religious	_____	_____	_____	_____	48 _____
_____ Social-fraternal	_____	_____	_____	_____	49 _____
_____ Recreational-hobby	_____	_____	_____	_____	50 _____
_____ Professional-occupational	_____	_____	_____	_____	51 _____
_____ Civic-community-political	_____	_____	_____	_____	52 _____
					53 _____

The final questions of the interview are on health, financial resources, and housing

## Illness, Disability, and Confinement

Does anyone in your household have any of the following conditions according to a professional medical diagnosis?

					Card Six				
					N H W O				
					O U I T				
					S F H				
					B E R				
(6-50)	0	1	2	3		0	1	2	3
Asthma					(6) Epilepsy				
Tuberculosis					(7) Chronic ner-				
Chronic Bronchitis					(8) vous trouble				
Repeated attacks of sinus trouble					(9) Cancer				
Rheumatic fever					(10) Chronic skin				
Hardening of the arteries					(11) trouble				
High blood pressure					(12) Hernia or				
Heart trouble					(13) rupture				
Stroke					(14) Prostate trouble				
Trouble with varicose veins					(15) Deafness or				
Hemorrhoids or piles					(16) serious hearing				
Hay fever					(17) trouble				
Tumor, cyst or growth					(18) Serious trouble				
Chronic gallbladder or liver trouble					(19) with seeing even				
Stomach ulcer					(20) with glasses				
Any other chronic stomach trouble					(21) Cleft palate				
Kidney stones or chronic kidney trouble					(22) Any speech defect				
Arthritis or rheumatism					(23) Missing fingers,				
Mental illness					(24) hand or arm-				
Diabetes					(25) toes, foot, leg				
Thyroid trouble or goiter					(26) Palsy				
Any allergy					(27) Paralysis of any				
Anemia					(28) kind				
Alcoholism					(29) Repeated trouble				
					(30) w/back or spine				
					(31) Perm. stiffness or				
					(32) any deformity of				
					(33) foot, leg, fingers,				
					(34) arm or back				
					(35) Any condition pres-				
					(36) ent since birth				
					(37) None of these				
					(38)				
					(39)				
					(40)				
					(41)				
					(42)				
					(43)				
					(44)				
					(45)				
					(46)				
					(47)				
					(48)				
					(49)				
					(50)				

(51-54)

Is anyone in your household confined in any way?

	Confined to:					
	Bed	Wheel chair	Home	Yard	No	
	5	4	3	2	1	
Husband	_____	_____	_____	_____	_____	51 _____
Wife	_____	_____	_____	_____	_____	52 _____
Other	_____	_____	_____	_____	_____	53 _____
Total confined	_____	_____	_____	_____	_____	54 _____

## Financial Resources

From which sources did you receive income last year? Name all.

(55-59)

1 _____ OASI-Social Security	1 _____ savings	
2 _____ OAA-Old Age Assistance	2 _____ pensions	
3 _____ medical assistance to	3 _____ insurance	
aged (MAA)	4 _____ investments	55 _____
4 _____ work by self	5 _____ other: SPECIFY	56 _____
5 _____ work by spouse	_____	57 _____
6 _____ friends	6 _____ none	58 _____
7 _____ children or relatives	7 _____ OC	59 _____
8 _____ OC		

(60-62)

Which are the three major sources of income in 1966? Rank order 1, 2, 3.

1 _____ OASI -Social Security	1 _____ pensions	
2 _____ OAA-Old Age Assistance	2 _____ insurance	
3 _____ work by self	3 _____ investments	
4 _____ work by spouse	4 _____ other:SPECIFY	60 _____
5 _____ friends	_____	61 _____
6 _____ children or relatives	5 _____ OC	62 _____
7 _____ savings		
8 _____ OC		

What was your average annual income from all sources including that of your spouse during 1955 to 1965? Show card

(63)

1 _____ less than \$2, 000	6 _____ \$10, 000-\$11, 999	
2 _____ \$2, 000-\$3, 999	7 _____ \$12, 000-\$13, 999	
3 _____ \$4, 000-\$5, 999	8 _____ \$14, 000-\$15, 999	
4 _____ \$6, 000-\$6, 999	9 _____ \$16, 000 or over: SPECIFY	
5 _____ \$7, 000-\$9, 999	_____	63 _____



What was your income for all sources including that of your spouse in 1966? Show card.

(64)

1 _____ 0-\$999	6 _____ \$5,000-\$5,999
2 _____ \$1,000-\$1,999	7 _____ \$6,000-\$6,999
3 _____ \$2,000-\$2,999	8 _____ \$7,000-\$9,999
4 _____ \$3,000-\$3,999	9 _____ \$10,000 and over: SPECIFY
5 _____ \$4,000-\$4,999	_____ 64 _____

(65)

What is the approximate market value of your home? \$ \_\_\_\_\_  
If you add up the value of all your property and other assets and then subtract your debts, how much would you have left? Show card

Property \$ _____	0 _____ in debt or zero	6 _____ \$20,000-\$29,999
Other assets \$ _____	1 _____ \$1-\$2,499	7 _____ \$30,000-\$39,999
(Total) \$ _____	2 _____ \$2,500-\$4,999	8 _____ \$40,000-\$49,999
Minus debts \$ _____	3 _____ \$5,000-\$9,999	9 _____ \$50,000 or more
Net worth \$ _____	4 _____ \$10,000-\$14,999	SPECIFY
	5 _____ \$15,000-\$19,999	_____ 65 _____

### Housing and Living Arrangements

### Card Seven

(6)

Do you live in:

1 _____ A single family house	6 _____ A retirement home
2 _____ An efficiency apartment	7 _____ Your house or apartment with your children
3 _____ A larger apartment (K-LR or LR-BR)	8 _____ In the household of your children
4 _____ A hotel or motel	9 _____ Other, SPECIFY
5 _____ A trailer house	_____ 6 _____

(7)

Do you:

1 _____ Own your home completely	4 _____ Have a room provided without cost to you
2 _____ Still make house payments	5 _____ Other, SPECIFY
3 _____ Rent your living quarters	_____ 7 _____

(8)

Does anyone else live with you and your (wife) or (husband)?

- |  |  |                            |
|--|--|----------------------------|
| 1 <input type="checkbox"/> No                                  | 7 <input type="checkbox"/> Other non-relatives       |                            |
| 2 <input type="checkbox"/> Daughter/s                          | 8 <input type="checkbox"/> Other combination:SPECIFY |                            |
| 3 <input type="checkbox"/> Son/s                               |  |                            |
| 4 <input type="checkbox"/> Brother/s or sister/s               | 9 <input type="checkbox"/> NA                        |                            |
| 5 <input type="checkbox"/> Son/s and daughter/s                |  | 8 <input type="checkbox"/> |
| 6 <input type="checkbox"/> Other relatives not mentioned above |  |                            |

(9-10)

How many rooms are there in your (house, apt, or ☐)? 9 ☐  
 10 ☐

(11-14)

Which, if any, of the following rooms or areas are used less than once a week?

- |  |   |                             |
|--|---|-----------------------------|
| 0 <input type="checkbox"/> None (all are used)             | 5 <input type="checkbox"/> Family room    |                             |
| 1 <input type="checkbox"/> One secondary bedroom           | 6 <input type="checkbox"/> Utility room   |                             |
| 2 <input type="checkbox"/> Two or more secondary bedrooms  | 7 <input type="checkbox"/> Garage         |                             |
| 3 <input type="checkbox"/> One or more secondary bathrooms | 8 <input type="checkbox"/> Basement       |                             |
| 4 <input type="checkbox"/> Dining room                     | 9 <input type="checkbox"/> Other, SPECIFY | 11 <input type="checkbox"/> |
|  |   | 12 <input type="checkbox"/> |
|  |   | 13 <input type="checkbox"/> |
|  |   | 14 <input type="checkbox"/> |

(15-23)

Does your (House, Apt. or ☐) have any of the following problems or undesirable qualities? Read Categories.

- |   |                             |
|---|-----------------------------|
| 1 <input type="checkbox"/> Neighborhood needs improvement/s   |                             |
| 2 <input type="checkbox"/> House is too big or certain rooms are unused                                     |                             |
| 3 <input type="checkbox"/> Too much work or unable to do all of it  |                             |
| 4 <input type="checkbox"/> House is too expensive to keep up or maintain                                    |                             |
| 5 <input type="checkbox"/> Stairs are hard to climb or other difficult barriers to movement or use of house |                             |
| 6 <input type="checkbox"/> Inadequate facilities (bathing, toilet, heating, plumbing, etc.)                 | 15 <input type="checkbox"/> |
| 7 <input type="checkbox"/> Too far from stores, doctor, church (inconvenient location)                      | 16 <input type="checkbox"/> |
| 8 <input type="checkbox"/> Taxes are too high   | 17 <input type="checkbox"/> |
| 9 <input type="checkbox"/> None of the above  | 18 <input type="checkbox"/> |
|   | 19 <input type="checkbox"/> |

- |   |   |    |
|---|---|----|
| 1 | House needs remodeling                              |    |
| 2 | House needs repairs                                 |    |
| 3 | House needs painting                                |    |
| 4 | Utilities are too costly (heat, water, electricity) |    |
| 5 | Not enough storage space                            |    |
| 6 | Too old   | 20 |
| 7 | Other, PROBE AND SPECIFY _____                      | 21 |
| 8 | None of the above                                   | 22 |

Add total number of housing problems. Use 0-9 for answer. 23 \_\_\_\_\_

Well?, now that I have finished asking you a lot of questions, do you have any you care to ask me about this research project?

Thank you for your co-operation, time, and thoughtful replies. You have been very helpful in facilitating this important research. When the answers of all people interviewed are summarized and written up in the final report, many people should benefit from study of and action on the findings.

## EVALUATION OF INTERVIEW

- Check  
yes \_\_\_ no \_\_\_
1. Do you think that other people should be willing to be interviewed?
  2. Do you think the findings from this research could be helpful to middle aged and older people in planning and living their lives?
  3. Can a research project like this really get at the feelings and thoughts of people interviewed?
  4. Would you rather have been interviewed with your (husband)(wife) present all of the time?
  5. Has there been anything bothering you today or lately that influenced your answers to the questions?
  6. Have you had any difficulty hearing the questions?
  7. Do you see well enough to read the questions and answers?
  8. Generally speaking would you say these questions have been difficult to understand?
  9. In your judgment, did some of the questions have too many possible answers?
  10. Before the interview, has today and this week been normal for you?
  11. Did you feel that any of the questions were too personal?
  12. Did you feel anxious or nervous during the interview?
  13. Did you find yourself thinking about other things during the interview?
  14. Did you feel reasonably able to give accurate answers to the questions?

Office Use Only			
3 _____	6 _____	11 _____	13 _____
5 _____	7 _____	12 _____	14 _____

## B. DESCRIPTIVE LETTER ABOUT THE PROJECT TO RESPONDENTS

OREGON STATE UNIVERSITY  
School of Home Economics

Corvallis, Oregon 97331  
April 12, 1967

To All Couples Interviewed:

We welcome you as participants in this research project which has been designed to increase our understanding about home management and family relations during retirement. Your co-operation and thoughtful answers during the interview are very important to the success and value of this scientific study. No one else can play a more vital role or take your place in this research because you are the expert on the way you think about and manage your home and resources.

As in most studies conducted by the professional staff of universities, the answers you give remain anonymous and confidential. Accuracy and frankness combined with an honest presentation of your thoughts and feelings are very important.

Many people want to know what good they will be doing, or how the results will be distributed and used for the benefit of themselves and others. Answers to these important questions are:

1. Knowledge is increased about retirement conditions, related human behavior and needs, and is shared with other retired people and middle-agers planning for retirement.
2. Information gained may be useful to officials and professionals in government and private institutions who want to improve their services, facilities, and opportunities for retired people.
3. Good research stimulates additional investigations which examine unanswered questions or explore new areas of human behavior. Knowledge may replace ignorance. Concepts, hypotheses, and theories are tested and refined. The factors associated with and contributing to satisfactory or difficult human situations are identified and may be controlled.

In short, we may all benefit as members of families, citizens of the community, and professionals engaged in developing and sharing knowledge and skills to improve the environment,

services rendered, and opportunities available for aging and retired people.

If you are interested in the results of the study, please watch for announcements about the report, or check with the Department of Home Management or the library at Oregon State University. We trust that you will feel comfortable and have an enjoyable experience with our trained interviewers.

Thank you for your willingness to be interviewed, time, and thoughtful answers.

Sincerely yours,

Gary D. Hansen, Co-Director  
Study of Home Management and  
Retirement

## C. AUTHORIZATION LETTER FOR INTERVIEWERS

OREGON STATE UNIVERSITY                      Corvallis, Oregon 97331  
School of Home Economics

April 12, 1967

To: Whom It May Concern

This is to verify that the individual named below has been authorized to conduct interviews for a research project sponsored by the Department of Home Management at Oregon State University. He or she is not selling any merchandise or otherwise soliciting referrals for business purposes. The Mayor's Office and Police Department have been informed about this project if you wish to confirm it. You may check the name of an interviewer by calling 754-1171 or 752-5821.

INTERVIEWER \_\_\_\_\_

Sincerely yours,

Gary D. Hansen, Co-Director  
Study of Home Management and  
Retirement

## D. CLASSIFICATION OF TYPES OF MANAGERIAL TASKS

### Routine Managerial

These tasks exhibit one or more of the following characteristics: (1) the task can be accomplished in a single operation; (2) a relatively fixed pattern is established and followed routinely, or; (3) there is an emphasis on physical labor, mechanical processing or maintenance activities.

1. Storing food and other kitchen supplies
2. Setting and clearing dishes from the table
3. Washing or drying dishes
4. Disposal of waste, emptying garbage
5. Washing and drying clothes and linens
6. Ironing
7. Folding and storing clothes and linens
8. Cleaning garage, basement, tool shed, work bench, and outdoor service areas
9. Handling and storing screens, lawn furniture, etc.
10. Sweeping, dusting or vacuuming floors
11. Making beds
12. Promoting and engaging in routine physical exercise
13. Using or supervising the use of prescribed drugs



Complex Managerial

These tasks have one or more of the following characteristics:

(1) alternative choices are available which require planning and making decisions; (2) the task involves a sequence or different levels of related activities; (3) technical skill is required beyond physical labor; and (4) an element of special study, supervision or service is involved.

1. Planning meals and menus for nutrition and enjoyment
2. Preparing and serving the food
3. Mowing, raking, weeding, and fertilizing lawn
4. Maintaining flower beds and shrubs
5. Planting, watering, weeding, and harvesting vegetables, berries, nuts, etc.
6. Major seasonal or annual housecleaning
7. Repair of house, furniture, and appliances
8. Painting inside walls, cabinets, trim, etc.
9. Care of indoor plants or house pets
10. Study of government programs related to personal and family finances
11. Figuring annual federal and state income taxes
12. Maintaining records of income and expenses
13. Preparing the monthly and/or annual budget
14. Making goods of economic value for the home or couple

15. Responsibility for the family estate, the will, and related matters
16. Encouraging and participating in hobbies and avocational activities
17. Engaging in regular recreation, sports, etc.
18. Assuming responsibility for safety and accident prevention
19. Guiding health and hygiene practices in the home
20. Providing personal care of sick or disabled family member and doing more housework in times of illness or disability

### Transactional

These tasks are complex managerial tasks with an additional characteristic of linking the family as consumer or utilizer with other units of the community that provide goods or services.

1. Shopping for, selecting, and buying groceries
2. Comparing, selecting, and buying clothing
3. Obtaining dry cleaning services
4. Driving the car and chauffeuring
5. Obtaining maintenance, servicing, and repairs for the car
6. Shopping for, selection, and purchase of new or used cars
7. Encouraging and participating in religious and church related activities
8. Study, decision, and investment in property, stocks, and bonds
9. Study, decision, and purchase of life, hospital and medical insurance

10. Study, decision, and purchase of car, fire, liability, and other property insurance
11. Paying the bills
12. Making business phone calls and writing letters
13. Signing and cashing income checks and making bank deposits
14. Earning money through gainful employment
15. Voting, participating in civic affairs, being a citizen
16. Engaging in volunteer, charitable or community service work
17. Encouraging and obtaining regular physical examination
18. Obtaining medical and dental care as needed
19. Deciding on hospital, nursing home or other facility necessary

### Inter Personal

Interpersonal tasks are those which have particular social and or psychological consequences for maintaining or strengthening marital, family, or social relationships.

1. Assuming leadership in household and family affairs
2. Showing concern for and listening to companion's problems
3. Writing letters or calling children or grandchildren
4. Expressing respect, appreciation, and love for companion
5. Visiting children or grandchildren
6. Giving encouragement and moral support to companion

7. Planning special family events (i. e. picnic, reunion, trip)
8. Visiting with neighbors and friends
9. Receiving and serving as host/hostess to guests, entertaining
10. Stimulating mental activity, thinking, and intellectual pursuits
11. Initiating and participating in social activities

## E. COMPONENTS AND ITEMS FOR THE MEASUREMENT OF PERCEIVED MANAGERIAL COMPETENCE

### COMPONENT A -- Underlying determinant factors

1. Deciding on what is most and least important, first or last, and establishing priorities.
2. Setting standards and guidelines for work and conditions of the house, such as for cleanliness and order.
3. Establishing immediate objectives and long range goals.

### COMPONENT B -- Collecting and analyzing information

4. Obtaining, studying, and applying facts and other objective information from professional, educational or scientific sources.
5. Obtaining, evaluating, and using ideas and suggestions of a companion, other family members or friends.
6. Identifying alternative choices or approaches to decisions or problems.

### COMPONENT C -- Planning and decision making

7. Thinking about and planning for the future.
8. Making appropriate and rewarding decisions.
9. Budgeting money--the planned distribution and use of financial resources.
10. Recognizing problems that exist, identifying the real issues, and analyzing the different aspects of problems and issues.

### COMPONENT D -- Assessing human resources and interpersonal skills

11. Being aware of and accepting the skills and limitations of others.
12. Being alert and responsive to the interests, needs, and problems of others.

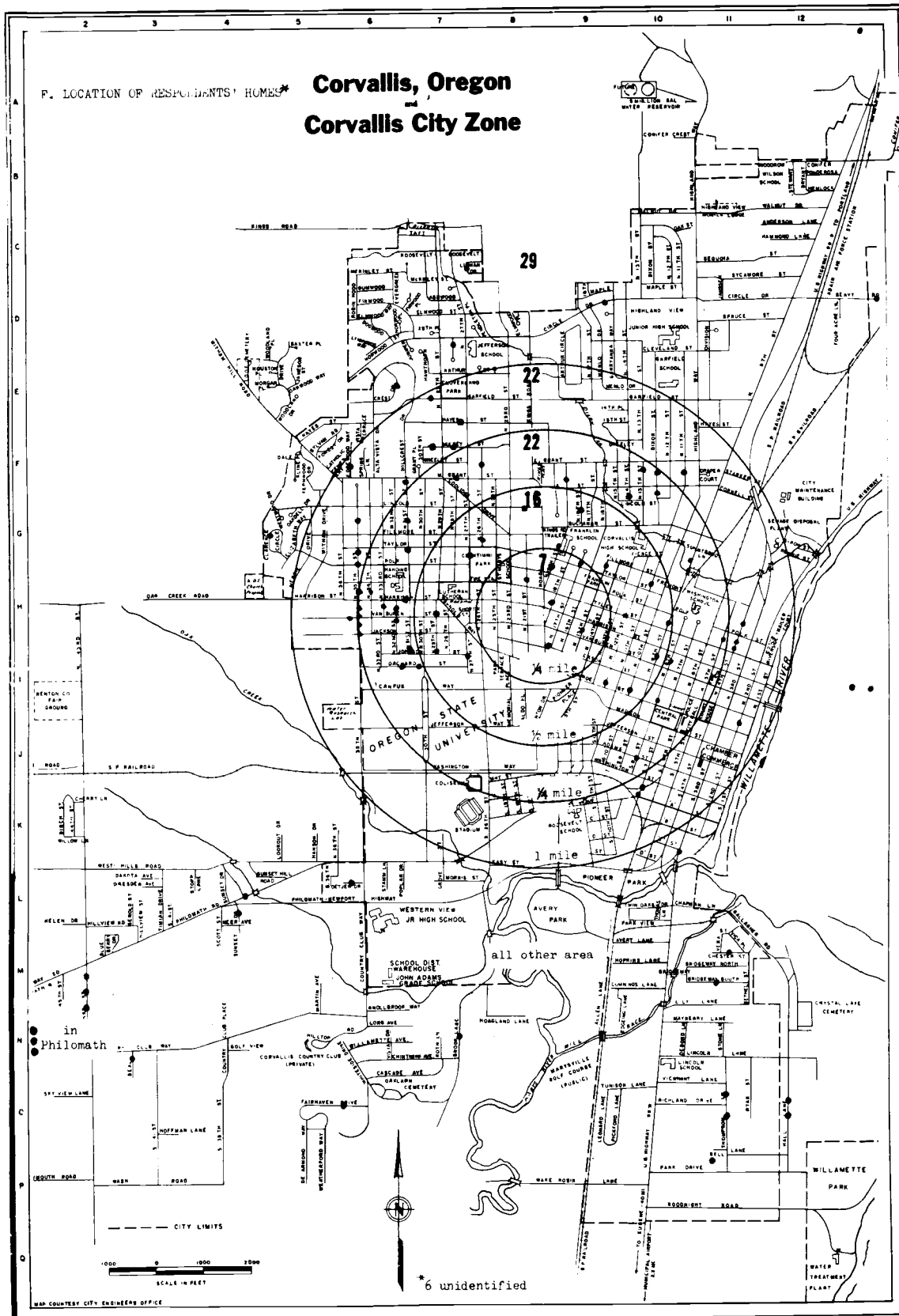
13. Encouraging and stimulating creative thinking and productivity in others.
14. Assigning, authorizing, and sharing work.
15. Providing leadership and guidance to other family members.
16. Awareness of and providing recognition for the efforts and supportiveness of others.
17. Obtaining and making the best use of the knowledge and skills of others, as needed.

COMPONENT E -- Implementing and coordinating

18. Effective completion of routine tasks and regular work.
19. Getting jobs done through organized effort such as by bringing people, resources, and tasks together.
20. Maintaining time schedules, sequences of work, and other activities that are satisfactory to you and others.
21. Carrying special plans out, accomplishing non-routine tasks and activities.

COMPONENT F -- Evaluating, adapting, and redirecting

22. Changing plans, methods or resources when you or others find them unsatisfactory or unworkable.
23. Flexibility to change or adapt to the unexpected or unusual (such as financial crisis, sickness or unanticipated help).
24. Using special techniques or equipment to simplify work, reducing the time or energy it requires.
25. Evaluating how well tasks are accomplished.



G. DISTRIBUTION OF FORMER OCCUPATIONS OF RETIRED MEN  
IN CORVALLIS AND AURORA ACCORDING TO  
THE NORTH-HATT SCALE\*

<u>Corvallis Number</u>	<u>Aurora Number</u>	<u>Examples of Occupations for Each Score</u>	<u>Score</u>
8	0	College Professor Scientist	89
1	0	Government Scientist County Judge	88
1	0	Head of Dept. in State Government Minister	87
5	0	Architect, Chemist, Dentist, or Lawyer Member of Board of a Large Corp. Nuclear Physicist	86
3	0	Civil Engineer	84
5	0	Accountant for Large Business Biologist Musician in Symphony Orchestra	81
2	0	Author of Novels Captain in the Regular Army	80
4	0	Building Contractor Economist Instructor in the Public Schools	79
8	0	Public School Teacher	78
3	0	County Agricultural Agent Railroad Engineer	77
7	9	Farm Owner and Operator	76
1	0	Radio Announcer	75
1	1	Newspaper Columnist Owner of Printing Shop	74



<u>Corvallis Number</u>	<u>Aurora Number</u>	<u>Occupation</u>	<u>Score</u>
4	1	Electrician Trained Machinist Welfare Worker	73
1		Undertaker	72
5	1	Manager of a Small Store in City	69
10		Bookkeeper Insurance Agent Tenant Farmer Traveling Salesman	68
3		Playground Director Policeman Railroad Conductor	67
2		Mail Carrier	66
8	2	Carpenter	63
		Automobile Repairman	
	1	Plumber	
2		Garage Mechanic Local Official of Labor Union Owner of a Lunch Stand	62
5		Corporal in the Army Machine Operator in a Factory	60
1		Clerk in a Store Fisherman Who Owns His Boat Streetcar Motorman	58
		Milk Routeman	54
2		Restaurant Cook	
1		Truck Driver	
5		Farmhand	

\*The source used for this scale was The Handbook of Research Design and Social Measurement edited by Delbert Charles Miller.

## H. SUMMARY OF CROSS TABULATIONS

	Community of Residence	Husband-Wife Disagreement	Increased Task Involvement	Interview Evaluations	Managerial Tasks (63)	Perceived Managerial Competence
1. Age				X		X
2. Anomia	X	X	X	X		X
3. Close personal friends	X					
4. Education	X			X	X	X
5. Family and social contacts	X					
6. Hours employed					X	
7. Housing problems	X					
8. Income		X	X	X		X
9. Illness-disability	X	X	X	X	X	X
10. Interview evaluations	X			--		
11. Living children	X					
12. Net worth						X
13. Occupational rating	X			X		X
14. Perceived managerial competence	X	X	X	X		--
15. Quality of task performance		X	X			X
16. Retirement preparations	X					
17. Life satisfaction	X	X	X	X		X
18. Self image						X
19. Sex (Male-Female)	X		X	X		X
20. Social participation	X					
21. Years retired	X	X	X		X	X