

Volunteering is viewed as being beneficial for the elderly because it can provide a means of acquiring substitutes for work and family roles. This study questions whether role loss significantly influences volunteering; the findings suggest that other social characteristics, such as socioeconomic status and gender, have a greater influence on volunteer patterns of the elderly.

Key Words: Volunteers, Aging, Activity theory, Retirement

# Is Volunteering A Substitute for Role Loss in Old Age? An Empirical Test of Activity Theory<sup>1</sup>

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Numerous articles in popular magazines as well as scholarly and practitioner journals describe the positive benefits of volunteering for the elderly (cf. Babic, 1972; Einstein, 1973; Grady & Kastetler, 1970; Swartz, 1978). Both the public and private sectors have acknowledged the importance of volunteering by the aged and a number of programs are specifically designed to encourage and to facilitate their involvement (Freund, 1971; Sainer & Kallen, 1972; Sainer & Zander, 1971b; Seguin & O'Brien, 1976; Stone & Velmans, 1980). Programs like RSVP, SCORE and the Foster Grandparents program are generally viewed as having two major functions: to provide individuals with meaningful leisure activities and to provide organizations with experienced and reliable workers at no cost.

Volunteering could potentially fulfill a number of different needs of the aged: to engage in altruistic behavior, to acquire new experiences and skills, or to gain political influence. The literature on senior citizen volunteering emphasizes another function, namely, that it serves as a way of dealing with role loss in old age:

For the older person who has perhaps suffered a loss — retirement from work, loss of peer relationships, death of parents and/or spouse, departure of grown children, or loss of feelings of self-worth and dignity — the opportunity to share and to give service is poignantly valuable. To be able to contribute when one has been reduced to accepting services — an uncomfortable role for many — is most

satisfying. Returning to the nurturing role: sharing one's skills and life experience, and having a destination for which one must dress and leave one's house, can provide the *raison d'être* for an older adult. (Swartz, 1978, p. 87).

The literature suggests that volunteering has a positive effect on the well-being of the elderly because it can compensate for role losses in other areas. The loss or lack of work and family roles is suggested as an important reason for being involved in volunteer work. Such activities would enable individuals to regain the structure and the destination of a paid job (Rosenblatt, 1966) as well as the emotional gratification and social ties of family life.

In view of the current interest in and the policy significance of senior volunteering, it is curious that relatively little empirical research has been conducted in this area and no direct empirical test has been made of the central question of whether volunteering is in fact used as a substitute for role loss in old age. This article considers this question by examining whether individuals who lack ties to work and to family tend to volunteer more frequently and devote more time to volunteering than do those maintaining such involvement.

## Theoretical Perspectives

Discussions of the importance of volunteering for the elderly reflect the influence of activity theory. This theory suggests that the well-being of elderly persons is significantly enhanced by maintaining the activity level of middle age. A higher level of well-being in old age will occur when individuals substitute one role for another. One statement of activity theory argues that

The older person who ages optimally is the person who stays active and who manages to resist the shrinkage of his social world. He maintains the activities of middle age as long as possible and then finds substitutes for those activities he is forced to relinquish: substitutes for work when he is forced to retire; substitutes for friends and loved ones whom he loses by death. (Havighurst et al., 1968, p. 161)

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As stated earlier, volunteering is one way in which such substitution could be achieved. In this view, then, the lack or the loss of significant roles serves as an impetus to becoming a volunteer. If activity theory explains volunteer patterns among the elderly, the following associations would exist:

1. Aged individuals who are not in the labor force more frequently participate in volunteer activities and spend more time doing volunteer work than those who continue to be in the labor force.
2. Aged individuals who are not married more frequently participate in volunteer work and spend more time doing volunteer work than those who are married.

#### Previous Research

A widely cited report of the SERVE Program (Sainer & Zander, 1971b) includes findings which support the work-substitute view of volunteering for the elderly. Over half of the participants originally joined the program in order to enhance their social contacts. Two-thirds were unmarried, and over nine in ten were not working. On the basis of participants' motivations and their work and family status, the authors conclude that volunteering could provide detached senior citizens with the opportunity to substitute for lost social roles.

Comparisons of volunteers and non-volunteers do not consistently support activity theory. Data from the two National Council on the Aging (NCOA) surveys conducted in 1974 and in 1981 show that retirement is not associated with a greater tendency to volunteer (Harris, 1974, 1982). The 1981 study found that 24% of retirees and 25% of the employed had done some type of volunteer work. Volunteers who were retired, however, devoted greater amounts of time to such work than those who were still employed; 5% of the employed and 10% of retirees spent 15 or more hours weekly doing volunteer work.

The findings of three other studies that investigated interest in volunteering rather than actual participation do not support the supposition that volunteering is a work-substitute for retirees. Studies of elderly residents in Buffalo, New York (Monk & Cyns, 1974) and Newton, Massachusetts (Lambert et al., 1964) found that employment status was not related to interest in or willingness to volunteer. A third study, which used a relatively small sample of elderly residents of New York City's lower east side (Rosenblatt, 1966), partly supports activity theory. It found that the greatest level of interest was expressed by those who were not actually working but wanted to work; such individuals were twice as likely to be interested in volunteering (46%) as those who were working (21%), retired (20%), or homemakers (9%).

The studies do not consistently support the view that volunteering is a work-substitute during retirement. Another perspective on aging, continuity theory (Atchley, 1972), has been suggested as a means of explaining volunteer patterns. Some observers suggest that the aged who volunteer are primarily volunteers who have aged; their involvement in

volunteer work is longstanding and either remains constant or expands upon reaching old age. A study whose sample consisted of senior center participants found that the major difference between volunteers and non-volunteers was that the former were joiners, they had had greater involvement in voluntary associations and derived greater enjoyment from belonging to organizations throughout adult life (Dye et al., 1973).

#### Research Method

##### *Description of the Americans Volunteer — 1974 Survey*

This study is a secondary analysis of data from the Americans Volunteer — 1974 survey (ACTION, 1975). Sponsored by ACTION, the data were gathered as part of the April 1974 Current Population Survey. The total sample included 23,830 persons. The 4,339 individuals used in this study include all those aged 60 and over who were not disabled or students.

The decision to use this data set was based on the sample's large size, the fact that it is representative of the U.S. population, and the broad range of questions asked. The interview schedule included detailed information on demographic and social characteristics and current employment status as well as questions on volunteering.

##### *Measures of Volunteer Activity*

Volunteering has been measured in two different ways. The first approach defines it in a restricted manner, as unpaid work within the context of a formal organization or a voluntary association. This was the approach used in our data set. The two National Council on the Aging studies also defined volunteering in a formal manner. The second approach involves a broader definition that includes formal as well as informal activities. Thus, the first approach would consider a friendly visitor, but not a friend who regularly visits, to be a volunteer. The broader definition would consider both to be volunteers.

The definition used greatly affects the percentage of individuals who are categorized as volunteers. The two Americans Volunteer surveys found that 9% of persons aged 65 and over volunteered in 1965 (U.S. Department of Labor, 1969) whereas 14% did so in 1974 (ACTION, 1975). A survey which defined volunteering in both formal and informal terms found that 37% of the aged had volunteered in the 1980-81 period (Gallup, 1981).

Although a detailed discussion of the relative merits of each type of measure is beyond the scope of this article, the implications of using a data set that employs a formal definition of volunteering should be noted. Insofar as volunteering could serve as a work-substitute, the restricted definition is more appropriate; volunteering in a formal organization usually means that an individual has to make a specific commitment, a condition which makes a volunteer position resemble a job. The more restricted



definition is, however, less appropriate when considering volunteering as a substitute for family roles since such roles are not usually played out within a formal organization.

Two measures of volunteering are used in this study:

1. *Volunteer Participation*: All respondents were asked whether they had done any "unpaid volunteer work" during the period between April 1973 and April 1974. They were shown a list of nine types of organizations to illustrate the contexts in which volunteering could take place and were instructed to include work in organizations which were not on the list. Of the 4,339 respondents included in this analysis, 16.4% had done volunteer work during the previous year.
2. *Commitment of Volunteers*: In order to ascertain the respondents' degree of involvement in volunteering during the previous year, individuals were assigned a score using two questions: a) How frequently the individual had volunteered during the past year (e.g., weekly, monthly, once) and b) the total number of hours spent in volunteer work. Since the responses to these questions were coded into four or five categories, the scores range from 2 (volunteered once for 25 hours or less) to 9 (worked on a weekly basis for a total of 300 or more hours). The mean score on this measure was 5.49 for the 644 respondents for whom a score could be calculated.

## Findings

### Overall Patterns of Volunteer Activity

Individuals aged 60 and older less often volunteered than individuals in the general population. Approximately one in four Americans had done some type of formal volunteer work in 1974. In contrast, only 15.7% of all those 60 and over could be defined as volunteers. The percentages of those over 60 who were actively involved in volunteering were not substantial: 7% volunteered two or more times each month and fewer than 5% estimated their total time commitment to exceed 100 hours during the previous year.

In order to consider directly whether volunteering is a role-substitute, it is necessary to examine closely whether significant associations exist between the two dependent variables: volunteer participation and commitment of volunteers, and indicators of involvement in work and family roles.

### Effect of Work Roles on Volunteers

Activity theory suggests that volunteering is a work-substitute. If that perspective is supported by the data, individuals who do not participate in the labor force would be more involved in doing volunteer work than those who are either working or seeking employment.

The findings do not consistently support activity theory. Labor force status influenced volunteer participation among the respondents but in a different way than predicted by activity theory (see Table 1): those who were in the labor force more often volunteered (19.9%) than those who were not working

Table 1. Volunteer Participation and Commitment of Volunteers by Labor Force Status

Labor Force Status	Volunteers <sup>a</sup>		Commitment <sup>b</sup>	
	%	n	Mean Score	
In the labor force	19.9	207	5.3	
Not in the labor force	15.3	504	5.6	
Homemaker	17.8	349	5.6	
Retired	11.6	155	5.5	
Total	16.4	711	5.5	

<sup>a</sup>Comparing those in and those out of the labor force,  $\chi^2 = 11.4$ ,  $df = 1$ ,  $p < .001$ . When the three labor force status categories are compared,  $\chi^2 = 34.9$ ,  $df = 2$ ,  $p < .001$ .

<sup>b</sup>Comparing those in and those out of the labor force,  $F = 3.4$ ,  $p = .05$ .

(15.3%). Retirement did not appear to lead to a greater tendency for the respondents to become volunteers; those who were in the labor force were, in fact, twice as likely as retirees to be volunteers.

The work-substitute function is confirmed when only active volunteers are considered. The commitment scores of homemakers and retirees were significantly higher than those of respondents who were in the labor force. This indicates that, among volunteers, the lack or loss of work roles is associated with greater time commitment. These data are consistent with the 1981 National Council on the Aging study, which found that employed elderly persons were more frequently volunteers but that, among volunteers, retirees spent more time doing volunteer work.

To analyze further the meaning of these associations, they were examined in light of several control variables: age, education, household income, and gender.

### Effect of Age on the Association Between Volunteering and Labor Force Participation

The physical ability to engage regularly in volunteer work varies greatly within the aged population. In the absence of other indicators, age is used as a proxy for physical abilities; it is assumed that, in general, younger age is associated with better health and consequently with greater capacity to do volunteer work.

If physical ability has a great influence on the likelihood that elderly people volunteer, age is introduced as a control variable to consider whether the association between volunteering and work status would be spurious; the greater volunteer participation of those who are in the labor force would mainly be due to the fact that they are also younger.

Four age categories were used in the analysis: 60 to 64, 65 to 69, 70 to 79, and 80 and over. These particular breakdowns were utilized because they reflect differences in volunteer and labor force participation.

The data in Table 2 indicate that the association between volunteering and labor force participation among the respondents was partly a spurious one. When age is controlled and the two major labor force



Table 2. Percentage of Individuals Who Volunteered By Labor Force Status Controlling For Age

Age	Labor Force Status				Significance		
	In the Labor Force	Total	Homemaker	Retired	$\chi^2$	df	p
65-69 (n = 1,348)	20.2	18.9	21.5	13.1	7.1	2	>.01
70-74 (n = 1,129)	19.5	18.4	21.4	14.4	7.3	2	>.01
75-79 (n = 1,343)	20.3	13.6	15.2	11.2	8.3	2	.01

categories are compared, no significant difference appears between the participation of those in and out of the labor force. When a more detailed breakdown is used, however, some differences do appear. In all four age groups, retirees were far less likely to volunteer than those continuing to work. Homemakers tended to volunteer more frequently than retirees but less often than those who were still working.

#### Effect of Gender on Volunteer Patterns

Women volunteer more frequently than men at all stages of the life cycle. This difference might not be as apparent among the elderly as in the general population because retirement reduces male-female differences with respect to work roles. Because the differences between the volunteer participation of retirees and homemakers documented in Table 2 might be due to gender differences, it is important to contrast the volunteer patterns of male and female retirees.

About the same proportion of employed elderly men (19.4%) and women (20.7%) were involved in volunteering. Male retirees volunteered almost half as often (10.7%) as female retirees (18%). Among volunteers, male retirees showed the same time commitment as men who continue to work ( $\bar{x} = 5.3$ ). Activity theory is partly supported by the difference between women retirees and homemakers; homemakers did volunteer work more often, but among the volunteers retirees spent more time in volunteering than homemakers.

#### Volunteer Participation, Labor Force Status and Socioeconomic Status

The greater volunteer participation of those who are employed might be due to socioeconomic factors rather than to work status since the better educated and the more affluent have a greater tendency to volunteer (ACTION, 1975; Morgan et al., 1979).

The data confirm this supposition; the lower participation of retirees can be explained partly by educational and income differences (Table 4). Volunteering appeared to be more closely related to employment status among the less educated (those lacking a high school diploma) and the less affluent (those whose total household incomes were less than \$7,500 per year). For the better educated and the more affluent, significant differences were found between the employed, retirees, and homemakers, but

Table 3. Volunteer Participation and Commitment of Volunteers By Labor Force Status and Gender

Labor Force Status	% Who Volunteered		Mean Commitment Score	
	Male <sup>a</sup> (n = 1,813)	Female (n = 2,526)	Male (n = 226)	Female (n = 428)
In the labor force	19.4	20.7	5.3	5.1
Not in the labor force	10.5	17.8	5.3	5.7
Homemaker	0.0	18.0	—	5.6
Retired	10.7	15.5	5.3	6.2
Total	13.9	18.2	5.3	5.6

<sup>a</sup>Comparing those in and those out of the labor force,  $\chi^2 = 27.3$ ,  $df = 1$ ,  $p < .001$ .

they were smaller than those found for the less educated and the less affluent.

The association between the measure of time commitment and work status is maintained when educational achievement and household income were added as controls (Table 5). Among volunteers, the better educated and the more affluent who were not working were also the most active.

#### Volunteering and Family Roles

Two indicators of family involvement were included in the survey: living arrangements and marital status. Activity theory suggests that persons who live alone and those who are not married would show a greater tendency to volunteer and a higher time commitment than those who live with others or those who are married.

The data show that neither variable influenced volunteer participation in the expected fashion. Individuals who lived alone tended to volunteer only slightly more often (17.2%) than those living with others (15.2%,  $p = n.s.$ ). Married people more often did volunteer work (17.4%) than the unmarried (13.4%,  $\chi^2 = 12.5$ ,  $df = 1$ ,  $p < .001$ ), a finding which is actually the reverse of what activity theory would predict. However, this finding occurred only for those under 65. No association was found between volunteer participation and marital status for respondents who were over 65.

#### Determinants of Volunteer Participation

The data analysis suggests that an understanding of volunteering by the elderly requires a more complex explanation than is provided by activity theory.



Table 4. Percentage and Numbers of Individuals Who Volunteered by Labor Force Status Controlling for Educational Achievement and for Yearly Household Income

Characteristic	Labor Force Status										Significance		
	In the Labor Force		Total	Not in the Labor Force									
				Homemaker		Retired							
	%	n	%	n	%	n	%	n	x <sup>2</sup>	df	p		
Educational Achievement													
Less than high school (n = 2,626)	14.0	73	9.8	185	10.6	130	6.3	55	23.7	2	< .001		
High school graduate or further schooling (n = 1,713)	25.7	134	26.8	319	30.1	219	21.6	100	10.7	2	> .001		
Yearly Household Income													
\$7,499 or less (n = 2,164)	19.1	65	12.6	229	15.0	167	8.7	62	25.2	2	< .001		
\$7,500 or more (n = 1,210)	22.0	102	21.7	162	25.3	103	17.4	59	6.8	2	< .05		

Table 5. Mean Commitment Scores of Volunteers by Labor Force Status Controlling for Educational Achievement and for Yearly Household Income

Characteristic	Labor Force Status							
	In the Labor Force		Total		Not in the Labor Force			
					Homemaker		Retired	
	Score	n	Score	n	Score	n	Score	n
Educational Achievement								
Less than high school	5.1	701	5.1	165	5.3	117	4.7	48
High school graduate or further schooling	5.4	124	5.9	208	5.8	199	6.0	86
Yearly household income								
\$7,499 or less	4.9	62	5.3	208	5.3	162	5.3	56
\$7,500 or more	5.4	98	6.1	144	6.1	94	5.9	50

Socioeconomic factors — household income and educational achievement — as well as age and gender are clearly important in explaining patterns of volunteering by the elderly.

In order to assess the relative influence of all of the factors discussed thus far, several stepwise multiple regression analyses were performed. For heuristic purposes, five models were developed. The first three were based on activity theory, the fourth used the demographic and socioeconomic variables discussed in the preceding analysis, and the fifth combined the variables of activity theory and the four variables of Model 4.

- Model 1: Labor force status → Volunteering
- Model 2: Marital status → Volunteering
- Model 3: Labor force status and marital status → Volunteering
- Model 4: Age, gender, education, and household income → Volunteering
- Model 5: Labor force status, marital status, age, gender, education, and household income → Volunteering

Labor force status (LFSTATUS), marital status (MARSTATUS), and gender were all treated as dummy variables. The category that activity theory or previous studies would indicate as being most closely

related to volunteering (e.g., being unmarried or being out of the labor force) was assigned a value of 1 and the characteristic less often associated with volunteering was assigned a score of 0. Therefore, males, those in the labor force and those who were currently married were all assigned scores of 0 for the purposes of the analysis. Educational achievement (YRSCHL) was an interval level measure insofar as the precise numbers of years of schooling (up to 19) were coded. Household income (HHINCOME) was treated as an interval level measure, and the 13 income categories were each assigned a value.

Table 6 shows the results when the dependent

Table 6. Results of Stepwise Regression Analysis Using Five Models to Predict Whether Aged Individuals Volunteered (Beta Weights)

Independent Variable	Model 1	Model 2	Model 3	Model 4	Model 5
LFSTATUS	+.05		+.05		n.s.
MARSTATUS		-.05	-.04		n.s.
YRSCHL				.23	.23
GENDER				.06	.07
AGE				-.05	-.04
HHINCOME				n.s.	n.s.
Adjusted R <sup>2</sup>	.003	.002	.002	.064	.066



Table 7. Results of Stepwise Regression Analysis Using Five Models to Predict Commitment Levels of Aged Volunteers (Beta Weights)

Independent Variable	Model 1	Model 2	Model 3	Model 4	Model 5
STATUS	n.s.		n.s.		.14
HOUSEHOLD		n.s.	n.s.		n.s.
AGE				n.s.	.09
GENDER				n.s.	n.s.
INCOME				n.s.	n.s.
Adjusted R <sup>2</sup>	n.s.	n.s.	n.s.	.023	.043

variable was whether the individual did any type of formal volunteer work during the previous year. The three models derived from activity theory had relatively limited explanatory power. The Beta coefficients were actually negative, indicating a finding which is the reverse of that predicted by activity theory. The total amounts of variance explained were also quite small.

Models 4 and 5 show that educational achievement had the greatest influence on whether an individual volunteered. Age, gender, and labor force participation were also significant predictors of volunteering.

These five models were also used to explain the commitment levels of volunteers. Table 7 shows that the three activity theory models did not yield significant results. The two other models show that a relatively small proportion of the variation was explained by the independent variables. The most significant determinants of the level of volunteer participation were household income and labor force status. Volunteers with higher incomes and those who were out of the labor force had higher commitment levels.

### Implications for Research and Practice

These findings suggest that an understanding of the level of volunteer activity among the elderly cannot be explained by activity theory. Rather than responding to role loss, a significant number of elderly volunteers may be volunteers who became elderly; that is, their involvement is a continuation of behavior patterns established earlier in life. This would mean that an alternative perspective, continuity theory (Atchley, 1972), is appropriate for understanding this area of behavior.

For individuals at all stages of the life cycle, gender, income and education significantly influence whether they volunteer (ACTION, 1975; Morgan, 1979). These three variables also influence volunteering among the elderly, a finding which suggests that the factors influencing volunteer patterns in old age are no different than at other stages of the life cycle. These data cannot be used to test continuity theory because a direct test would require the use of longitudinal data. The results of this study are only suggestive of continuity theory because volunteering by the elderly was found to be influenced by the same social factors as for other age groups. The data are also

consistent with continuity theory because they show that subgroups with high volunteer participation at all age levels — for example, women (particularly women who are homemakers) and those with high incomes and high educational achievement — are also involved in volunteer work in old age.

A number of unanswered questions are suggested by this analysis which are pertinent to practitioners, especially those who are involved in administering volunteer programs for the elderly. A more complete understanding of the dynamics of volunteering by the elderly requires the collection of data which allow examination of the extent to which continuity of such behavior exists between middle age and old age — that is, whether a significant proportion of aged volunteers are in fact volunteers who have aged. Existing data bases which include information on volunteer patterns of the aged (ACTION, 1975; Harris, 1974, 1982), do not include detailed and reliable information on an individual's participation over time. Were such data collected, it would be possible to answer a number of additional questions: What kinds of non-volunteers become volunteers in old age? What are the factors and circumstances that motivate individuals to become "new" volunteers in old age? What types of recruitment techniques are most effective in recruiting "new" aged volunteers? To what extent do senior citizen volunteer programs reinforce behavior patterns of earlier stages in the life cycle and to what extent do they recruit "new" aged volunteers? These are but a few questions which can be posed to further our understanding of volunteering by the elderly.

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## INTERNATIONAL ASSOCIATION OF GERONTOLOGY

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### SANDOZ PRIZE FOR GERONTOLOGICAL RESEARCH

The prize will be worth 20,000 Swiss Francs, and will be sponsored by SANDOZ LTD, Basel/Switzerland with the purpose of encouraging research in all areas of gerontology and geriatric medicine including biological, medical, psychological, social and other relevant aspects with special emphasis on multidisciplinary research programs.

The Jury consists of the Executive Committee of the IAG. The prize will be awarded on the occasion of the XIIIth International Congress of Gerontology, New York, 12-17 July 1985.

Applications in English should comprise a summary of the research work of 3-5 pages, curriculum vitae, bibliography and reprints of not more than 3 pivotal publications in English or with extended summaries in English.

Individuals, research teams or institutions are invited to submit their applications in English not later than 15 September 1984 to Prof. M. Bergener, M.D., Secretary General, International Association of Gerontology, Rheinische Landeslinik, Wilhelm-Griesinger-Str. 23, D-5000 Cologne 91, Germany.

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