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The emergence of sociological theorizing in the field of aging is described as a sequence of two transformations in gerontological thinking. Each transformation signals a principal change in the conception of the nature and practice of gerontological inquiry. The first transformation was marked by Cumming and Henry's book *Growing Old: The Process of Disengagement* (1961), in which a formal theory of aging is laid out for the first time by social scientists. This set the stage for the development of a range of alternative theoretical challenges. There is a second transformation that began in the late 1970s and early 80s which involved not so much the recognition of theory as a reflection of that recognition itself, being metatheoretical. The issues raised represented a fundamental concern with the so-called "facts" of aging themselves, focusing on the socially constructive and ideological features of age conceptualizations — social phenomenological and Marxist concerns, respectively. More recently (in the late 1980s and early 90s), social gerontologists have turned to critical theory and feminist perspectives to also examine these issues.
Key Words: Theory, Aging theory, Sociological theory, Sociology of aging

Tracing the Course of Theoretical Development in the Sociology of Aging[1]

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The purpose of this article is to trace the course of theoretical development in the sociology of aging as a sequence of two transformations in gerontological thinking. Each transformation represents something new — new modes of self-consciousness — in terms of the nature and practice of gerontological inquiry. The first transformation began in the year 1961 with the publication of Cumming and Henry's book *Growing Old: The Process of Disengagement,* in which a formal theory of aging is laid out for the first time by social scientists. While the book specifies a particular theoretical point of view — disengagement theory — as an alternative explanation for the process of growing old and its impact on the conduct of the elderly, it is perhaps more important in its contribution to theoretical development in gerontology in general. It represents the first public statement wherein theory in aging is treated as a form of scientific activity in its own right, separate from practical applications, information gathering, and policymaking. The explicit emergence of theory as a distinct activity transforms, in a qualitative sense, the conduct of what it means to do gerontological research.

While the development of disengagement theory signaled the beginning of theoretical consciousness in social gerontology, this does not mean to suggest that implicit theorizing did not exist in and about a "field of aging" prior to 1961. Indeed, there is ample implicit "theorizing" about the elderly in the aging literature, mostly underpinning a variety of attempts to explore personal adjustment to aging. Yet, the theorizing is always casual. It is discoverable only after formal theoretical concerns started gaining the attention of gerontologists.

There is a second transformation, begun in the late 1970s and early 80s, that challenges formal theorizing itself, and presents another qualitative leap in gerontological thinking. The transformation, in this case, is not one of general theoretical emergence, but rather commentary on theory as such, being metatheoretical. The questions raised have taken two forms: (1) What is the nature of the reality being theorized about, that is, what is the nature of age and how can it be described; and (2) Whose interests are served by thinking of age in particular ways — social phenomenological and Marxist concerns, respectively. More recently (in the late 1980s and early 90s), social gerontologists have turned to critical theory and feminist perspectives to also address these issues.

In this article, we analyze the development of thinking in the field of aging as a sequence of the two transformations in social gerontological theorizing (Lynott, 1987; Passuth & Bengtson, 1988). Specific theoretical approaches will be examined as they align themselves around these two major markers. While we will argue that there have been these two significant "breaks" in the emergence of thinking in this area, we are not suggesting that each break represents a transformation of all theorizing along the same lines. The breaks represent something new — new modes of self-consciousness — not an announcement of some kind of paradigm shift in definitions of and thoughts about age and aging (Kuhn, 1962). Clearly, at any point in time in the course of these developments, there is explicit and implicit

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theoretical activity that typifies the activity characterizing the level of theoretical self-consciousness of other periods. For example, there is presently a good deal of implicit theoretical work and research concerned with the personal adjustment of older people. Indeed, a survey of what is being done in the name of thinking about aging would reveal all kinds of efforts, from the "typical" practitioner-oriented concerns of the 1940s and 50s, to the variety of theories of the first transformation, including the widespread interest in cohort analysis as part of the life-course perspective (see, e.g., the recent symposium on the life-course perspective in *The Gerontologist*, April issue, 1996), to the more radical challenges to age conceptualizations that, generally speaking, make up the second transformation.

Social Gerontological Theory Before 1961

Prior to 1961, the sociological literature in the field of aging was organized around the concept of adjustment. While the concern of sociologists in this period (forties and fifties) later came to be called activity theory, it was not evident as such at the time. The term "theory" was largely absent in the literature, as well as what would follow from that usage, "theoretical alternatives." Because theory as such was not in the conscious forefront of sociological research, concern largely centered on the object of an implicit, unidimensional way of thinking about aging. Best represented by two key works, Cavan, Burgess, Havighurst, and Goldhamer's *Personal Adjustment in Old Age* (1949) and Havighurst and Albrecht's *Older People* (1953), the central conceptions were "adjustment," "activity," and "individual life satisfaction."

These concepts were understood to be a working language describing the central process of growing old. They were not part of a formal theoretical system whose major problem was whether or not it provides an adequate explanation of aging. Rather, the concepts were treated as descriptions of the "facts" of growing old. For these researchers, who were very practically oriented at the time, growing old meant that individuals encountered problems of adjustment due to role changes in later life. Growing old was a process whereby individuals — not social systems, structures of domination, or ideologies — hope to alter themselves in some way to deal satisfactorily with their experiences. The problem was not retirement, poverty, ill health, and/or social isolation per se; these were the conditions, seemingly "natural" ones. Being natural, they were accepted by the researchers as the way things were, the facts of elderly life.

Consider the intellectual orientation of researchers in the field of aging prior to 1961. The object of interest, for them, is an elderly person who, upon experiencing the "facts" of aging (e.g., retirement, role loss, death), begins to experience an alteration in his or her definition of self. In a world where an activity-oriented, work-related lifestyle serves as a standard of well-being, the elderly person begins to be dissatisfied with life. The reason why individual elders grew dissatisfied is that they were experiencing, in Cavan and associates' (1949) words, "maladjustment," or "unadjustment." The recognition of the sources of dissatisfaction provides a means for readjustment, the sources being a changing, inadequate style of life. In other words, the problem of aging lies in an individual state of living that no longer conforms to the ideal of adjustment reflected in the standard envisioned by these researchers.

The solution to the problem of aging involves readjusting one's life to reflect the standard. The adjusted person is one who takes on a large number and variety of "productive" roles. Thus, it is suggested, on the basis of what are discovered to be the correlates of life satisfaction, that adjustment is the result of variables such as church attendance, hobbies, and membership in voluntary associations, among other forms of personal involvement (see Cavan et al., 1949, pp. 149–159). Without mentioning this normative definition of role, the researchers predict that the more active the person, the greater his or her life satisfaction or adjustment in late life.

Maladjustment, low morale, and life dissatisfaction are defined in opposition to the standard for successful aging; whatever does not "fit" makes for an undesirable old age. The resolution is a matter of elderly persons virtually picking themselves up by their bootstraps and putting their lives in order. Provision was made, of course, for the possibility that elders might need help in this regard (Cavan et al., 1949). This was to be located in the aid of what was then a relatively underdeveloped but soon to be virtual "army" of service providers, whose ideas about social pathology fit the scheme of things very well (Mills, 1943). And, still, it was the individual who was responsible for making good on the services, taking advantage of the opportunities they provided.

From Cavan to Havighurst, among others in this period, researchers were writing about aging as an individual social problem. The implicit sentiments of the researchers dealing with individual membership in the social order, embracing the moral obligation of self-realization through hard work, reveals, in the data, its mirror image. What these researchers discover to be the nature of aging — individual unadjustment and life satisfaction in readjustment — has its source in their implicit "theory" of the nature of growing old. Their work and data reproduce the vision. What is characteristic of this period is that there is little or no clue that these researchers are aware of this connection, something which is not to be fully realized until the emergence of the texts that mark the second transformation.

The First Transformation

The year 1961 represents not only a concrete theoretical challenge to what is for the first time called activity theory, but also the emergence of theoretical consciousness in the field of aging. The approach put forth by Cumming and Henry (disengagement theory) shifts the focus of attention away from the individual to the social system as a source of explanation.

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Informed by Parson's (1951) social systemic theorizing, Cumming and Henry argue that aging cannot be understood separate from the characteristics of the social system in which it is experienced. Taking aging to mean an inevitable process of individual decline, the authors ask how this affects the needs of social system functioning. In order to be a viable one, a social system requires its work to be done expeditiously and efficiently, work interpreted in its broadest sense. While Cumming and Henry do not offer us a typology of spheres of work as Parsons does (e.g., adaptive, integrative, and goal-attainment work), they do state that as persons age, they present a systematic "drag" on societal functioning. Thus, whatever type of work they do, they do it less well as they age. A social system, therefore, must provide itself with some mechanism for dealing with the problem of aging.

The social system deals with this by institutionalizing mechanisms of disengagement. Cumming and Henry (1961, p. 14) describe disengagement as "an inevitable mutual withdrawal" between the aging person and society. Being what Gouldner (1970) calls an "eager tool" of the system, Cumming and Henry's individual takes it as his or her obligation to disengage for the benefit of the social order of which he or she is a part. In contrast to activity theory, the actor in disengagement theory is a complete member of his or her society, a dutiful sentry for system equilibrium. Through the internalization of norms and values, persons become fused with society, being parts of, and not individuals in, social systems. One does not confront his or her society, participate in it as a member of some self-interested segment, nor dramaturgically manage his or her affairs in it. Rather, what exists in social life are systems of role-players, articulating the functional needs of the wider system of which they are a part.

While, on the one hand, the disengagement theorists were decidedly not talking about individuals, they were still, on the other hand, concerned with individual adjustment and life satisfaction. The process of disengagement is portrayed as a gradual one, with continued withdrawal in later life the hallmark of success. In carrying out behavior which is normatively prescribed, older persons aim toward becoming more and more "settled" in old age. The system is responsible for moving them along. To the extent this is achieved, society remains in a state of equilibrium. To the extent this is not achieved, it represents a dysfunctional infringement on system maintenance. It is, therefore, the system's, or society's, duty to correct the problem, entailing nonpurposive, evolutionary system adjustment. In effect, the system's long-term equilibrating needs stand as its own system of adjustment. Accordingly, it is system adjustments and readjustments, in a general disengagement process, that sustain the norm, something which, in turn, spawns satisfied individuals.

Needless to say, the publication of this direct challenge to activity theory generated considerable controversy in the field of aging (see Hochschild, 1975, 1976, for a review of this debate). The theoretical controversy was self-conscious only to the extent that its varied factions challenged each other over the explanatory robustness of the two points of view. Activity theorists, especially the symbolic interactionists (e.g., Rose, 1964), referred to the idyllic, unreal qualities of the disengagement argument. They also brought to bear data which showed repeatedly that individuals resented forms of disengagement like mandatory retirement and other age-related exclusionary policies. Furthermore, data were marshalled to show that older workers were not necessarily less efficient than younger ones. All in all, though, the challenge remained at the individual level, in that the activity theorists brought individualistic data to bear, not social structural arguments, against the disengagement theorists.

On the other hand, in defense of disengagement theory, it should be mentioned that the disengagement theorists were not dealing with individuals. Indeed, as Parsons and other functionalists would argue, the individual articulation of what they consider to be a feature of aging roles within a social system is another matter. In fact, on a number of occasions in their writing, Cumming and Henry argue that at the individual level, considerable variation in the disengagement process occurs. Cumming (1963) goes so far as to offer a psychobiological explanation for individual variations in disengagement, in a theory of temperament.

Because theory was being debated in terms of explanatory robustness, it was taken for granted by both activity and disengagement theorists that the objects of their concern were identical. Yet, the two theories were actually referring to two different things, activity theory about individuals and disengagement theory about social systems. To bring individualistic data, on the one hand, or social systemic data, on the other, to bear in defense of either position is empirically inappropriate. In effect, different realities were at stake for the two points of view, the realities being implicit empirical/epistemological products of their different visions of aging. Each theory had a different understanding of the problem of aging and interpreted concrete observables accordingly. This was not to be realized until after the second transformation, whereupon the relationship between objects of research and the researcher was open to question.

Perhaps the more important contribution of disengagement theory in terms of the evolution of thinking in the area of aging is that it made the field aware of theory — indeed, retrospectively discovering activity theory itself. Besides the activity/disengagement theory controversy, a number of alternative theoretical viewpoints emerged, each claiming to better explain "the data" than the other. The symbolic interactionists, mainly at Rose's (1965) behest, focused on social variations in the meaning of age as they affected individual self-assessments of others' definitions; this was organized primarily around the concept of "subcultures" of aging. Rose argues that behavior, whether of elderly persons or others, cannot be evaluated in terms of some overall

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social standard or norm, but rather is appreciated or devalued against the background of expectations to which its members belong. A subculture of age provides a collectively representative source of personal understanding and self-evaluation, specific to its members' unique characteristics.

Dowd (1975) offered his challenge to the activity and disengagement perspectives (aimed especially at the latter) in the form of exchange theory. He focused primarily on the question of *why* older people, for the most part, withdraw from social life. Informed by Homans (1960) and Blau (1964), Dowd presents an image of age and social integration built on a cost-benefit model of social participation. In contrast to the disengagement theorists, he maintains that the withdrawal and/or social isolation of elderly people are not the result of system needs or norms of mutual consent but, rather, of an unequal exchange process between elderly persons and other members of society.

Dowd (1975) argues that, as persons age, their conduct presents a burden to ongoing interaction with others. It takes greater and greater effort to supplement an individual's shortcomings in a style taken for granted by one's co-participants. With each attempt to maintain a prior lifestyle, an individual's contribution to it, with decreasing competence, shortchanges what others get in return. On the one hand, the elderly person confronts the cost of growing dependence and compliance; on the other hand, others experience the cost of a growing burden of support. The balance of interactions existing between the elderly and others holds the key to personal satisfaction. Individual adjustment in old age hinges on the immediate economy of costs and benefits that exists between persons. A principle of distributive justice — the balance of contributions and rewards — comes into play in aging such that, as elders find they can make fewer contributions because of decrepitude, they experience a decline in power at not being able to justify social returns. Consequently, they begin to disengage in order to balance the exchange equation.

Cowgill (1974; Cowgill & Holmes, 1972) presented another challenge in his modernization approach, arguing that the high status accorded the elderly in past societies has declined due to changes associated with industrialization. Like disengagement, modernization theory is influenced by functionalism. However, while the former emphasizes the normative features of social order, the latter focuses on structural/comparative factors, concern centering on the analysis of various societies at different stages of development. Accordingly, the status of elderly persons for modernization theory, in contrast to that of disengagement, is connected to history, to the timing of modernization. While disengagement theory acknowledges variations in forms of withdrawal that differ culturally, all, in time, eventually do disengage. Modernization theory, on the other hand, sees a direct link between the rapidity of social change and the position of the elderly.

Cowgill (1974) argues, in particular, that each of his four salient variables — health technology, economic technology, urbanization, and mass education — instigates a process wherein elderly people, as a whole, become increasingly dissatisfied. Consider, for example, the health technology factor, as it sets in motion a linear, straightforward sequence of events leading to lower status for the elderly. The process begins with increased longevity of older people. This, combined with the lowering of the birth rate, results in the aging of the population. The greater proportion of older people causes intergenerational competition in the work place, which leads to elderly persons being forced out, thus decreasing their status. The other three variables (economic technology, urbanization, and education) similarly trigger their own sequences of events, all ultimately resulting in the elderly's falling status. (While Cowgill ties social status in old age to elderly persons' relations to changing modes of production, his modernization approach is not a political economy of age, since it does not emphasize class dynamics as the force behind the changing status of the aged; rather, the emphasis is on evolving systems of age statuses rooted in technological advances.)

A different type of theoretical challenge was presented by Gubrium (1973) in his socio-environmental approach to aging. His theory attempted to bridge the gap between the activity and disengagement points of view. He suggested that the theories were too narrow in not taking into account what the meaning of activity or disengagement (nonactivity) was for those concerned. While activity theorists assumed that activity was a valued conduct, disengagement theorists took the opposite point of view, interpreting value in terms of system needs. Gubrium argued, on the other hand, that in some environments activity may be valued while in others devalued. Depending upon a person's individual activity resources (health, financial solvency, social support), as well as the norms in a given environment for interpreting them, there are either positive or negative consequences for life satisfaction (see also Kuypers & Bengtson, 1973).

Another challenge stems from the work of Riley and her associates (Riley, 1971; Riley, Johnson, & Foner, 1972) in their age stratification approach. The authors describe age stratification in terms of differential age cohorts, arguing that the individual experiences of growing old can be understood in terms of one's placement in the age structure. Treating social structure in a Mertonian fashion, Riley and associates state that an individual's location within a given age cohort determines his or her social allocation of roles, forming his or her beliefs or actions. Their interest is in statistically contrasting the social and psychological characteristics of various cohorts historically in order to display cohort-related variations in them (see also Elder, 1974, 1975, for a similar approach called the life-course perspective).

The age stratification approach challenges the activity and disengagement theories by adding a structured time component to it. In effect, Riley and associates would argue that an older person's evalua-

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tion of life cannot be understood as simply a matter of being active or not. Rather, it is changes in the system of age stratification that will influence how experiences affect satisfactions. For example, it has been argued that, as elderly people age, they become more parochial in their thinking, preferring more conservative lifestyles and taking a reserved view of political and economic change. While much data have supported the proposition, Riley and associates would maintain that this may indeed be a cohort effect. If age experiences were stratified into age cohorts, the foregoing support might only apply to a particular one. And, at some other historical times, for some other cohorts, the relationship could be reversed. Likewise, higher standards of education, while lowering the status of elderly cohorts at one point in history, may make future age cohorts more compatible, or even reverse the relationship between education and aging.

While not presented as a formal theory of aging, Atchley's (1971, 1972) continuity approach challenges the unidimensional and global views of both activity and disengagement theories. This perspective argues that individuals are inclined to maintain a consistent line of behavior as they age. Accordingly, it is not the particular level of activity per se that determines one's life satisfaction in later life but, rather, how continuous current activities (lifestyles) are with earlier ones. Successful aging hinges on continuity in one's lifelong experiences, what one has become accustomed to as personally normal.

The theoretical challenges posed to activity and disengagement theories introduce a variety of social and historical factors into the understanding of personal well-being. Yet, they are all strikingly similar in that each of them largely focuses on the individual, or groups of individuals, facing a social world and the resolution of the problems encountered in some form of adjustment (Olson, 1982). The developments which occur in the second transformation in social gerontological theorizing change the focus of attention away from attempting to explain the individual's success at aging, to addressing the objects of old age themselves (e.g., roles, the person, life satisfaction) as topics in their own right. They are conceived as a byproduct of other social forms or processes. For some, they are ideological; for others, they are social constructs.

The Second Transformation

In and about the late 1970s and early 80s, a number of works appeared in social gerontology which were taking fundamental issue with the so-called "facts" of aging themselves, reflecting an earlier development in the field of sociology in general (see Gouldner, 1970). While at rather opposite poles in their form of analysis, arguments arose from both social phenomenologists and Marxists claiming that the approach, interest, orientation, and other subjective features of the researcher and his or her world were significantly connected to the nature of data as such. In effect, the data or facts of aging had no discernable features separate from the understandings of those for whom they were data. The self-consciousness involved was not so much the recognition of theory as a reflection of that recognition itself, being metatheoretical.

Borrowing primarily from the works of Schutz (1967, 1970) and Garfinkel (1967), the social phenomenologists (Gubrium & Buckholdt, 1977; Gubrium & Lynott, 1983, 1985; Hochschild, 1976; Lynott, 1983; Starr, 1982–1983) "bracket," or set aside, belief in the reality of age and age-related concepts and examine the process by which they are socially constructed. The analysis focuses on the social organization of discourse (as a means of describing the time-related features of personal human conduct), showing how members collectively negotiate a sense of age and aging about persons through talk and interaction. Following this, it is argued that developmentally informed theorizing, or related forms of gerontological thinking, in their concrete application, produce the "facts" of aging that, upon their inspection, reveal them to the observer as realities in their own right — a process of "objectification."

The social phenomenologists have criticized theories of aging, in general, for taking the existential status of age for granted, all of which assume a prior and objective existence of life change that has some sort of effect on persons, in a more or less positivistic fashion (Durkheim, 1938). While the theories look at variations in the meaning of age and aging behavior along, for example, historical, cohort, and exchange lines, the variations are accepted as background factors operating upon the aged. Such theories treat the subjects studied as more or less "subject to" the variety of conditions, forces, and other social facts of their everyday world. The interpretation of the so-called forces and their continuing reinterpretation, in the ongoing practice of everyday life, is ignored.

The metatheoretical feature of the argument is that language has an intentional quality (Schutz, 1967, 1970), such that its use serves to construct a reality for subsequent observation. Being set, background factors and/or the conduct of elderly persons themselves, as studied by gerontologists, tend to reproduce the existing relationships envisioned. Whatever "the facts" of aging may be, they are articulated with the researcher's sense of reality at stake. As Garfinkel (1967) would put it, each of the varied approaches to the aging experience produces a body of data that is a byproduct of its own documentation.

Approaching theories of aging as reality-defining understandings does not mean that they are fictive. Theories, like any form of explanation, are not simply labels, but have concrete empirical referents. There are, after all, objects in the world that do exist. Yet, for the phenomenologists, it is the meaning of the objects of experience that is critical. While, for example, it can be pointed out that there are those in late life who experience the withdrawal from roles previously held, what it means to withdraw is entirely different depending on how it is framed, the "factual" status of withdrawal assigned accordingly (Lynott, 1987). In this respect, there are no straightforward facts concerning

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any aspect of the aging experience. Rather, facts enter into ongoing practical experiences as more or less useful ways to understand the variety of age-related conditions under consideration.

Instead of asking how things like age cohorts, life stages, or system needs organize and determine one's experiences, the phenomenologists turn the question around and ask how persons (professional and lay alike) make use of age-related explanations and justifications in their treatment and interaction with one another (see, e.g., Gubrium and Wallace, 1990). Facts virtually come to life in their assertion, invocation, realization, and utility. From this point of view, language is not just a vehicle for symbolically representing realities; its usage, in the practical activities of everyday life, is concretely productive of the realities. Accordingly, to the extent a form of discourse becomes institutionalized (becomes the organizing principle of a variety of formal activities), objects become systematic productions and reproductions of their application to human affairs (see Filmer, Phillipson, Silverman, & Walsh, 1972). The analysis focuses attention on the process by which age, agedness, and age-related "facts" are produced and reproduced in the first place, a concern for the social construction of fact, or facticity (Raffel, 1979).

This approach has been used by Gubrium and Lynott (1983) to examine one of the central "facts" of concern to gerontologists, the life satisfaction of elders. Investigating the language of the most commonly used life satisfaction measures, analyzed thematically, the authors argue that the image presented in the various measures frames respondents' descriptions of their experiences of life, in terms of a clock-time metaphor (Hendricks & Hendricks, 1976). They argue that to ask elders to represent their lives in a chronologically linear fashion is to ask them to interpret their life experiences accordingly. To the extent that they do so, they produce a developmental understanding of their experiences.

Taking from Garfinkel (1967), the authors ask what the facts are of life satisfaction on the occasion of its measurement. Life satisfaction researchers (like survey researchers in general) have taken the interview situation to be neutral, virtually nonsocial. But do respondents consider it likewise? For them, it is a situation that, by request and acquiescence, calls out an interview-appropriate set of interpretations of their experiences, ignoring the practical, "it depends" quality of experience that enters into consideration (Gubrium & Lynott, 1987; Lynott, 1983). As such, that world produces a display of a given respondent's "total" life in its own fashion.

But, as Gubrium and Lynott (1983) show, other occasions, too, serve to display members' total lives, but in their own ways. The authors' use of a variety of old age ethnographies, together with a serious concern for the situated features of experience, challenge the "facts" of life satisfaction on the occasion of its measurement. They offer evidence of another vision of experiential interpretation, one entailing worlds upon worlds of time construction, time reversibility, time multiplicity, and their complications. Their use of ethnographic data reveals the occasioned and constructed features of life satisfactions, presenting us with a multifaceted view of the aging process.

What Gubrium and Lynott (1983) are arguing is that, one feels old or not, behaves elderly or not, feels satisfied with life or not, depending upon the "background expectancies" (Garfinkel, 1967) or relevant worlds serving to interpret later life experiences. Their analysis, like the social phenomenological approach in general, shows that the potential realities assigned to the aging experience are the products of an ongoing process of social construction, descriptively organized by prevailing stocks of knowledge (Schutz, 1967, 1970). At the same time, this approach tends to leave off its analysis once the human products of the process have been produced, considering the product not as a configuration of social conditions independent and perhaps confronting members, but rather in terms of its production and reproduction — a concern for structuration rather than structure (Giddens, 1976).

Another source of the second transformation is a concern for the political economy of aging (Estes, 1979; Estes, Gerard, Zones, & Swan, 1984; Guillemard, 1983; Myles, 1984; Olson, 1982; Phillipson, 1982; Quadagno, 1982, 1988; Walker, 1981). In her book, aptly entitled, *The Aging Enterprise* (1979), Estes states that aging is not a mere condition of growing older, but must be understood as a business. She argues that the facts of aging can be located in the political economy of growing older. The "facts" of aging, in a capitalist society, are part and parcel of the work requirements of a labor market controlled by the needs of industrial development. This approach is contrary to other theories of aging, which largely "focus on what old people do rather than on the social conditions and policies that cause them to act as they do" (1979, p. 11). For Estes, the blame for the problem of aging cannot be found in its end-products, the elderly victims. Their experience, she argues, cannot be understood separate from their relation to the mode of production.

Olson (1982) carries the message further. Like Estes, she writes that all preceding formal theories of aging — from activity to disengagement, developmental, socio-environmental, and age stratification — are individualistic and, in her words, "represent attempts to explain existing conditions in terms of individual adjustment" (Olson, 1982, p. 15). They take the form of what she calls either "free-market conservative" or "liberal accommodationist" views of the relationship of the state to its constituency. The metatheoretical feature of the argument is that the theories are more than alternative formal explanations for the so-called "facts" of aging; their political undertones serve to produce *select* facts. In application, through their research devices, they virtually work to establish certain facts which, upon inspection, confirm an implicit but alienating production process.

The analysis envisioned by these approaches sees the problems of old people largely in terms of "their

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private troubles." To apply Mills's (1959) language further, little attention is paid to: (a) the public issue of age and, more importantly, (b) the relationship between public issues and private troubles. Rather than ask what the sources are of private troubles in old age, the common theoretical practice has been to investigate the immediate conditions that might serve to maximize or minimize the troubles — conditions like role loss, social isolation, level of activity, and social support. The structural conditions of the problem are displaced in favor of less threatening causal arguments.

The political economists offer a class explanation for the helplessness of the position of the elderly. They address the troubles of old age in terms of the impact of political and economic conditions on an impoverished collectivity of elders and their relative relations to the mode of production. Consider, for example, the Social Security Act of 1935. Presumably, the benefits of this program were directed toward the interests of old people. As a worker ages and becomes less and less efficient, his or her capacity to contribute to industrial production decreases, or so it is argued. There must be, then, a systematic means for retiring unproductive workers from the labor force (cf. disengagement theory). Yet, it would be undesirable to produce a whole class of disenfranchised members of society. Thus, the social order ostensibly should provide some means of security for this problem.

In contrast, Olson (1982) argues that the history of social security in the United States is the history of the ideological usages of the alleged incapacities of the aged to feed the expansionist production needs of industrial capitalism. It is a means of reserving a pool of labor that efficiently services capitalist production. It is also a means of placating an increasingly restive labor pool that comes with downturns in economic cycles. She argues that the origin of social security was not so much a compassionate interest in the security of the elderly as it was a means of dealing with unemployment, by making the jobs that existed available to the young while appeasing the poverty of retirees. Social security provided just enough means of security to reap the gratitude of an economically and systematically disenfranchised segment of the labor market (see Myles, 1984, for a somewhat different argument).

Consider, too, the Older American's Act of 1965 (OAA), another state-supported means of perpetuating the private troubles of the elderly (Estes, 1979; Olson, 1982). While OAA had the ideal of establishing the independence and well-being of older people, its welfare-oriented articulation further transformed them into a state-dependent class, a welfare class. Its objectives saw the solution to the problem of aging, in application, largely in the local planning and coordination of fragmented recreation-like programs. Rather than make elderly persons, as a whole, economically solvent and independent, individual managers of their own affairs, the process has generated considerable economic expansion, all presumably in the "service" of elders. The army of experts, professionals, and service providers that have arisen to dole out benefits of various kinds to the elderly population have expanded the service sector of the American economy. The net result is a large discrepancy, on income grounds alone, when comparing the income of bureaucrats servicing the elders with the income of the elders serviced. In effect, the political economy of aging serves those who serve the state more than it serves those who are troubled by its conditions.

Another example of the state support of those who benefit in the political economy of aging is the health care system (Estes et al., 1984; Olson, 1982). The medical welfare bureaucracy, in payment for services to largely self-controlled providers of health care like physicians, hospitals, and nursing homes, is a state-supported means of perpetuating the private troubles of the elderly. The economic support that elders receive, while enough to keep them alive, is not enough to alleviate their extreme dependence and poverty, as a result of the minimal benefits. Instead, the health care system produces and expands the panorama of health problems said to be in need of care, which further expands the market for the services of health care providers. In effect, the politics of health care feed on the very target of its presumed concern (Alford, 1976). And all of this is periodically publicized as a problem of critical proportions said to be a current "crisis" in the care-needs of the elderly (see Edelman, 1977).

Given the existing political and economic system, the solution to the problem of aging can only be a matter of patchwork. Even the state attempt to deal directly with such problems as poverty, poor health, and housing is only a limited benefit to the goal of independence (Olson, 1982). The system, after all, serves the interests of those who control it. Therefore, when problems arise, the issue of control is glossed over by the concern for the management of the problem. It is in this sense that much current gerontological theory serves the state, is an apology for the status quo, and justifies the social organization of "help." Olson (1982) offers a more radical solution, one that involves "progressive changes that move society in the direction of democratic socialism" (p. 228). This would necessitate a change in economic structure, to a political economy not centered on the maximization of individual interests but on the maximal benefit of all.

Recent Developments in Social Gerontological Theory

In the past decade, social gerontologists have attempted to apply critical theory and feminist perspectives to the study of aging. Each of these approaches also examines the epistemological and/or ideological features of age conceptualizations. Each, in its own fashion, takes issue with current theorizing in the field.

Drawing on the tradition of the Frankfurt school of thought (see Held, 1980), Moody (1988) has called for a critical gerontology approach (see also Atchley,

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1994; Baars, 1991; Cole, Achenbaum, Jakobi, & Kastenbaum, 1993; Moody, 1992, 1993) in an effort to move beyond, as he puts it, "the impoverishment of theory in social gerontology" (p. 19). Ideally, this perspective would include "theories of aging that contain self-reflexive rules for their construction, interpretation, and application to the life-world" (Moody, 1988, p. 33). This stands in contrast to conventional gerontological practice, which "acts to reify the status quo and provide new tools to predict and control human behavior" (Moody, 1988, p. 33) — a process that reflects what Horkheimer and Adorno (1972) and their critical theory colleagues call "instrumental reason," a type of organizational domination embodying a means-end rationality.

In describing the critical gerontology approach, Moody relies, in particular, on the work of Jurgen Habermas, especially his book, *Knowledge and Human Interests* (1971). The metatheoretical argument presented in the book examines the epistemological relation between the practical use of facts and their objects of concern. In it, Habermas distinguishes three kinds of cognitive interest toward any world of concern, cognitive interests being the general intellectual task orientation taken in describing a world of objects. Asking, in effect, "For what purpose is this knowledge?" he offers three answers, three cognitive interests. One he describes as a technical interest in control. From this viewpoint, with this implicit interest, in distinguishing between "facts" and what they represent, one might be interested in how age-related concepts, in their use, serve to reveal "natural" objective relations between the objects they represent. The state of objects is delineated by variously "manipulating" them in order to discover how they are organized in relation to each other.

Within sociology, Blumer (1956) has referred to a form of this interest as "variable analysis." The aim of variable analysis is to control in two senses: (1) to control variables in order to display their objective organization, and (2) with the knowledge of the organization, to control the organization itself, such as exists in the variety of ways to intervene in social affairs.

Consider what this form of interest would mean with respect to the objects of human aging. As conventionally undertaken, one would gather data on variables like activities, retirement, widowhood, or health status, on the one hand, and on variables such as life satisfaction, social support, or caregiver burden, on the other, and then attempt to trace the relationship between the sets of variables. The results obtained could then be used in support of particular theories or hypotheses. Control lies in the assumption of the objective status of the variables whose objects they name and their consequent manipulation (control) in order to discover their "natural" variations. Once discovered, knowledge of their variation allows one to effectively intervene in the relationship, or at least to suggest alterations, in order to bring about desirable changes (control) in other aspects of the relationship, as a consequence of policymaking.

A second cognitive interest described by Habermas (1971) is an interest in understanding. From this point of view, age-related concepts would be considered, not in terms of how they represent their objects, but in terms of how they produce them. Attention turns away from that which is signified and toward the concepts or signs themselves, as Husserl might put it, "to the things themselves." The question here is, "How are 'things' to be understood?" It is an interest that is prior to control, whose understandings are taken for granted by control interests. One can hardly attempt to study such objects as stages, systems, cohorts, and the like, without taking for granted their existence in human affairs. It is precisely on that assumption that an interest in understanding dwells. It is an entirely different cognitive interest and organization than the first one, not in any way reducible to it.

The product of research from this viewpoint — as "understandings" — is radically different from "facts" or "data" as products. The latter terms are only reasonable when cognitive interest is in control; the former is reasonable when cognitive interest is in understanding. There is a double sense of the term "understanding" here. One, sometimes called "verstehen," refers to the researcher's discovery of his or her understanding; the other refers to what respondents offer up as their own understandings. Giddens (1976) refers to this as a "double hermeneutic," the interpretation of interpretation.

A third cognitive interest specified by Habermas (1971) is an interest in emancipation. In contrast to the first cognitive interest (i.e., control), this one does not take for granted the separate and objective existence of objects, separate, that is, from those for whom they are objects. Thus, for example, old age, as a thing, is not treated as an entity that is ontologically distinct from those who experience it. It would make no sense, with this interest, to ask how persons enter into old age since the entering itself, in some critical sense, produces old age.

On the other hand, in contrast to the second cognitive interest (i.e., understanding), the interest in emancipation does not as totally bracket the reality of objects in the world in the service of inspecting their understandings. It offers a more concrete vision of objects or social forms, whereby socially constructive subjects come face-to-face with the products of their labor. This is not a contradiction if the relation between subject and object is a dialectical one. The interest is in the process by which, on the one hand, the objects of the world, in this case, the aging experience, get produced by meaningful action and, on the other hand, how these productions are, upon their realization, encountered by actors. From this viewpoint, the human contingencies of confrontation are highlighted, as a moral consideration.

The interest in emancipation arises out of the understanding that all action is productive of objects, and, yet, in the course of human affairs, the source of the objects gets lost. The research task for this cognitive interest is critique (systematic cultural critique)

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and thus theory becomes critical. What is critiqued by critical theorists is not research procedure or the objective state of objects per se; what is critiqued are transformations of the relationship between subjects and objects from being genuine to being alienated. Thus, a major concern for critical theorists, with respect to age conceptualizations and theories of aging in general, would be how they represent a language serving to reify experience as something separate from those doing the experiencing. The aim is to free the subject from objects, to reveal to him or her that the objects of his or her experience are the products of his or her labor, seeking, in principle, to liberate the actor from the ideological conditions of "systematically distorted communication."

In the attempt to apply the arguments of Habermas and the other Frankfurt critical theorists to theoretical thinking in aging, Moody (1988, p. 26) states the following:

> What all of this implies for theories of aging is that such theories cannot be constructed with moral indifference toward the practical horizon of their validation and application in human affairs. Put differently, any theory of aging that settles for *less than* a form of emancipatory knowledge runs the risk that knowledge gained, whether technical or hemeneutic, will be used for purposes that lead not to freedom but to new domination, perhaps a domination exercised ever more skillfully by professionals, bureaucrats, or policymakers.

For Moody (1993, p. xvii), the concern with "emancipatory knowledge" lies in formulating "a positive vision of how things might be different or what a rationally defensible vision of a 'good old age' might be." Achieving this, he argues, involves moving beyond the conventional confines of gerontology and exploring contributions toward theory development from a more reflective mode of thought derived from disciplines within the humanities (see Cole et al., 1993).

Of course, just what exactly a "good old age" means as well as how it actually will be attained is another matter, raising some fundamental epistemological concerns with the approach, including the question of how any type of broad "emancipatory knowledge" is possible given that, as Foucault (1977, 1978, 1980) has so vividly shown, knowledge and power are inextricably linked. For Foucault (1981, pp. 12–13), any emancipation that "is to be done ought not to be determined from above by reformers. . . . The problem, you see, is one for the subject who acts." (This, of course, would apply to all forms of discourse that have been influenced by the Enlightenment tradition [see, e.g., Silverman, 1989]). Moody (1988, p. 27) himself has acknowledged that "we still have no clear account of where that emancipatory ideal is to be found." In spite of this, the incorporation of critical theory into gerontological thinking has the potential to expand critical awareness in the field, providing insight into, and critical self-reflection on, the continuing effort to understand the aging experience.

Another area of inquiry critical of age conceptualizations that has been receiving attention in the past decade is a feminist approach. While the idea of a feminist gerontology has been around for many years (e.g., Troll, Israel, & Israel, 1977), only recently has it begun to be taken seriously. This is not surprising given that the discipline of sociology itself has been slow to embrace feminist thinking, something Stacey and Thorne (1985, p. 306) ascribe to the following three factors:

> . . . the limiting assumptions of functionalist conceptualizations of gender, . . . the inclusion of gender as a variable rather than as a central theoretical concept, and . . . the ghettoization of feminist insights, especially within Marxist sociology.

Osmond and Thorne (1993) emphasize that there are many different feminist perspectives: socialist, liberal, radical, interpretive, psychoanalytic, and postmodern feminism. While each offers a particular explanation as to why women are treated as "other" in society, their common focus is on critiquing the "androcentric" (male-centered) view of conventional sociological theorizing, a criticism which also has been applied to theoretical thinking in aging. Calasanti (1993b, p. 108), for example, points out that, by and large, "gerontological theories are based on the experiences of white, middle-class men." The metatheoretical feature of the argument is that the theories serve to produce select "male facts" (which support their interests), denying women, among others, centrality in the aging experience. (This is not as radically metatheoretical as Habermas' sense of cognitive interest.)

Most feminist theorizing in the field of aging has drawn from socialist feminism (liberal and radical perspectives also have been applied, as we discuss below). The socialist feminists argue that women occupy an inferior status in old age as a result of living in a capitalist and patriarchal society (Arber & Ginn, 1991), a view more recently expanded to include race and ethnicity (Blieszner, 1993; Calasanti, 1993a; Calasanti & Zajicek, 1993; Stoller, 1993). From this perspective, age-related issues such as caregiving and retirement are placed within the context of women's labor throughout their lives, including childrearing, unpaid housework, and the paid labor force. The socialist feminists maintain, for example, that women's history of domestic labor and low wages in the workplace has resulted in them having fewer pension benefits in their old age (especially women of color). Their greater financial hardship stems from a lifetime of disadvantaged employment in a labor market segregated by gender and race. This, coupled with the fact that women generally are viewed as being "natural" care providers, leaves many of them with neither the economic resources nor the necessary social support for managing problems in later life (Stoller, 1993).

The socialist feminists have criticized theory and research in aging for ignoring the history and structure of gender relations. Studies of caregiver stress, for example, conceptualize the experience as largely being a woman's private responsibility, resulting in

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policies (e.g., respite care, home helps, support groups) that, while providing some measure of relief, serve mainly to "promote personal adjustment rather than social reform" (Abel, 1990, p. 83). This type of approach, they argue, leaves unquestioned how existing structural arrangements and their social relationships create women's dependency and obligations in old age, preventing the majority of them from enjoying a variety of opportunities or advantages.

The rewards of a capitalist and patriarchal society, aligned with the relations, do not represent the relative contributions to the system of production. It is, on the other hand, in someone's interest to see economic and gender equality and inequality as a structure of rewards, and thereby legitimize the ongoing relations of production. Therefore, rather than focus attention on what are essentially symptomatic approaches to the problems women encounter in late life, for the socialist feminists, what is needed instead is a major "restructuring of the economic relations between men and women and increased societal recognition and support for the unpaid work women perform throughout their caring careers" (Stoller, 1993, p. 165).

Taking a liberal feminist point of view, Friedan (1981) has argued that the struggle for gender equality in American society needs to move beyond the women's movement to a second stage, in which the major institutions change to accommodate men and women as both parents and workers (e.g., maternal and paternal leave, child-care services). More recently, she has focused attention on the experience of growing old (Friedan, 1993). Friedan argues that widespread negative stereotypes of elderly persons have contributed to an "age mystique," much like "the feminine mystique" for women in the 1950s (Friedan, 1963). The age mystique refers to American society's cult of youth, dread of aging, and assumption that growing old is synonymous with physical, psychological, and social decline, a view reinforced in the portrayals of elderly life presented by the mass media. She also argues that gerontologists, wittingly or not, have fed into this image by conceptualizing old age in terms of its troubles, an orientation that leads to the kinds of research emphasizing problems of disease and disability over more positive depictions of late life.

Friedan (1993) contrasts these negative depictions of aging with descriptions of the experiences of older people who have risen above the stereotypes and are enjoying vital, fulfilling lives in their later years. Akin to her earlier challenges to societal conceptions of acceptable gender roles, she contends that greater awareness of the positive, more "factual" realities of old age would "break through" the age mystique and provide new meaning to the aging experience, enriching the quality of life for both men and women as they grow old.

Copper (1988) has presented a radical feminist perspective to the study of aging, viewing American society as largely misogynist, particularly toward older women, and, as in her case, older lesbian women. She reflects on how younger women themselves, including young lesbian women, share many of the same age prejudices as society in general. She also points out that "social workers, therapists and gerontologists who earn their livings working for agencies that study or serve the old" (1988, p. 95), in order to secure funding, contribute to the oppression of older lesbians by stereotyping them as needy and defenseless, a common practice even among young lesbian professionals. The focus of Copper's argument is aimed at empowering older lesbians by confronting ageism among women, in the hopes of fostering greater understanding and common interests. There has been little additional research from a radical feminist perspective in social gerontology, mainly because research of this kind, to a large extent, has emphasized issues related to men's control over women's bodies (e.g., prostitution, abortion, contraception) which, for the most part, would exclude post-menopausal women.

Feminist theorizing in aging has drawn primarily from socialist, liberal, and radical feminism (see also Ray's article on postmodern feminism in the previous issue [October, 1996] of *The Gerontologist* for the latest development in this area). While each of these perspectives highlights, to one degree or another, women's aging experiences, the latter two, of course, are less radical in their challenges to age conceptualizations. Feminist thinking in general, though, has yet to fully articulate, in one form or another, a theoretical mode of analysis applicable to the aging process.

Conclusion

The purpose of this article has been to trace the course of theoretical development in the sociology of aging as a sequence of two transformations in gerontological thinking. Each transformation signals a principal change in the conception of the nature and practice of gerontological inquiry. The first transformation was marked by Cumming and Henry's book, *Growing Old* (1961). The approach put forward by the authors — disengagement theory — represents the first statement wherein a distinct theory of aging emerges in scientific form. This set the stage for the development of a range of alternative theoretical challenges, each concertedly posing its own interpretation of the facts of aging.

The second transformation, begun in the late 1970s and early 80s, was not so much the recognition of theory as a reflection of that recognition itself, being metatheoretical. The issues raised represented a fundamental concern with the so-called "facts" of aging themselves, focusing on the socially constructive and ideological features of age conceptualizations — social phenomenological and Marxist concerns, respectively. More recently (in the late 1980s and early 90s), social gerontologists have turned to critical theory and feminist perspectives to also address these issues.

In examining the emergence of sociological theorizing in the field of aging, we have focused attention on the cognitive style of the thinker. This approach is

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an alternative to a history organized around the development of differing understandings of the objects of concern, namely, the facts of aging. The latter point of view would have been chiefly concerned with the question of explanatory robustness, that is, the relative explanatory power of various theories of aging (and their subsequent "refinements" [e.g., Riley, 1987, 1994; Riley, Foner, & Waring, 1988]) with respect to a select set of data. While this strategy might have been useful in describing and assessing the details and controversies in the period following the first transformation, it could not have dealt with theoretical developments in the years following the second one, since the major new concern then came to be the dialectical relationship between fact and explanation.

The argument presented is a study in the sociology of knowledge. Whether of aging or some other object of everyday life, "facts" are treated as constituted features of our attention to them. The first transformation provided the awareness of different visions (theories) of the facts, which placed us once removed from their objectivity, allowing theoretical work to be engaged separately from the inspection of the objects which the work is about. With the second transformation, there is the added awareness that the theoretical objects of our attention are, in their essential qualities, always, in certain respects, constitutionally theoretical; this places us twice removed from objects, such that they now become objects-for-us, the interpretation of interpretation (Giddens, 1976). The analysis of these two developments in gerontological thinking reveals that our understanding of the facts of aging not only grows with their accumulation, but with transformations in our self-understanding as well.

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