

A PRELIMINARY INQUIRY INTO  
PRE- AND POST-RETIREMENT EXECUTIVES  
AND THEIR RELATION TO LEISURE

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## ABSTRACT

### A PRELIMINARY INQUIRY INTO PRE- AND POST-RETIREMENT EXECUTIVES AND THEIR RELATION TO LEISURE

by

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This investigation was most fundamentally motivated by a concern with the psychological effects of leisure. Forecasters have suggested that increasingly sophisticated technological development may bring a currently emerging leisure-oriented society to full maturity in the United States within the foreseeable future. This study begins with the suggestion that the circumstances of the retiring generation of American business executives might provide our best research approximation of the conditions to be faced by the future's leisure man.

Specifically, the present research was intended to

- 1) provide psychological and demographic descriptions of this peculiarly interesting generation of executives, whose careers have spanned some of the most significant social and economic events in the history of the Republic,
- 2) explore possible differences between pre- and post-retirement populations (on psychological dimensions as well as in background) which might suggest some effects of retirement as well as some variables relevant to these

effects, and

- 3) explore inter-organizational differences among executives which might provide suggestions concerning the effects of organizational variables on the executive's psychological well-being following retirement.

This study was carried out with the cooperation of four pre-retirees and four post-retirees from each one of five major Midwestern organizations. Four of these organizations are commercial corporations and the fifth is a civil service organization with executive responsibilities comparable in scope.

Each executive was interviewed and was asked to complete several printed instruments measuring background, personality dimensions, values, and current life-satisfaction. Among the instruments used were the California Psychological Inventory, the Allport-Vernon-Lindzey Study of Values, the Rokeach Dogmatism Scale, the Rokeach Value Scale, and the Havighurst Life-Satisfaction Index.

The study yielded interesting and perhaps valuable baseline descriptive data for a unique element of the American population. In addition, the pre- and post-retiree groups were found to differ systematically in their extent of variability on the life-satisfaction measure, indicating the presence of mediated retirement effects on post-retirement well-being. Important differences between pre- and post-retirees on personality and value measures were not suggested by the data. However, there appeared to be a tendency toward greater variability of measured values in the pre-retirement group, suggesting differential organizational effects on executive values and inter-organizational heterogeneity.

In general, the study provides no compelling reason to believe that the pre- and post-retirement samples studied here belong to different psychological populations. There is no suggestion that the psychological effects of retirement are serious or that the executive has appreciable difficulty adjusting to his changed circumstances and social inputs.

Although the negative results in this study offer ambiguities for interpretation, the general suggestion appears to be that the consequences of executive retirement are of somewhat less practical significance than has been supposed. However, suggestions are provided for ways in which further studies could represent improvements over the present one.

Discussions are presented on the implications of executive retirement, the prospects of a leisure-oriented society, and the particular significance of the generation of executives sampled for this investigation.

Approved: \_\_\_\_\_

Date: \_\_\_\_\_

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**Gary G. Johnson**

**A THESIS**

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To my wife,  
whose patience continues to seem limitless

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## TABLE OF CONTENTS

	Page
LIST OF TABLES.....	v
LIST OF APPENDICES.....	ix
INTRODUCTION.....	1
Research Difficulties.....	5
Implications of Research.....	11
The Literature.....	14
THE PROBLEM AND RATIONALE.....	16
Preliminary Conceptual Considerations.....	16
Nature of the Present Study.....	19
Purposes of the Present Study.....	20
Conceptual Orientation.....	22
Summary of Expectations.....	34
METHOD.....	35
Design.....	35
Sampling Procedure.....	36
Data Collection.....	38
Instruments.....	39
Scoring.....	45
Analysis.....	46
RESULTS.....	47
Background-Demographic Information.....	48
Personality.....	68
Values.....	71
Life-Satisfaction.....	75
DISCUSSION.....	78
The Sample.....	78
Description of the Executive Sample.....	80
Pre-Retirement vs. Post-Retirement Samples.....	85
Inter-organizational Differences.....	89
Methodology.....	89
Further Study.....	90
Summing.....	91
LIST OF REFERENCES.....	93

## LIST OF TABLES

Table	Page
1. Symbols Used in Theoretical Statements Relating to Executive Behavior.....	24
2. Theoretical Statements Relating to Executive Behavior.....	24
3. Distribution of the Executive Sample.....	36
4. Descriptions of Organizations Participating in Study.....	37
5. Scales From the California Psychological Inventory.....	41
6. Scales From Allport-Vernon-Lindzey: Study of Values.....	42
7. Coefficients of Correlation for Various Measures of Life-Satisfaction.....	44
8. Area of the Country Lived in Before Age 18.....	48
9. Location in Which Most of Early Life Was Spent.....	49
10. Home Town's Main Source of Income.....	49
11. Section of Town Lived In While Growing Up.....	49
12. Birthplace of Parents.....	49
13. Father's Chief Occupation.....	50
14. Formal Education Completed by Parents.....	50
15. Parents Living Together While Executive Grew Up.....	50
16. Who Made the Major Decisions in Family.....	51
17. Type of Upbringing.....	51
18. Role of Religion in Early Home Life.....	51
19. Executive's Religious Participation as a Young Man.....	52
20. Early Agreement With Parents on Matters of Religion.....	52

# LIST OF TABLES (Continued...)

Table	Page
21. Present Frequency of Attendance at Religious Services.....	52
22. Present Religious Preferences.....	52
23. Predominate Activity During School Days.....	53
24. Encouragement From Parents During Teens.....	53
25. Number of Books Around House During Executive's Youth.....	53
26. Most Frequent Location for Meeting Friends During Youth.....	53
27. Most Frequent Location for Meeting Friends at Present.....	54
28. Response to Anger in Youth.....	54
29. Type of School Attended Between Ages of 12 and 18.....	54
30. Formal Education Completed by Executives.....	55
31. Highest Degrees Attained.....	55
32. Extent Still Friendly With People Known in School.....	55
33. Age of Executives.....	56
34. Present Marital Status.....	56
35. Mean Number of Children.....	56
36. Reported Health.....	56
37. No. of Different Cities, Towns, or Townships Lived In.....	56
38. Type of Housing Presently Lived In.....	57
39. Type of Community Presently Lived In.....	57
40. Size of City Preferred.....	57
41. Expression of Concern About Money.....	58
42. Feeling About Adequacy of Financial Resources For Retirement.....	58
43. What Executives Would Do With Largest Share of Sudden Tax Free \$50,000. Inheritance.....	58

# LIST OF TABLES (Continued...)

Table	Page
44. Present Dependents (Not Including Self).....	59
45. Frequency of Drinking Beer, Wine, or Liquor.....	59
46. Attitudes Toward Gambling.....	59
47. Factors Most Influencing Choice of Occupation.....	60
48. Importance of Wife in Career.....	60
49. Critical Experience Influencing Career.....	60
50. Length of Service in Organization and Length of Service in Higher-Echelon Positions.....	61
51. Recognitions Received.....	61
52. Major Accomplishments Outside of Work.....	61
53. Psychological Preparation for Retirement.....	64
54. Attitude Toward Retirement.....	65
55. Remaining Objectives in Career.....	65
56. Family Focus in Anticipation of Retirement.....	65
57. Post-Retirement Involvements.....	66
58. Early Retirement.....	66
59. Age of Executives, By Organization.....	67
60. Mean Years of Education Completed, By Organization.....	67
61. Length of Service in Organization, By Organization.....	67
62. Means and Standard Deviations For CPI Scales Compared With Some Additional Samples.....	68
63. Means and Standard Deviations For Dogmatism Scale.....	68
64. Pre- and Post-Retiree Means and Standard Deviations For CPI Scales.....	69
65. Means For CPI Scales, By Organization.....	70
66. Means For Dogmatism Scale, By Organization.....	70
67. Means and Standard Deviations for Allport-Vernon- Lindzey Value Scales Compared With Some Additional Samples.....	71

1. The first part of the document is a letter from the President of the United States to the Congress, dated January 3, 1862. It is a very important document, as it contains the President's annual message to Congress. The letter is written in a formal, dignified style, and it is one of the most important documents in the history of the United States.

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# LIST OF TABLES (Continued...)

Table		Page
68.	Mean Ranks of Rokeach Instrumental Values.....	72
69.	Mean Ranks of Rokeach Terminal Values.....	72
70.	Means and Standard Deviations For Allport-Vernon-Lindzey: Study of Values.....	73
71.	Means For Allport-Vernon-Lindzey Scales, By Organization.....	74
72.	Mean Ranks of Rokeach Instrumental Values, By Organization.....	75
73.	Mean Ranks of Rokeach Terminal Values, By Organization.....	76
74.	Means and Standard Deviations For Life-Satisfaction Index.....	76
75.	Means For Life-Satisfaction Index, By Organization.....	77

## LIST OF APPENDICES

Appendix		Page
A.	Letter of Introduction to Cooperating Executives.....	95
B.	Research Instruments	
	1. Interview Questions.....	96
	2. Career Summary Sheet.....	97
	3. Rokeach Value Scale	
	a. Terminal.....	98
	b. Instrumental.....	99
	4. Life-Satisfaction Index	
	a. Part I.....	100
	b. Part II.....	101
	5. Background Information Inventory.....	102

## CHAPTER ONE: INTRODUCTION

The advantages of dying old can be overestimated.  
-John Ciardi

Indeed. And though there are many things about modern American life that increasingly perplex its observers, the fact that the poet's aphorism seems particularly appropriate as we near the end of the twentieth century is especially bewildering. The benefits of enormously increased prosperity, vastly improved health, much longer life, and more abundant leisure have been sold to us daily through the popular press. Rapid change is one of the distinguishing characteristics of our time and a great deal of this change has been toward a marked increase in individual freedom to do things accompanied by a marked decrease in things the individual must do. With glaring exceptions, a man's time is becoming his own and his resources are becoming correspondingly enhanced. Of all times in history, one might assume that ours is one in which the good life would be most likely.

In addition, most students of civilization would tell us that human culture does not become richly differentiated until man has some time in which to be entirely impractical if he so chooses. So long as men must spend their waking hours and energetic years simply for maintaining themselves, growth, we are told, is highly improbable and the quality of civilization is not likely to improve. Historically, labor has supported biological life and, perhaps to a significant extent, psychological life as well. Only recently have technology and medicine produced a situ-

ation in which man can expect to be virtually free from labor. His physical needs demand fewer hours of his day and industrial society demands fewer years of his life. For the first time in history, life is truly becoming separated from work. And while this might suggest a new Periclean age of tremendous proportions, it suggests other things as well.

For one thing, even if it were demonstrated that freedom from labor is a necessary condition of cultural progress, we could not assume that it is also a sufficient one. While energies and creativity need not relate to immediate needs to prove beneficial to society, it seems as though it is necessary that they at least be engaged actively and not passively if they are to encourage cultural growth and not cultural waste. The disengagement of man's energies from the business of making a living does not imply a necessary re-engagement of a nature which will prove worthwhile to society.

Secondly, what of the individual? Without work, can there be individual growth--or even survival? The biological consequences of the separation of life from work should not be worrisome since it is our increased productivity and the more general availability of physical resources that make such a distinction ever more likely in the first place. Directly, at least, biological life should not be threatened. However, we might consider it dangerous to make such an assumption of psychological life.

Why leisure should ever be a problem under any circumstances would have been somewhat difficult for even our most recent ancestors to understand. But a problem it seems to be, nevertheless. In its most general, far-reaching form, it is a problem that concerns the very meaning of

human life and the contribution of work to that meaning. If it is true that "my work is my life", what happens to my life when there is no longer work? If work has largely supported meaningful psychological life in the past, can we expect a psychological crisis when that work is removed? When a man's job has been a major source of satisfaction, self-esteem, and self-actualization, what happens when that job is made inconsequential or no longer exists?

For the most part, many of the most significant implications of this problem lie somewhere in our future, since the bulk of the American population is still actively engaged in earning a living. The practical consequences of finding meaning in a life well-provided for, but which is not work-centered (in a restricted, conventional sense) are presently felt only by some selected groups within society. And while it is sobering to be told that these consequences may soon be of the highest relevance for society as a whole, economists are by no means agreed on how imminent such a leisure-oriented situation is.

Overall, it wouldn't appear unreasonable to direct research toward the problem of leisure, since the odds seem to be heavily in favor of continuing and increasingly fundamental change in this area. Prudence would suggest that preparations should be made and, typically, the adequacy of preparation depends upon the adequacy of our knowledge. The assumption of a serious future adjustment to leisure on the part of society isn't an unreasonable one, but it does itself carry assumptions which should be made clear. This is particularly true if human labor is not all but eliminated in the next very few years, before world social and economic conditions have evolved substantially. While timetable estimates vary a great deal, the currently most popular guess

among economists seems to be that this new circumstance will not develop itself to full maturity over night.

On the other hand, if these conditions are forecast exclusively for such affluent countries as the United States on a longer-range basis, we must presume some ability of these prosperous countries to remain somewhat insulated from developing social, political, and economic conditions world-wide. But to be able to do so safely for any extended period of time seems unlikely at best. It has become increasingly clear during the past few years that to be or not to be isolated from world society as a whole is not a real choice, and that it never really was. Modern communications and accelerating conditions in the world have simply accentuated the currently dangerous relations among the potent components of the world system, of which the United States is only one.

It seems, then, that human labor cannot virtually disappear on an exclusive basis in the United States and a few of the other economically fortunate countries without seriously dangerous disequilibrium being the result. Long-range enjoyment of the fruits of modern technological advances and consequent long-range leisure society depends to some upon the ability of technology to create similar conditions on a global scale. While the prospect of this occurrence is certainly not immediate, the possibility, indeed likelihood, cannot be rejected out of hand. In fact, it may be the only alternative to global destruction. So, whatever might be one's assumptions about rates of development, it appears that leisure can, will, and perhaps must be a continuing and broadly-based phenomenon for which preparation and research are appropriate.

### Research Difficulties

The difficulties of studying the psychological implications of leisure are immediately apparent. In our present society, there are few pure examples of the circumstances which have been discussed. While it is true that there are people without work and that there are people whose work is not meaningful, it is difficult to find a situation in which job significance can be studied in relation to such things as psychological adjustment, self-actualization, and the productive mobilization of energies without fear of the substantial interference of other variables.

For example, there is always a certain unemployed element in society. One might expect, however, that this unemployment threatens biological life as well as psychological life and that it is not unlikely that the former would often take priority. The situation for the individual would seem quite different from that which we would expect in a future from which we may not be far removed. Furthermore, today's unemployed are often society's least employable. Later, however, we do not expect this to be the case. An increasingly literate American society is emerging, one in which capacity for creative contribution will be ever more widely distributed. The majority of the future unemployed will be unemployed not because of inability but because of the decreasing utility of human labor in the production and distribution functions of the economy.

Secondly, there is a great deal of contemporary discussion of the alienation of workers because of job fractionation. We are told that the job is not meaningful to the worker and that this has important consequences both for the individual and for the organization. For our purposes here, however, this person does not offer the sort of

research opportunity that we would consider most appropriate. While the work may not be meaningful and, of itself, may not contribute substantially to the individual worker's life-meaning, it is true that a substantial portion of his time is occupied by his job and that there is a quite direct relation between this activity and his income which supports his other life activities. This is also a condition quite unlike that which we expect in the future. In addition, we have a difficulty somewhat analogous to that discussed above. Presently, the individual most likely to be engaged in a "fractionated" job is often the individual least prepared to engage in the more substantive types of work available.

Fortunately, there is one additional contemporary situation which might offer some research possibilities of relevance to advancing problems of leisure. This is the currently important area of retirement and perhaps our best opportunities lie here. This is not to say that this area is free from difficulties. For one thing, one cannot assume that the retiree is necessarily free of financial concerns and that his biological welfare is assured past his last working day. The fact is that adequate income is one of the major concerns of those presently reaching retirement. Care must be taken in order to secure a research population whose primary adjustment is to new and unfamiliar leisure.

In addition, the study of some selected groups of retirees might offer little more than the study of the alienated worker mentioned above and for many of the same reasons. If a man has been alienated from his job throughout the majority of his working life, one would expect that some sort of adjustment would have occurred long before he reaches retirement and that the absence of his former job would not have the same meaning for him as for the man who has been highly ego-involved with his work and psychologically dependent upon it. Here again,

we are interested in the relatively sophisticated individual who is quite adequately prepared for creative productivity and, at present, some available groups of retiring individuals would not adequately represent those in whom our primary interest lies.

Finally, the problems of leisure brought on by present-day retirement are closely tied in with the problems of advancing age. In the future, this will not necessarily be the case, since leisure, unemployment, and retirement may be largely associated with one's most vigorous and potentially creative years.

For these reasons, at least, one would not expect to gain significant insights into the problems of a new broadly-based leisure class by studying certain inappropriate elements of the retiring population or the retiree in general. It seems, however, that there are some segments of society whose retirements quite closely parallel the circumstances of the emerging man of leisure and which largely avoid the problems discussed. One such segment is occupied by the American business executive.

A study of the psychological adjustment problems of the executive in retirement (assuming there are some) has several things to recommend it. It could be worthwhile both because of its potential relevance to the broader problems of leisure suggested above and for its more immediate practical implications for business organizations and the retiring executives themselves. First, of all retired individuals, the executive seems least likely to be plagued by financial difficulties. This is particularly true of those executives toward the top of the organizational hierarchies of major companies and, for this reason, the major executive might be most valuable for studies in the area of leisure and its psychological implications. When such an executive retires, one could assume

that the absence of his former job usually implies no direct biological threat.

Further, the executive seems to satisfy our interest in persons for whom a job is particularly significant. Since business is a highly competitive activity and since one's presence in an upper-echelon position implies a certain degree of achievement motivation, one would expect that here we would have at least some people for whom the job is a focus for appreciable life-meaning. The psychological literature offers considerable evidence of the relationship between job status and job satisfaction (Uhrbrook, 1934; Hoppock, 1935; Thorndike, 1935; Bell, 1937; Super, 1939; Hull and Kolstad, 1942; Gurin, Veroff, and Feld, 1960). In the Gurin, Veroff, and Feld study, managerial people were found to be substantially more satisfied with their jobs than clerical workers, sales workers, skilled workers, semiskilled workers, and unskilled workers. In addition, those at the managerial level mentioned ego satisfactions substantially more than lower echelon people while the opposite was the case with extrinsic satisfactions. In short, our knowledge of the role of the executive in modern American business and industry as well as the quality and degree of preparation necessary for participation in such a role would suggest that the executive typifies the highly motivated, well-prepared, job-oriented individual.

While a study of the executive does not formally avoid the difficulties of confounding problems of old-age with problems of leisure, one might have reason to suspect that problems associated with aging itself should be at least no greater for the executive at retirement than for any other current segment of society. And since the executive is usually located in the higher socioeconomic status areas, one would expect him

to enjoy full benefit of those financial, medical, and style-of-life factors encouraging vigor on into his later decades. In addition, there seems to be a continuing tendency toward earlier retirement in commerce and industry. This, coupled with the implications of an increasingly expanding life expectancy, suggests that physical deterioration might not be universally significant among those problems faced by the executive at retirement. One might suspect that the more important problems are first and most fundamentally psychological.

Here, one important observation should be made. While it is true that the retiring executive population seems to offer one of the best available approximations of a future leisure population, it is necessary to keep in mind that it's highly unlikely that they will prove to be comparable in any fundamental way. The present generation of retiring executives is probably the last to lie almost wholly outside this end of a transition period between a socioeconomic system in which the right to consume is based more or less upon individual contribution to GNP and a socioeconomic system necessarily based on something quite different (given our assumptions about the shifting relation of man and machines to productivity). Our leisure-man will lie outside the other end of this transition period and will differ a great deal from today's retiring executive because the culture into which he will be born and within which he will have to function will differ a great deal from ours. Retirement represents, to the executive of today, a change from a life of GNP-oriented activities and relationships to a life without them. And one would expect that it's really the CHANGE to which he must adapt, not the lack of work itself. On the other hand, it is likely that "retirement" for the future leisure-man will be, not a change, but a way of

life, a set of assumptions about the way things are naturally supposed to be. Consequently, the absence of work (in the ordinary sense) will be something quite different for the two men. Present behavior always has some important relation to behavior which has occurred earlier in the history of the organism and the histories here will differ not only in their particular content, but also in their context.

Moreover, scientific studies of behavior carried on within a given cultural context are always culture-bound, always to some extent. Inquiry never occurs in a vacuum. Culture is the glass through which science peers as well as both the form and prime-matter of the phenomena peered at. For this reason, a study of executive retirement cannot really be a study of the psychological effects of no-work, *per se*. The executive's long and intense work history has seen to that. The best we can do is to study the psychological effects of a changed stimulus situation and, from this study, gather hints about the psychological inputs necessary for adjustment in a no-work environment. But, though these hints can have some preliminary usefulness for speculations about a future and highly developed leisure society, their greatest usefulness may prove to be related to the transition period itself. The term used earlier was "the EMERGING man of leisure". And though guesses of when man will finally become obsolete in the labor market have begun at fifteen years or so hence and have extended to something short of infinity, there seems to be general agreement that we as a race are entering the beginnings of a new age (perhaps already with unnerving speed) and that the painful processes of transition are likely to sweep along with them the lives of a large proportion of our people for one or more generations, the number depending upon one's assumptions about the rate of

change. In any event, the executive population seems to be one of the best we have for stimulating the circumstances either of the emerging or of the mature man of leisure, the former more than the latter. In behavioral science, predictive accuracy usually deteriorates as the time interval over which the predictions are made increases. If we look too far ahead, we are likely to see only the fuzzy outlines of strange things we cannot understand because they so little resemble anything we have ever seen before and because our experience has not given us the tools, either methodological or linguistic, for dealing with them. The predicament is common in behavioral science: We know that our data can generate only extremely conservative and tentative inferences, even before we know what the data are. We are historical creatures, prisoners of time and space. Scientists too.

### Implications of Research

The immediate practical implications of additional knowledge of the circumstances and consequences associated with executive retirement are several. First, the individual executive might be better able to prepare for his non-working years if he were to better understand what will face him at retirement and how these circumstances might relate to his needs and capabilities. The organization, on the other hand, could profit from additional knowledge of the ways in which executive retirement affects the organization and its effective functioning. In addition, the organization would be in a better position to establish more adequate and relevant preparatory programs for its executives, if necessary, as well as more satisfying and mutually useful post-retirement relationships. Finally, society at large could benefit from the retired executive's continuing engagement in programs relevant to society's needs and in prob-

lens with which the executive, by virtue of his peculiar talents and long experience, might be singularly equipped to deal. While Western society in general and American society in particular seem to be moving toward an era in which human contributions will be increasingly less critical to well-being, the developing circumstances in the world as a whole would suggest that we can little afford to waste any human talent or energy. A rapidly accelerating trend toward a dangerous and grossly uneven distribution of the benefits of modern technology demands the attention of anyone who might have effective means for dealing with the situation.

Though the general topic of retirement has been approached in one manner or another by workers in several disciplines, very little has been done on the specific retirement needs of selected groups of retirees. Similarly, though many companies have some sort of pre-retirement preparatory program for company employees in general, there appears to be little if any effort to tailor this preparation to meet the particular needs of specific groups of employees. In general, one might suspect that business executives, along with professional people, educators, leaders in government, religion, etc., might share characteristics and retirement needs which they do not share to a great extent with other types of workers. Their familiarity with a high degree of creative activity and/or responsibility might be a source of satisfaction during their post-employment years, but it might also be a source of disenchantment and frustration.

In summary, it appears that the implications of executive retirement are several that they can be organized into at least four categories.

In descending order of generality, but not necessarily in descending order of importance, these are as follows:

1. Implications associated with the executive as representative of a future but rapidly emerging leisure-oriented society, i.e., as representative of a new broadly-based leisure class.
2. Implications associated with the executive as representative of a larger socially significant group with superior training, experience, and capacities for responsibility and creativity including, in addition to executives, selected persons in education, the sciences, the military, politics, etc.
3. Implications associated with society's opportunities for profiting fully from the executive's skills and experience.
4. Implications associated with the individual executive's adjustment and well-being.

All of the implications summarized above relate closely to the extent and quality of the executive's adjustment to changes brought on by his separation from his career. In the literature, as well as in folklore, it has appeared that retirement has often been seen as something decremental, quite unlike other and earlier significant milestones in life's sojourn. The executive's particular circumstances as well as the needs of the time suggest a serious and puzzling paradox here and the new world with which technology is confronting us promises to present a situation in which the decrement will be unnecessary or even entirely inappropriate.

### The Literature

Only two significant investigations into executive retirement have emerged from the literature, one nearly ten years after the other. The first, by Harold R. Hall (1953), was the pioneering study in the field and was a product of the Graduate School of Business Administration at Harvard. The second, by Richard A. Beaumont and James W. Tower (1961), comes from Industrial Relations Counselors, Inc., a nonprofit research organization specializing in industrial relations research. Both are creditable efforts and make substantial contributions to an understanding of many aspects of executive retirement. Neither, however, deals with the psychological aspects of the retirement problem and, though both incorporated the interviewing of several hundred executives, the focus has been on the economic and organizational implications of the problem. The individual retiree, his personality, his needs, his post-retirement activities, etc., are touched upon only indirectly and coincidentally. In the preface to Some Observations on Executive Retirement, Hall notes that considerable variability prevails among retired executives in the extent to which their adjustment has been satisfactory and in the extent to which contentment or discontent has dominated their later years. Essentially, however, the problem is dropped at that point. There is no systematic effort to determine in what additional ways the respective executives differ from one another. While both books offer considerable anecdotal observation from the various interviews, little was learned of the variables associated with what might be called successful adjustment to retirement and the variables associated with an unsuccessful adjustment to retirement.

Apparently, the differences among retiring executives are signifi-

cant if not clear. It is not uncommon to hear references to cases in which previously healthy and apparently well-adjusted executives suddenly begin to have either physical health problems or emotional difficulties soon after retirement. In some cases, death occurs only a few months after leaving the job. In other cases, alcohol suddenly becomes a problem or severe depression results. Both of the above mentioned books report such instances. Unfortunately, however, there appears to be no indication in the literature (either in these books or elsewhere) of the frequency with which such difficulties arise. We have no solid data indicating the proportion of satisfactory adjustments to unsatisfactory adjustments. Our personal experience as well as the 1953 and 1961 studies do, however, lead us to suspect that the area deserves at least a preliminary examination.

## CHAPTER TWO: THE PROBLEM AND RATIONALE

### Preliminary Conceptual Considerations

From a research standpoint, the problem is both a broad one and deep. There is need for systematically obtained information to serve questions relating to the general problems of leisure as well as questions relating to the more specific problems of the individual executive and his organization. The ultimate task for the scientist would be to identify the individual and situational variables functionally related to specific post-retirement states and events which have been differentiated in such a manner that combinations of these states and events could be selected for defining "satisfactory adjustment" to retirement and "unsatisfactory adjustment", respectively.

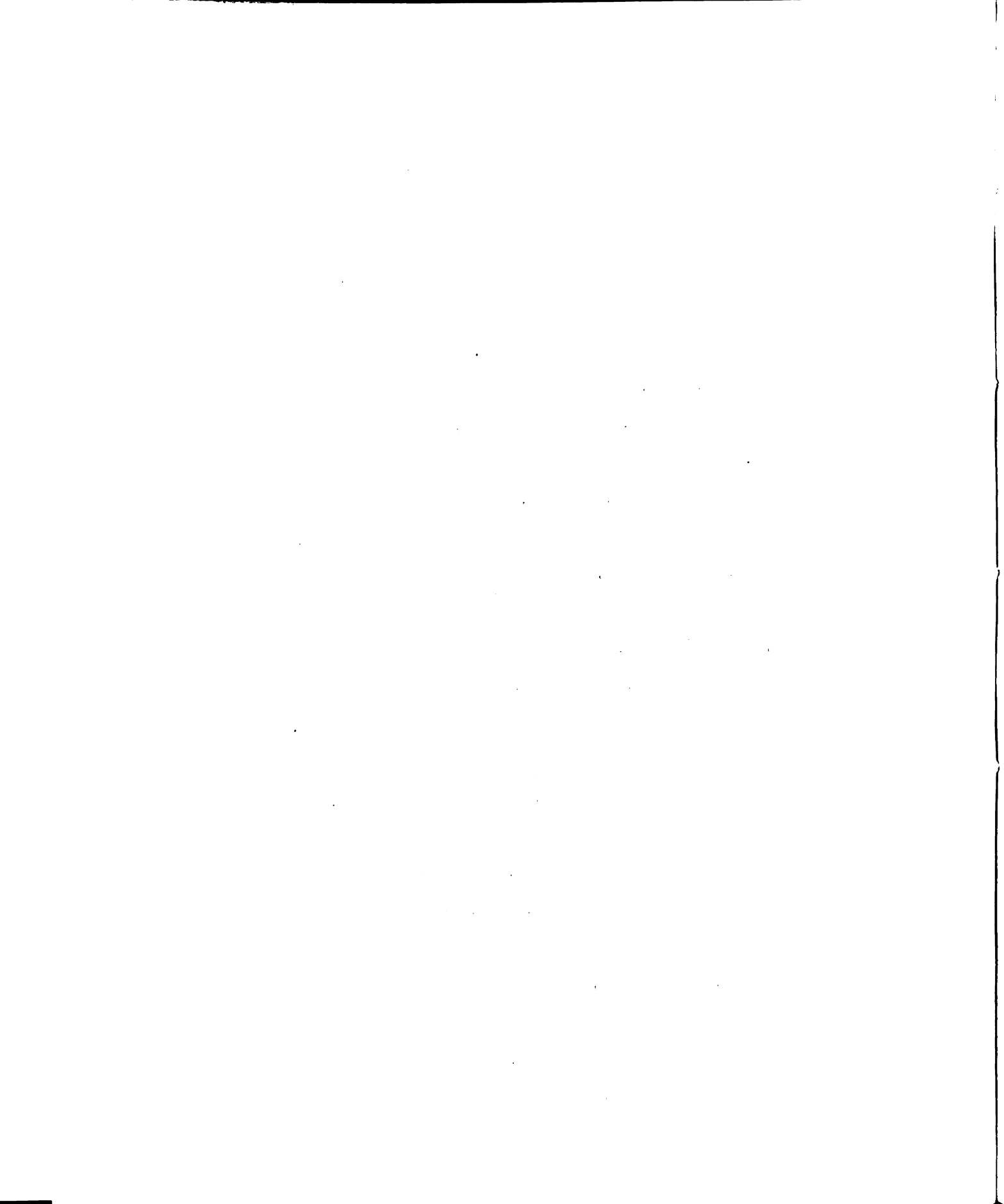
The old "criterion problem" should not be a problem. Much of the confusion which the race (scientists not excluded) has generated for itself during the perplexing period of its history has been, at base, a confusion of words with things and an inability to determine which are antecedent to which. The question is not "What is satisfactory adjustment?", but "What should we call it?".

A concept is produced by selecting slices of sensory experience past or present for inclusion in a pigeon hole with the appropriate label attached. And the decision of what to put in and what to leave out is not nature's, but ours. Moreover, in this case, the decision is not so much the task of the scientist as it is of the technologist and one would expect that the particular manner in which "satisfactory adjustment" is

operationalized would and should vary as a function of who the technologist is and what his values and objectives are. At any rate, once the ultimate job of the scientist is completed (that of uncovering functional relations among independent measures), information would be available which could provide a base for description, prediction, and influence of value to anyone having interest in the determination and fruits of particular post-retirement circumstances. Given an ideal scientific state of affairs, then, "satisfactory adjustment" should be defined by the individual executive, his organization, or the society in ways useful to them.

The discussion so far, however, has suggested that our present state of knowledge is anything but ideal. Rather than at the end, we are at the beginning. Furthermore, the ultimate objectives of science in this area lie a considerable distance from this beginning in research steps necessary, if not in time. Done at all, science must use the resources available in the present. Done best, it is a cumulative enterprise which displays a gathering of momentum as it proceeds successfully. This study begins with a realization of the importance of the executive population for our social and economic system, but with little more. We know nearly nothing at this stage and we suspect really very little which is both specific and useful for our work here. Since we are not equipped to approach our ultimate aims directly, then, preliminary work must be done.

A final step always suggests some which have gone before and all presuppose a first. In science, the first stage of a systematic inquiry is often less systematic than those which follow or less so than the effort as a whole---and often necessarily so. Abraham Kaplan, in his remarkable book The Conduct of Inquiry, suggests two contexts in which scientific



activity is legitimately carried on: 1) the context of discovery and 2) the context of justification. These differ in several ways, one of the most obvious of which is the differing criticisms which are appropriate for each. In large measure, the most frequently heard criticisms of existing studies are appropriately directed toward the context of justification. Unfortunately, however, they are frequently not confined to it. The academician who has discovered the control group may not yet be entirely sure that it is really useful in research, but he knows that it certainly is a useful device in an argument. And when a study has been carried on in the context of discovery, such arguments can be applied in their most apparently devastating forms, but all too often quite inappropriately. This is not a defense of inadequacies in scientific procedure. There is no doubt that, understandable or not, inadequacies at any stage of inquiry cannot be overlooked. There is no escaping the reality that the degree of trust we may legitimately give to conclusions is limited by the extent to which procedures and circumstances fall short of ideal. If they are less than fully adequate for the task's objectives, for whatever reason, we must simply be content with knowing less. But meagre knowledge seems to be an expected as well as chronic consequence at early stages and we should not assume that science has spoken all it has to say after hearing only its first statement. Science does not differ from other historical means of building conceptual maps of the world so much in that it is empirical instead of speculative, but in that it is empirical IN ADDITION to speculative. It is almost always necessary to be able to say what is apparent before we are able to say what is.

All of this is simply to say that, though we might expect that a preliminary and exploratory study such as this might not yield a great deal

by itself which is systematic and to a high degree trustworthy, we must realize that the first context which Kaplan discusses is as appropriate to science as the second. More importantly, both are absolutely necessary if there is to be human progress, if human conceptual systems are to usefully reflect systems in the natural world with increasing adequacy. The part is not to be mistaken for the whole.

### Nature of the Present Study

This investigation is not experimentally oriented in any accepted sense. It is preliminary, exploratory, and largely descriptive. It represents part of the "bumping and stumbling" stage that might lead to further studies of a more comprehensive and precise nature.

In an investigation of executive retirement, the initial difficulty is fundamentally the same as in most inquiries. There are a near infinite number of post-retirement states and events (if one looks closely enough) as well as a comparable number of individual and situational variables. Moreover, these may be connected by an astronomical number of functional relationships. One might suspect that everything in the world is related to everything else at least in some way and to some extent, however slight. But since money, time, and energy are not free goods, all of these relations cannot be determined. Happily, this is neither necessary nor desirable.

Some of the relationships will be irrelevant and some so slight as to have no practical consequence. Science in general functions to simplify and applied science is even more concerned with cutting through some relationships to others of more fundamental interest. In short, we are interested not in all relationships of individual and situational var-

lables to post-retirement behavior, but only in those which have likelihood of being relevant to the practical considerations of the various technologists and interest groups discussed above and in those which are strong enough to make a difference. In the long run, then, ignoring some things should not be an accident, but ignoring the wrong things will be.

Since we do not know which variables are important in accounting for pragmatically meaningful amounts of variance in post-retirement behavior, some preliminary probes must be made in order to search out variables most fruitful to pursue. This is such a probe. Methodologically, it ventures only a fractional step beyond clinical observation, broadly understood. However, relatively uncontrolled observation of one sort or another is usually responsible for suggesting hypotheses during those early stages of research when tight conceptual structures are not yet available for the job. In this study, one would expect not so much to begin with hypotheses as to end with them.

### Purposes of the Present Study

Samples from the population of American executives are drawn in service of several questions, general and specific. Preliminary explorations are directed to the following concerns.

#### 1. Pre-retirement vs. Post-retirement Behavior

If the newly acquired leisure of retirement offers a challenge to the executive's psychological well-being, i.e., if retirement does have undesirable effects on the adjustment of at least some executives, one would expect that measurable differences should exist between representative samples of pre- and post-retirees on at least some psychological dimensions. If no differences can

be found, one would have no evidence that retirement has an undesirable effect. If differences are found, further work should be done to determine the specific nature and extent of these differences as well as the personal and situational variables with which they are associated. The fundamental question for preliminary research, then, is this: Do representative samples of pre- and post-retirees belong to different psychological populations? Both distribution level and spread are important in relation to this question, since pre- and post-retiree differences may show themselves either in one or both of these respects. Further, if later research is to seek out variables which account for significant amounts of variance in post-retirement behavior, as indicated above, one should first know if variance exists which is either theoretically or practically interesting.

## 2. Description of the Executive Population

The current generation of American executives who are either at or near retirement is a particularly interesting one. It is a transition generation, the careers of which span some of the most significant industrial, technological, and economic events in the history of the country. In addition, the executive population itself is an interesting one in an industrial democracy. There is value in knowing something of the characteristics of people who are drawn toward and who succeed in organizational leadership roles. It is also good to have descriptive data available for selected populations such as this in order to provide further validation of psychological research instruments as well as to make possible meaningful comparisons of this sample from the

American population with others.

### 3. Inter-organizational Differences

Organizations differ in many measurable respects and these differences can influence executive behavior both on and off the job in several ways. The use of a sample of executives drawn from a number of organizations in this study, rather than one, serves at least two purposes.

- a. Some hint may be provided of the extent to which the specific "character" of organizations can influence the executive's post-retirement behavior. Differential demands placed on executives in differing contexts may result in a "forced homogeneity" within organizations. A comparison of data across organizations, then, might provide clues to the existence and identification of organizational variables which are related to post-retirement states.
- b. The use of data from several organizations is also valuable because of its contribution to the reliability of descriptions of the executive population.

### Conceptual Orientation

Facts don't speak for themselves. There is no doubt that a conceptual realm is absolutely necessary in science (for the same reasons it is necessary in life). Scientific activity which is entirely and exclusively empirical is not very powerful and its cumulative yields are not great. At this stage, however, no tight predictive model is available for dealing specifically with our subject here. Consequently, we

have no deductive hypotheses which are designed to provide theory with its empirical referents. And while there seems to be some sort of compulsion running through a good deal of behavioral research which assumes a necessity for providing hypotheses, whether or not there is theoretical justification for them, it doesn't appear that this sort of magical activity really changes anything. In addition, it doesn't appear that the infancy of social science is likely to be severely retarded by simply looking at the data without first generating highly specific but arbitrary guesses about it.

The best we can do at this point is to locate the activities of the present study within the descriptive theory of general psychology. Such an orientation is useful in that it can provide at least some loose rationale for doing what is done rather than any one of a near infinite number of other things possible.

In very general theoretical terms, the research literature of psychology can be summarized by saying that any human response is the result of personal predispositions and situational inputs, combined according to some functional rule ( $X_1$ ), i.e.,

Human Behavior = Predispositions  $X_1$  Perceived Stimulus Situation

For our purposes, in the behavioral study of executive retirement, this statement can be used as a basis for several additional statements which can serve to more clearly define the nature of our inquiry and the expectations associated with it. Given this statement and the symbols defined in Table 1, we can construct the theoretical statements presented in Table 2. Further, these can be considered in relation to their implied assumptions, the ultimate objectives of research in this area, and the

purposes of this particular study.

**Table 1. Symbols Used in Theoretical Statements  
Relating to Executive Behavior**

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- A. B = Human Behavior
  - B. P = Predispositions
  - C. S = Situation
  - D.  $B_{pr}$  = Pre-retiree Behavior
  - E.  $B_{po}$  = Post-retiree Behavior
  - F.  $P_{pr}$  = Pre-retiree Predispositions
  - G.  $P_{po}$  = Post-retiree Predispositions
  - H.  $S_o$  = On-Job Situation
  - I.  $S_{of}$  = Off-Job Situation
  - J.  $B_{pr,o}$  = Pre-retiree On-Job Behavior
  - K.  $B_{pr,of}$  = Pre-retiree Off-Job Behavior
  - L.  $B_{po,of}$  = Post-retiree Off-Job Behavior
  - M.  $B_o$  = Behavior Associated With On-Job Situational Inputs
  - N.  $B_{of}$  = Behavior Associated With Off-Job Situational Inputs
  - O.  $B_p$  = Behavior Associated With Predispositions
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**Table 2. Theoretical Statements Relating to Executive Behavior\***

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- 1.  $B = P \times I \times S$
  - 2.  $S = S_o + S_{of}$
  - 3.  $B_{pr} = P_{pr} \times I \times S_o \times I \times S_{of}$
  - 4.  $B_{po} = P_{po} \times I \times S_{of}$
  - 5.  $B_o = B_{pr} - B_{po}$
  - 6.  $B_{of} = B_{pr} - B_o - B_p$
  - 7.  $B_{pr} = B_{pr,o} + B_{pr,of}$
  - 8.  $B_{pr,o} = P_{pr} \times I \times S_o \times I \times S_{of}$
  - 9.  $B_{pr,of} = P_{pr} \times I \times S_o \times I \times S_{of}$
  - 10.  $B_{po} = B_{po,of}$
  - 11.  $B_{po,of} = P_{po} \times I \times S_{of}$
- 

\*The elements in each of these statements refer to some theoretical mean population value in each case.

Table 2-1 is the summarizing theoretical statement upon which all of the following statements depend. For our purposes, it is possible to partition the situational component into two aspects: a) on-the-job situation and b) off-the-job situation (as shown in number 2). Given this distinction, one can conceptualize the composition of the pre-retiree's behavior in the manner as shown in number 3. Post-retiree

behavior can also be analyzed in this way, but since the on-job situation in this case would equal zero, this element drops out of the equation (number 4).<sup>\*</sup> Consequently, given numbers 3 and 4, it is possible to conceptually isolate that portion of the executive's behavior that is associated with on-the-job situational inputs (number 5). Any measured behavioral differences that are found between representative samples of pre- and post-retirees should then be attributable to this factor. Ultimately, it would be of great interest to industrial psychology, as well as this particular study, if the respective contributions of on-job and off-job situations to executive behavior could be isolated empirically. Research in industrial psychology has for years dealt with this very problem, e.g., in approaching such operational questions as "What is a job?", "What is work?", etc. And while the behavior associated with off-job situational inputs is shown in number 6, the particular conceptual approach offered here does not provide a means for isolating the critical  $B_p$  element upon which any empirical determination of  $B_{of}$  would depend. This particular study is not so much interested in the  $B_{of}$  element, however, as it is in  $B_o$ . If behavioral differences between representative samples of pre- and post-retirees can be found, it would allow at least preliminary inferences about the contribution of on-job inputs to behavior and the possible psychological losses incurred when these inputs are no longer present. Until such differences are found empirically, one cannot conclude that  $B_{pr} - B_{po} = B_o = 0$  is a false statement.

Statements 2 through 6 in Table 2 carry with them assumptions in addition to the truth of statement number 1. For one thing, a strict

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<sup>\*</sup>No assumption is made that  $X_i$  in these statements refers to a multiplicative relation in an arithmetical sense (in which case everything to the right of the equal sign would drop out!); it is a place-holder representing some rule for combining the various elements. The actual nature of this rule would have to be empirically determined in each case.

interpretation of the equations assumes the independence of the elements to the right of the equality signs. Of course, this assumption cannot be made. Situational differences over time have an enormous influence on the organism's predispositions to respond. In addition, the organism's present predispositions largely determine the interpretation it will make of the present stimulus situation, WHAT is perceived and HOW it is perceived. The elements represented in the model, then, whether in their original or in their partitioned form, constantly interact with one another in an exceedingly complex manner. While present behavior depends upon the values of each of the elements combined in some way, it is also true that the value of a particular element will be determined largely by the values of other elements.

Secondly, the exact nature of the functional rules represented in each case cannot be stated. It's quite likely, though, that they will not all be the same, also depending to some extent upon the elements themselves in a particular case. The model allows for the conceptual isolation of behavior associated with on-job inputs, but such an isolation can really occur in a strictly logical manner only if the functional rules were to call for the additive combination of the elements. While this would work conceptually and while it cannot be said precisely what the functional rules are in each case, most of the psychological research to date would strongly indicate that it is very unlikely that any of them are empirically additive.

Though both of the above assumptions and their empirical unlikelihood severely limit the use of the model as a tight logical instrument for use in the empirical realm, it still has value as a preliminary (albeit over-simplified) intuitive guide for helping us center on what it is that this and subsequent studies are intended to do. The further

development of useful conceptual systems, perhaps with a base similar to this, can occur with additional research.

Finally, the model assumes that  $P_{pr} = P_{po}$ . If our series of statements is to provide for the conceptual isolation of  $B_o$ , this assumption has to be made. We have to assume that the executive population does not differ systematically in matters of "set" as a function of pre- vs. post-retirement status. While this assumption, in principle, carries with it many of the problems discussed above in different contexts, it is possible to provide an empirical test of it. One of the functions of this study can be to make a beginning in this respect. Measures of executive predispositions can be made and if differences are found, the model must be amended. If no differences are found, one could not assume that  $P_{pr} = P_{po}$  is false, but further research would have to be done in order to determine if the pre- and post-retirement populations do not in fact differ in this respect. Hints and direction can be provided here.

The second group of statements in Table 2 is included simply to extend some of the ideas presented in the first group and to point out that the executive's behavior, like his stimulus situation, can be partitioned conceptually. This exercise can serve to make clear some of the important psychological differences which should exist between the pre- and post-retiree populations. For example, measures of pre- and post-retiree behavior are really measures of two different phenomena which have two different sets of components, as numbers 7 and 10 show. The pre-retiree is continuously engaged in making both on-job and off-job responses in association with the role-prescriptions, constellations of reinforcements, etc., peculiar to each. The post-retiree, on the other hand, must respond only to the demands of his present off-job situation. His behavior, his

response configurations, need only relate to the social environment not formally associated with his former work role. If, as Whyte (1956) suggests, there is such a thing as an Organization Man, are there behavioral changes when the man in the Organization Man is released from his harness? What effect does former on-job behavior, in addition to on-job situation, have on the executive's behavior after retirement. What effect do off-job engagements continuing through the transition period from work to no-work (their number and kind) have? What about the social situation after retirement? Are new interpersonal relationships established after retirement to compensate for those lost at retirement? If so, what are their effects on the executive's sense of well-being, attitudes, activities? Here, both major types of variables from the tradition of social psychology are important: present situation and learning. And here we are concerned not only with the influence of retirement itself but also with the differential effects on post-retirement behavior that might ensue from career-long experiences in organizations with different goals, climates, value-systems, and role-systems.

The concept of human organization implies a non-random distribution of overt behaviors. But, if it is to continue for any extended period of time, it is also necessary that individual human predispositions within the organization be distributed, not only non-randomly, but in a stable and characteristic way. Persons inside the organization must be more like one another (in some critical respects) than they are like people in other organizations or people outside of organizations. In order to accomplish this, any given organization tends toward the establishment of norms for individual behavior, overt and covert. In addition, a system will be developed for bringing about conformity to these norms and thereby

superimposing on the individual the organizational values which they represent.

Given this process and given several organizations which differ on some dimensions, one would anticipate finding executive values to be relatively intra-organizationally homogeneous and inter-organizationally heterogeneous. Moreover, one would expect that this phenomenon would be most marked among pre-retirees since they are still actively engaged in the pursuit of organizational goals and are still directly subject to intra-organizational pressures. That is, while one would expect post-retirees from a given organization to be somewhat similar in their values, one would expect them to be LESS similar than pre-retirees from the same organization. The influence of individual differences should be more pronounced in the post-retirement population, giving rise to more random variation in measured value scores and causing them to tend more toward some single mode rather than several. In short, any representative sample of post-retirees taken from several organizations should be more homogeneous in their values than an otherwise comparable sample of pre-retirees.

Inter-organizational differences reflected in measures of executive behavior can be the result either of processes occurring inside the organization and acting upon the executive's predispositions over time or the result of differential recruitment of executives in the first place. With this in mind, it would be useful to utilize some means of determining the extent to which the executive population across organizations compared before being subject to organizational pressures. How much of any measured inter-organizational difference and intra-organizational similarity in executive behavior can be attributed to inputs and how much to processing?

In summary, then, this study, for the purposes described above, explores the relations of two gross variables (pre- vs. post-retirement

status and organizational affiliation) to several measures of executive behavior, overt and covert. Because of the exploratory nature of the study, a fundamental problem at the outset is that of determining what the behavioral measures should be. What psychological characteristics will prove, in the long run, to be relevant and useful in contrasting the pre- and post-retirement populations, in describing the executive population, and in exploring differences among organizations?

Research in social psychology has shown that the behavior of other people has a vast influence both upon our responses in the here and now and upon our readiness to respond to given stimuli at a later time. Given any set of social inputs over time, one associated set of behaviors or predispositions is most probable. Changes in this set of social inputs, when other variables are held constant, will result in changes in the probability of anticipated behaviors. The question with regard to the retiring executive is this: Do the objective changes in social situation brought on by his separation from his work role result in stimulus configurations which are EFFECTIVELY different from those encountered before retirement? If so, one would expect the behavioral effects to occur which typically reflect the perceived presence of given social stimulus patterns. These can be immediate and overt or they can be more permanent and unobservable until an appropriate stimulus occasion arises. And while both are important and relevant to behavioral theory, our interests here lie primarily in the latter type of effect.

One might expect that the extent to which the executive will be able to interact adequately with his post-retirement environment will be determined largely by the adequacy of his frames-of-reference and response sets. Consequently, the focus here will be upon the relatively persistent

effects of changed social inputs, ones which can be expected to influence the executive's post-retirement life in some relatively consistent and long-term manner. Measures will be taken of behavioral predispositions as they are developed, maintained, and modified by social interaction. We're concerned with social phenomena which effect relatively permanent marks on the behavioral shape of the organism and on its contribution to response.

The concept of "personality" is really not so much professional or scientific as it is popular. While it's a rather useful word in ordinary conversation, we don't have to go far in professional or scientific activity before the ambiguity, imprecision, and over-loading of connotations that it shares with most of popular language begins to cause serious difficulties. In one of its general usages, however, it refers to some collection of the more persistent and pervasive predispositions of the organism. And while the operational decision of which predispositional measures to include under the concept is a rather arbitrary one, several widely used measures exist which have identified reliable and relatively independent dimensions. Such measures are typically used for descriptive and comparative purposes and it is for these purposes that they could be useful here. Several "personality" dimensions have proven to be quite stable over time, leading us to expect that consistent differences between pre- and post-retirement populations would be reflected in personality measures only if existing differences are fundamental and significant, only if the effects of retirement are really quite massive.

In social psychology, with a somewhat different and more cognitive orientation, the most popular concept covering predispositional phenomena has been "attitude". Rokeach (1966) has defined an attitude as a "learned

and relatively enduring organization of beliefs about an object or situation disposing a person toward some preferred response". While the concept of attitude is an important one which is related to behavior in important ways, it is a bit too specific for our exploratory purposes. A person typically has many dozens, even hundreds, of attitudes and we have no real way of knowing at this point which among these would be significantly related to the psychology of retirement. Our purposes would be better served at this point by a measure of some more fundamental entity upon which attitudes depend. The concept of "value" would be more appropriate. A value can be seen as the "core component of a clustering of attitudes which direct behavior on a long-range basis toward some goals in preference to others (Hollander, 1967)". A measure of values would delve deeper and should detect cognitive activity on a more fundamental level than would measures of attitudes. It should detect, if not the tide (like measures of personality), at least the current and not the ripples. And again, measures of values would be expected to detect pre- vs. post-retirement differences only if such differences are in fact rather significant and fundamental. One might expect, however, that these measures would be more sensitive to relatively less massive changes than would the measures of personality discussed above.

During the past twenty years or so, instruments have been developed which can be described roughly as measures of a tendency of the personality toward rigidity or flexibility in interacting with the environment (Adorno, et al., 1950; Rokeach, 1960). Some research has suggested that such a factor might be rather fundamental, influencing behavior in characteristic ways even in such an apparently unsuspected phenomenon as perception (Witkin, 1959). This could also be an important factor for study

in the executive population, since it might also express itself in the ease or difficulty with which an executive adjusts to the changes precipitated by retirement.

The predispositions discussed above are likely to be among the most important for our purposes and it would seem that measures of them should be taken so that relevant comparisons can be made. In addition, however, several other types of data might prove to be useful and suggestive.

1. A systematic measure of the executive's subjective assessment of well-being would be useful for investigating the effects of retirement on executive "happiness". In addition, it would be instructive to know what other variables are related to this assessment. Differences between pre- and post-retirees might express themselves either in terms of means or variances. If retirement has totally negative or totally positive effects, one would expect differences in means. On the other hand (and this seems more likely), if retirement does have an effect on this variable, but if the effect is mediated by moderator variables, one would expect that the post-retiree group would produce more heterogeneous measurements than the pre-retiree group.
2. This study will attempt to provide some systematic data in order to help establish baselines which have not been available to this time. And while the use of psychometric instruments as discussed above is very important in this regard, it is also true that such instruments have been developed for other or more general purposes and not for the special problems of executive retirement. Therefore, one would expect that clues useful for the design of further studies might emerge through the use of rather unsystematic probing, such as in a relatively unstructured inter-

view. The interview would also offer an opportunity to collect information about the executive's present and intended activities, affiliations, engagements, etc., and the extent to which they relate to life-continuity.

3. Finally, rather extensive demographic material and personal as well as career background information would be useful for describing the executive population as well as for comparing the executives as organizational inputs.\*

#### Summary of Expectations

1. Executive values should differ more across organizations than within organizations.
2. Post-retiree values should be more homogeneous than pre-retiree values.
3. Inter-organizational differences in executive demographic or background "input" characteristics should not be great enough to account for number 1, above.
4. Differences between pre-retiree and post-retiree values should be greater than comparable differences on personality dimensions.
5. Post-retirees should be more heterogeneous than pre-retirees in their subjective assessments of well-being.

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\*See page 29

### CHAPTER THREE: METHOD

Subjects in this study were assigned to treatment categories by self-selection and independent variables were not under the control of the investigator. Therefore, the design is ex post facto, not experimental, and causal relationships cannot be determined. The inquiry is capable only of uncovering some of the more dominant correlational associations among variables and the interpretation of findings must be appropriately limited.

In general, it can be said that the investigation involved 1) the gathering of historical-personal data, 2) interviewing to review the professional careers and retirement expectancies of executives, and 3) the administration of psychometric instruments to provide a baseline of data. One of the study's primary focuses was upon executive predispositions, but since the concept of "predisposition" is not easily partitioned into subconcepts which have corresponding independent empirical referents, it is difficult to know at this point which measures would be both relevant and non-redundant. It was decided that a variety of instruments would be used as a preliminary probe.

#### Design

While small samples make it less likely that conventional significance levels will be reached in comparisons of pre- and post-retirees, i.e., that real differences will be detected, this study was faced with practical limitations of time and resources which necessarily limited the number of executives that could be included. But since the study is

exploratory and includes the collection of a wide variety of data, it was thought that existing differences of an important nature might still be likely to express themselves on at least some of the measures taken.

The original plan was to select five pre-retirees and five post-retirees, all within five years of retirement, from each of five organizations differing in a number of objective respects. Sample attrition, however, made it necessary to reduce the total sample size from fifty to forty, with four pre-retirees and four post-retirees in each case (Table 3). In addition, circumstances did not permit selecting executives precisely within the original age boundaries (See Table 33).

Table 3. Distribution of the Executive Sample\*

	<u>Organization</u>				
	<u>I</u>	<u>II</u>	<u>III</u>	<u>IV</u>	<u>V</u>
Pre-(A)	4	4	4	4	4
Post-(B)	4	4	4	4	4

\*Cell entries refer to numbers of subjects.

#### Sampling Procedure

Five organizations were selected for participation in the investigation and official willingness to cooperate was secured from appropriate officers in each case. The initial selection was made in order to provide a seemingly reasonable cross-section of organizations on certain objective criteria (size, function, history, etc.). The final selection was determined by availability and willingness to participate. All five organizations are located principally in the Midwestern United States. Three are engaged primarily in manufacturing, one in retailing, and the fifth is a major government civil service organization. A fuller description of each is provided in Table 4.

Table 4. Descriptions of Organizations Participating in StudyOrganization I:

One of the world's largest industrial organizations; engaged in heavy manufacturing. Several thousand employees; highly differentiated functions; exceedingly complex organizational structure. Organization has existed for several decades; has divisions throughout the world; principle location in one of largest American cities, from which executive sample was drawn.

Organization II:

One of the nation's largest retailing organizations. Organization has existed for several decades. Operations spread through considerable geographical area; primary operations in one of largest American cities, from which executive sample was drawn.

Organization III:

Large civil service organization in the Midwest. Many professional personnel. Headquarters in a medium-sized Midwestern city, from which executive sample was drawn.

Organization IV:

Medium-sized industrial organization engaged in the manufacture of consumer products. Organization has existed in present form for approximately a quarter century. Primary operations in small Midwestern city, from which executive sample was drawn.

Organization V:

Medium-sized industrial organization engaged in the manufacture of consumer soft-goods. Family organization which has existed for several decades. Primary operations in very small Midwestern town, from which executive sample was drawn.

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After official sanction had been secured from each organization, an organizational representative, in each case, was enlisted to search out both pre- and post-retirees who might be interested in participating in the study. The representative then contacted each executive, briefly explaining the purpose of the investigation and explaining that partici-

pation was entirely voluntary. Those executives who expressed a willingness to cooperate were told that they would be contacted by the investigator within a short time. A list of names, addresses, and telephone numbers was provided.

### Data Collection

Approximately ten months were spent in the scheduling of interviews, in the interviewing itself, and in acquiring psychometric data for the study. A letter of introduction was first sent to each executive (as shown in Appendix A) which explained the purpose of the study, outlined the contribution required from each participant, and suggested a date and time during which he could be interviewed. This letter was followed later by a telephone call in which the suggested interview time was either confirmed or a more convenient time scheduled.

Two interviewers were involved in most of the sessions, which typically lasted from two to two and one-half hours. On two occasions, however, unpredictable circumstances made it impossible for one of the interviewers to be present.\*

A list of questions had been prepared for use in the interviews, but it was soon found that the most workable procedure seemed to be one in which the executive was simply asked to review his life and career informally, beginning with his birth. In the process of doing this, responses to nearly all of the questions would arise and, if further information or clarification were necessary, the interviewers would interrupt the narrative and ask that it be provided. In most cases, one interviewer asked most of the questions and most actively responded to the

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\*Subsequent analysis suggested no reason to believe that this affected the data in any appreciable way. Neither did the interview sessions themselves appear to differ to any noticeable extent. It appeared that the major advantage secured in the use of two interviewers was one of convenience.

executive's contributions, while the other spent the majority of his time taking notes.

The sessions were quite informal with the first ten minutes or so usually devoted to the exchange of pleasantries and the establishment of informal and relaxed interaction, which continued to prevail throughout. There was reason to believe that the executives genuinely enjoyed the sessions and that they responded frankly and in an unguarded manner.

The interview sessions were terminated by leaving a packet of pencil and paper instruments which the executive was asked to complete and return in a stamped, self-addressed envelope. In the majority of the cases, these materials were returned within a week. In some, however, a follow-up letter was necessary in order to stimulate their return and, in a few cases, they were never returned. The latter cases account for the sample attrition mentioned above.

### Instruments

The instruments for gathering data which were used in this study are described below. With the exception of number 1, all of the items were completed by the executive at his convenience and returned to the investigator by mail.

#### 1. The Interview

The original list of interview questions shown in Appendix B-1 was formulated not so much to elicit "yes" or "no" types of answers as to stimulate expression and comment in areas relating to the executive's formative years, his early career and life, and his later years. However, as indicated above, the subjects proved to be essentially "self-stimulating". They managed, quite

spontaneously, to provide a good deal of the "stream-of-consciousness" material (emotional, reflective, reminiscent), largely free associational, which could later be coded and searched for clues useful in the future development of more systematic measures.

## 2. Career Summary Sheet

This item (Appendix B-2) was used as a source of demographic and background data as well as of data to be coded in association with that from the interviews.

## 3. California Psychological Inventory (1957)

This is one of the most widely used psychometric tests of general personality for use with normals. It is composed of 480 items from which eighteen scales have been developed. These deal primarily with characteristics important for individual capacity for effective social interaction. The scales have been grouped into four categories which give some indication of the psychometric clustering that has been found to occur. Verbal labels for the scales as well as their abbreviations are shown in Table 5.

## 4. Allport-Vernon-Lindzey: Study of Values (1960)

Like the CPI, this instrument has been used for some time in a variety of contexts and considerable related research has been reported in the literature. It is a measure of the RELATIVE dominance of six "interests or motives in personality" based upon a conceptual classification originated by Spranger.\* It does not provide absolute measures of these values, but only

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\*See references

their standing relative to one another. The six values are shown in Table 6.

Table 5. Scales From the California Psychological Inventory\*

Class I. Measures of Poise, Ascendancy  
and Self-Assurance

1. Do	Dominance
2. Cs	Capacity for Status
3. Sy	Sociability
4. Sp	Social Presence
5. Sa	Self-Acceptance
6. Wb	Sense of Well-Being

Class II. Measures of Socialization,  
Maturity, and Responsibility

7. Re	Responsibility
8. So	Socialization
9. Sc	Self-Control
10. To	Tolerance
11. Gi	Good Impression
12. Cm	Communality

Class III. Measures of Achievement Potential  
and Intellectual Efficiency

13. Ac	Achievement via Conformance
14. Ai	Achievement via Independence
15. Ie	Intellectual Efficiency

Class IV. Measures of Intellectual and Inter-  
est Modes

16. Py	Psychological-Mindedness
17. Fx	Flexibility
18. Fe	Femininity

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\*Source: California Psychological Inventory. Manual. Palo Alto, California: Consulting Psychologists Press, Inc., 1957.

5. Rokeach Value Scale\*\*

This is a more recently developed measure of values than the one discussed above and is related to Rokeach's general theoretical formulations (1960; 1966). A distinction is made between "terminal" and "instrumental" values, a distinction that has long

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\*\*See references

been in the culture in philosophical value theory, etc. The instrument consists of two lists of eighteen values each, one terminal and one instrumental (See Appendix B-3). The subject is asked to rank the values on each list in order of their importance to him, i.e., most important number one, second most important number two, etc. Rokeach's approach incorporates the use of more specific verbal labels than does that of Allport, et al. In addition, it is more behavioral, more operant. The two measures might complement one another rather nicely in exploratory research such as this.

Table 6. Scales From Allport-Vernon-Lindzey: Study of Values\*

1. The Theoretical  
Relates to an interest in the discovery of truth
2. The Economic  
Relates to an interest in what is useful.
3. The Aesthetic  
Relates to an interest in form and harmony
4. The Social  
Relates to the love of people
5. The Political  
Relates to an interest in power
6. The Religious  
Relates to an interest in unity, the comprehension of the cosmos as a whole

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\*Source: Allport-Vernon-Lindzey, Manual. Study of Values.  
Boston: Houghton Mifflin Company, 1960.

#### 6. Rokeach Dogmatism Scale (1960)

The development of the Rokeach Dogmatism Scale represented an extension of the work of Adorno, et al. (1950). The result is considered to be a measure of "closed-mindedness" independent

of ideology. The highly dogmatic individual is one who has a tightly organized belief system, usually derived from authority. A characteristic feature of dogmatism is rigidity in the psychological field. That is, the highly dogmatic individual is more resistant to the acceptance of information contradictory to his belief system than is the less dogmatic individual.

#### 7. Life-Satisfaction Index

Neugarten, et al., (1961) point out that there have been two general approaches to the measurement of "successful aging". One has involved the use of measures of overt behavior, focusing on range and level of activities and the extent of social participation. It generally carries at least the implicit assumption that "the less an individual varies from the pattern of activity that characterized him in middle age, the greater is his well-being". The other approach has focused upon the individual's "internal frame of reference, with only secondary attention given to his level of social participation".

As indicated earlier, our purposes are not served at this point by making value judgments about the adequacy or inadequacy of the executive's adjustment to retirement. Moreover, under the circumstances of this study, sufficient and appropriate data were not available for such judgments. It is appropriate, however, to have some measure of the executive's well-being for pre-retirement vs. post-retirement comparisons, inter-organizational comparisons, etc.

The Life-Satisfaction Index, developed by Robert Havighurst and

others, is a measure of the individual's own evaluations of his well-being. It is constructed in two parts and yields both individual and combined scores. Since subjective reports such as this are extremely vulnerable to conscious and unconscious defenses, however, it is necessary that the instrument be validated against some independent criterion. Neugarten, et al. (1961) investigated the relationship of the instrument to life-satisfaction ratings from a group of independent raters as well as from a trained clinical psychologist. These correlations, as well as others of pertinence, are shown in Table 7. In addition, it was found that agreement between the clinical psychologist and the other raters was higher for older respondents than for younger ones. Similar findings were reported in relation to the Index itself. For persons under 65, the clinical psychologist's ratings correlated .05 with Part I of the Index and .32 with Part II. However, for respondents over 65, the respective correlations were .55 and .59. In general, it appears that the Life-Satisfaction Index can be of value in this study if used with prudent caution. It is shown in Appendix B-4.

Table 7. Coefficients of Correlation  
for Various Measures of Life-Satisfaction

	1	2	3	4	5	6
1. Raters' Ratings	---	.64	.55	.58	.39	-.07
2. Clinical Psychologist's Ratings	---	---	.39	.47	.21	.09
3. Life-Sat. Index, Part I	---	---	---	.73	.36	-.10
4. Life-Sat. Index, Part II	---	---	---	---	.41	-.07
5. Socioeconomic Status	---	---	---	---	---	---
6. Age	---	---	---	---	---	---

\*Source: Neugarten, B. I., Havighurst, R. J., and Tobin, S. S. The Measurement of Life Satisfaction. Journal of Gerontology, 1961, 16, 142.

## 8. Background Information

Thirty-five items were taken from an instrument designed for an earlier and unrelated study (Frost, et al., 1968) to supplement the background and demographic information obtained from the interview and the Career Summary Sheet. The items (Appendix B-5) were chosen because of their availability and because of a desire to collect a wide array of background information for preliminary exploration.

### Scoring

The following is a brief summary of the scores and scoring procedures used in the study.

#### 1. The Interview and Career Summary Sheet

Material recorded during the interviews and material from the Career Summary Sheets was content-analyzed in terms of a number of pre-established categories. The resulting data were then tabulated and made available for comparison and analysis by ordinary means. Residual interview material was searched for additional items of interest.

#### 2. California Psychological Inventory

The instrument produces eighteen scores, one for each of eighteen measured dimensions. The specific metrical and analytical techniques involved in the development of these scales is explained in detail in the test manual.

#### 3. Allport-Vernon-Lindzey: Study of Values

This instrument produces six scores, one for each of six values represented. The specific procedures used in the development of

the instrument as well as the high degree of dependency among the resulting scores is explained in the test manual.

4. Rokeach Value Scale

Since the subjects are asked to rank the values in each one of the two lists, the position of each value in each case can be represented by a single numerical score.

5. Rokeach Dogmatism Scale

The scale consists of forty items and the subject is to respond to each on a seven-point scale. Individual items scores are then summed, resulting in a total score for each subject. Higher scores indicate the greater degree of dogmatism.

6. Life-Satisfaction Index

A scoring key is provided in Neugarten, et al. (1961). The instrument produces scores for both Part I and Part II and a total score can be produced by simply summing the scores from the two parts.

7. Background Information

The responses for each of the items were tabulated in the ordinary manner.

Analysis

Because of the small sample sizes and because of the exploratory nature of the study, a good deal of the data were simply analyzed by inspection. In other cases, however, conventional statistical techniques were used, such as the product-moment correlation, the analysis of variance, etc.

## CHAPTER FOUR: RESULTS

The results of the investigation will be reviewed according to the following outline.\*

- I. Background-Demographic Information (Background Information Questionnaire, Interview, Career Summary Sheet)
  - A. Description of the Executive Sample
  - B. Pre-Retirement vs. Post-Retirement Samples
  - C. Inter-organizational Comparisons
- II. Personality (CPI, Rokeach Dogmatism Scale)
  - A. Description of the Executive Sample
  - B. Pre-Retirement vs. Post-Retirement Samples
  - C. Inter-organizational Comparisons
- III. Values (Allport-Vernon-Lindzey: Study of Values, Rokeach Value Scale)
  - A. Description of the Executive Sample
  - B. Pre-Retirement vs. Post-Retirement Samples
  - C. Inter-organizational Comparisons
- IV. Life-Satisfaction (Havighurst Life-Satisfaction Index)
  - A. Description of the Executive Sample
  - B. Pre-Retirement vs. Post-Retirement Samples
  - C. Inter-organizational Comparisons

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\*Differences which reach conventional significance levels are indicated in footnotes. Also, unless otherwise indicated, N=20 for pre-retirement sample and N=20 for post-retirement sample in pre- vs. post-retirement comparisons.

I. Background-Demographic Information (Background Information Questionnaire, Interview, Career Summary Sheet)\*

A. Description of the Executive Sample

The selection of the executive sample was guided by a desire to include individuals whose organizational roles imply responsibility for a significant portion of organizational resources. Differences in organizational structure as well as the problem of securing sufficient numbers of persons meeting the pre- or post-retirement criterion requirements (See page 35) did result in a certain amount of variability among executives with regard to their respective echelon positions. However, it can be said that the majority of those participating either were or are at or near the president/vice-president levels.\*\*

For the most part, the executives in the sample grew up in the Midwestern United States (Table 8), however, considerable variability exists with regard to the characteristics of the specific locations (Tables 9, 10, and 11).

Table 8. Area of the Country Lived in Before Age 18

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
The Northeast	.05	.15	.10
The South	---	.10	.05
The Middle West	.95	.65	.80
The Pacific Coast	---	---	---
Outside the U.S.	---	.10	.05
Total	1.00	1.00	1.00

A substantial portion of the executives' parents were immigrants (Table 12) and, while a sizeable proportion of the executives come from business families, the greatest number of them

\*Proportions shown in tables often do not sum to 1.0 because of rounding.

\*\*Roles with comparable responsibility either for human or physical resources were represented in the civil service organization.

grew up in families in which the father was either a semi-skilled or skilled worker (Table 13). Over half of the executives' parents received less than a complete high school education (Table 14).

**Table 9. Location in Which Most of Early Life Was Spent**

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Farm	.20	.24	.22
Town, Under 2,000	.30	.10	.20
Town, 2,000-10,000	.10	.24	.17
City, 10,000-100,000	.10	.24	.17
City, 100,000 and over	.30	.19	.24
Total	1.00	1.01	1.00

**Table 10. Home Town's Main Source of Income**

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Agriculture	.30	.18	.24
Industry, Mfg.	.25	.54	.40
Wholesale, Retail, Tourist	.05	.09	.07
Petroleum or Mining	.10	---	.05
Diversified	.30	.18	.24
Total	1.00	0.99	1.00

**Table 11. Section of Town Lived In While Growing Up**

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Exclusive Section	.05	.11	.08
Good, but not Best	.35	.37	.36
Average Section	.45	.21	.33
Poorer Section	---	.05	.03
Lived in Rural Area	.15	.26	.21
Total	1.00	1.00	1.01

**Table 12. Birthplace of Parents**

	<u>Father</u>		<u>Mother</u>	
	<u>U.S.</u>	<u>Foreign</u>	<u>U.S.</u>	<u>Foreign</u>
Pre-	.75	.25	.80	.20
Post-	.60	.40	.60	.40
Total	.68	.32	.70	.30

Table 13. Father's Chief Occupation

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Unskilled Worker	.05	.05	.05
Semi-skilled or Skilled Worker	.45	.37	.41
Sales or Office Work	---	---	---
Supervisory Work	.05	.11	.08
Sub-professional (bookkeeper, pharmacist, draftsman, etc.)	---	.11	.05
Scientist (geologist, engineer, chemist, etc.)	---	---	---
Professional	.10	.05	.08
Businessman	.35	.21	.28
Executive of large business or industry	---	.11	.05
Total	1.00	1.01	1.00

Table 14. Formal Education Completed by Parents

	<u>Father</u>			<u>Mother</u>		
	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
6 yrs. or less	.21	.30	.26	.16	.26	.21
7 yrs.	---	.05	.03	---	---	---
8 yrs.	.21	.35	.28	.21	.32	.26
9 yrs.	---	.05	.03	---	.05	.03
10 yrs.	.05	.05	.05	.05	.11	.08
11 yrs.	---	---	---	.05	---	.03
12 yrs.	.26	.05	.15	.21	.26	.24
Some College	.16	.05	.10	.11	---	.05
College	.11	.10	.10	.16	---	.08
Graduate Work	---	---	---	.05	---	.03
Total	1.00	1.00	1.00	1.00	1.00	1.01

Tables 15 through 20 and 23 through 27 provide a portrait of the executive's early home life. Most of the executives reported growing up in homes in which both parents were present (Table 15) and it appears that these were in most cases patriarchal, at least with regard to major decisions (Table 16). Eighty-two percent of the sample claimed that their upbringing had been strict but fair (Table 17).

Table 15. Parents Living Together While Executive Grew Up

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Yes	.65	.85	.75
No, Because One Died	.25	.10	.18
No, Because Both Died	.05	---	.03
No, Because They Separated	.05	---	.03
No, Because They Were Divorced	---	.05	.03
Total	1.00	1.00	1.02

Table 16, Who Made the Major Decisions in Family

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Mother	.15	.09	.12
Father	.60	.76	.68
Some Other Person	.05	---	.03
Discussion and Common Agree- ment	.20	.14	.17
Some Other Method	---	---	---
Total	1.00	0.99	1.00

Table 17, Type of Upbringing

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Strict But Fair	.80	.83	.82
Strict But Unfair	.05	---	.03
Inconsistent	---	---	---
Not Very Strict	.15	.17	.16
Almost No Discipline	---	---	---
Total	1.00	1.00	1.01

The role played by religion in the executive's early family life can be explored in Tables 18, 19, and 20. There is a high degree of correspondence between the executive's early religious affiliations as he recalls them and his recalled perception of the emphasis religion received in the home (Tables 18 and 19). This portion of the acculturation process is also illustrated by a rather high degree of intra-family harmony in religious matters as evidenced in Table 20. These data can be compared with reports of present religious activity in Table 21 and Table 22 which shows the relative proportions of executives presently claiming preference for the religions shown. The entire sample responded with one of these three in an open-end item, and none in addition to these were indicated.

Table 18, Role of Religion in Early Home Life

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
An Essential Part of Home Life	.30	.45	.38
One of Several Factors Which Were Important	.60	.40	.50
A Relatively Unimportant Factor	.05	.15	.10
Something to be Left Out of Our Family Life	---	---	---
One's Own Business	.05	---	.03
Total	1.00	1.00	1.01

Table 19. Executive's Religious Participation as a Young Man

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Church Member and Active in Church Activities	.40	.40	.40
A Nominal Church Member	.55	.45	.50
A Religious Rebel	---	.05	.03
A Non-Churchman Without any Great Religious Conviction	.05	.10	.08
Total	1.00	1.00	1.01

Table 20. Early Agreement With Parents on Matters of Religion

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Were in Close Agreement	.25	.53	.38
Usually Felt the Same on Important Matters	.70	.42	.56
Disagreed on Most Important Matters	.05	---	.03
Disagreed Completely	---	.05	.03
Total	1.00	1.00	1.00

Table 21. Present Frequency of Attendance at Religious Services

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Twice or More a Week	.10	.10	.10
Every Week	.45	.40	.43
Once or Twice a Month	.20	.35	.28
On Special Occasions (Such as Easter)	.20	.10	.15
Do Not Attend Services	.05	.05	.05
Total	1.00	1.00	1.01

Table 22. Present Religious Preferences

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Catholic	.15	.05	.10
Jewish	.05	---	.03
Protestant	.80	.95	.88
Total	1.00	1.00	1.01

Tables 23 through 26 display data relating to early activities and interests of the respondents. Interestingly, it appears that most of the executives in the sample did not participate predominantly in conventional organizational activities during their school days (Table 23).

Table 23. Predominate Activity During School Days

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Sand-lot Games	.32	.52	.41
Boy Scouts, 4-H Clubs, FFA, or YMCA	.20	.08	.15
Student Government, School Politics	.08	.04	.07
Student Paper, Science Clubs	.04	.04	.04
Worked or Studied Most of the Time and Did Not Participate	.36	.28	.33
Total	1.00	0.96	1.00

Table 24. Encouragement From Parents During Teens

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Choose Friends Carefully	.32	.27	.30
Continue Education	.35	.46	.40
Read Good Literature	.13	.04	.09
Save Money	.19	.19	.19
None of These	---	.04	.02
Total	0.99	1.00	1.00

Table 25. Number of Books Around House During Executive's Youth

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
A Large Library	.05	---	.03
Several Bookcases Full	.40	.40	.40
One Bookcase Full	.25	.20	.23
A Few Books	.25	.35	.30
Only a Few Children's Books	.05	.05	.05
Total	1.00	1.00	1.01

Tables 26 and 27 provide an interesting contrast. Nearly twice as many executives reported meeting friends most often at friends' homes during their youth, as reported meeting at their own homes. However, almost exactly the opposite is reported for the present.

Table 26. Most Frequent Location for Meeting Friends During Youth

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
At a Friend's Home	.58	.42	.50
At a Club, Dance Hall, or Public Building	.08	.08	.08
At Own Home	.27	.27	.27
At the Corner	---	.15	.08
At Church Activities	.08	.08	.08
Total	1.01	1.00	1.01

Table 27. Most Frequent Location for Meeting Friends at Present

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
At Own Home	.57	.58	.58
At a Friend's Home	.25	.16	.21
At a Church or Club	.18	.16	.17
At a Theatre, Restaurant, or Other Public Place	---	.08	.04
Total	1.00	0.98	1.00

Nearly half of the executive sample indicated that they generally tried to hide their feelings when they were angry during their youth (Table 28).

Table 28. Response to Anger in Youth

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Fighting	.12	.17	.14
Kicking or Throwing Something	.06	.24	.14
Swearing	---	.06	.03
Talking it Over With Someone	.44	.12	.28
Trying to Hide Feelings	.38	.44	.42
Total	1.00	1.03	1.01

Tables 29 through 31 review the educational background of the executive sample. Approximately two-thirds of the respondents completed college and approximately one-third of the sample did some graduate work. The mean number of years of completed formal education for the entire sample was 15.53 (Table 30). The distribution of highest degrees completed is shown in Table 30. In general, it appears that most of the respondents have not maintained close social relationships with those whom they knew during their school years (Table 32).

Table 29. Type of School Attended Between the Ages of 12 and 18

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Private or Parochial	.10	.05	.07
Public	.90	.90	.90
Vocational or Trade	---	.05	.03
Total	1.00	1.00	1.00

Table 30. Formal Education Completed by Executives\*

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
6 yrs. or less	---	---	---
7 yrs.	---	.05	.03
8 yrs.	---	.05	.03
9 yrs.	---	---	---
10 yrs.	.05	---	.03
11 yrs.	.10	---	.05
12 yrs.	.10	.15	.13
Some College	.10	.05	.08
College Graduate	.35	.35	.35
Graduate Work	.30	.35	.33
Total	1.00	1.00	1.03
Mean Years Completed	15.75	15.30	15.53
Standard Deviation	3.02	3.24	3.13

\*Highest level completed is shown

Table 31. Highest Degrees Attained

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Less Than High School	.10	.10	.10
High School	.20	.20	.20
Bachelor's Degree	.40	.20	.30
Master of Arts	.15	.15	.15
Master of Business Administration	.05	.15	.10
Doctor of Jurisprudence (or L.L.B.)	.05	.05	.05
Doctor of Medicine	.05	---	.03
Other Beyond High School	---	.15	.08
Total	1.00	1.00	1.01

Table 32. Extent Still Friendly With People Known in School

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Not At All	.05	.04	.05
Friendly With a Few on Rare Occasions	.29	.38	.33
Friendly With Some, but See Them Irregularly	.43	.38	.40
See Some Regularly	.14	.14	.14
Close Friends to Quite a Few	.10	.04	.07
Total	1.01	0.98	0.99

Several of the following tables explore the present personal circumstances of the executive sample. The mean age of the entire sample is 64.33 (Table 33), which is interesting in light of the fact that the sample somewhat exceeds the originally intended five year pre- and five year post- range.

Table 33. Age of Executives

	Mean*	Standard Deviation**
Pre-retirees	60.80	1.60
Post-retirees	67.85	4.99
Total	64.33	3.30

\*Difference Between Means:  $p \leq .01$ \*\*Difference Between Variances:  $p \leq .02$ 

Table 34. Present Marital Status

	Pre-	Post-	Total
Single	---	---	---
Married, No Children	.20	.10	.15
Married, One or More Children	.80	.85	.83
Widowed	---	.05	.03
Separated or Divorced	---	---	---
Total	1.00	1.00	1.01

Table 35. Mean Number of Children

Pre-retirees	2.0
Post-retirees	1.8
Total	1.9

The typical executive in the sample reports good health in the past and continued good health at present (Table 36).

Table 36. Reported Health

	Present Health		Health History	
	Good	Fair	Good	Fair
Pre-retirees	.80	.20	.70	.30
Post-retirees	.75	.25	.75	.25
Total	.78	.25	.73	.28

A considerable degree of mobility has marked the lives and careers of even this older generation of executives, as can be seen from Table 37.

Table 37. No. of Different Cities, Towns, or Townships Lived In

	Pre-	Post-	Total
1 to 3	.25	.30	.28
4 to 6	.45	.20	.33
7 to 9	.10	.25	.18
10 to 12	---	.15	.08
13 or more	.20	.10	.15
Total	1.00	1.00	1.02

Table 38 indicates that nearly all of the executives presently live in their own houses and Tables 39 and 40 offer a comparison of present living circumstances with those which are considered preferable.

Table 38. Type of Housing Presently Lived In

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Rented Apartment	.05	.05	.05
Rented House	.05	.05	.05
Own House	.90	.90	.90
Total	1.00	1.00	1.00

Table 39. Type of Community Presently Lived In

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
In the Country	.05	.15	.10
Town of Less Than 2,000	.05	.10	.08
Town of 2,000 or More, but Less Than 10,000	.15	.10	.13
City of 10,000 to 100,000	.55	.35	.45
City Larger Than 100,000	.20	.30	.25
Total	1.00	1.00	1.01

Table 40. Size of City Preferred

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Rural or Country	.20	.10	.15
5,000 or Less	.05	.20	.13
5,000 to 50,000	.35	.35	.35
50,000 to 200,000	.25	.30	.28
200,000 or More	.15	.05	.10
Total	1.00	1.00	1.01

While it appears that one's location in a higher-echelon position is certainly no assurance that money cannot or will not be a problem, a majority of the total sample indicated in the interview that they were not actively concerned with money and that financial matters were not likely to be a problem (Table 41). Only ten percent of the total sample indicated that their financial resources were inadequate for retirement (Table 42), but many expressed concern and doubt because of what they saw as a serious and unpredictable

inflationary situation. Table 43 offers an indication of how the executives in the sample would use a substantial inheritance at this point.

Table 41. Expression of Concern About Money

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Actively Concerned	.50	.05	.27
Not Actively Concerned	.50	.95	.73
Total	1.00	1.00	1.00

Table 42. Feeling About Adequacy of Financial Resources For Retirement

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Extremely Adequate	.05	.20	.13
Quite Adequate	.65	.65	.65
Average	.20	.05	.13
Quite Inadequate	.10	.10	.10
Extremely Inadequate	---	---	---
Total	1.00	1.00	1.01

Table 43. What Executives Would Do With Largest Share of Sudden Tax Free \$50,000 Inheritance

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Pay Off a Mortgage	---	---	---
Put it in a Savings Account	.13	---	.07
Buy a New Car or New House or Make Some Other Major Purchase	.04	---	.02
Take a Vacation Trip Out of the Country	.09	.11	.10
Invest in "Blue-Chip" Stocks or Bonds	.43	.50	.46
Invest in More Speculative Stocks or Bonds	.04	.11	.07
Some Combination of the Above	.22	.28	.24
Don't Know	.04	---	.02
Total	0.99	1.00	0.98

It's interesting to note that, even at their relatively late stage in life, almost one-third of the executive sample reported having more than one person financially dependent upon them (Table 44).

Table 44. Present Dependents (Not Including Self)

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
None	---	.05	.03
One Person	.55	.80	.68
Two or Three Persons	.25	.10	.18
Four or Five Persons	.20	.05	.13
More Than Five	---	---	---
Total	1.00	1.00	1.02

Tables 45 and 46 show the executive's reported relationship to alcohol and gambling.

Table 45. Frequency of Drinking Beer, Wine, or Liquor

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Never	.10	.10	.10
Daily	.43	.40	.41
Weekly	.10	.30	.20
Monthly	.14	---	.07
Very Few Times a Year	.25	.20	.22
Total	1.02	1.00	1.00

Table 46. Attitude Toward Gambling

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
It is Stupid	.14	.35	.24
It is Morally Wrong	---	---	---
It is Exciting	.04	.05	.05
It is a Good Recreation	.19	---	.10
Can Take It or Leave It	.61	.60	.61
Total	0.98	1.00	1.00

It appears that considerable variability exists among executives with regard to the types of factors that have been significant in determining what their life's work would be. Table 47 shows the tabulation of responses.

Table 47. Factors Most Influencing Choice of Occupation

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Family	.08	.33	.18
Expected Income	.19	.11	.16
Friends	.08	.06	.07
Job Opportunities	.23	.28	.25
Counselors	---	---	---
Training Opportunities	---	---	---
Desire to Aid Humanity	.08	---	.05
Accomplishment of an Ideal in Work	.19	.06	.14
An Admired Person	.15	.17	.16
Total	1.00	1.01	1.01

Several executives offered anecdotes about individuals who were particularly significant in determining the direction of their careers. From Table 48, it does not appear that the executive's wife plays any consistent role in her husband's career. A similar distribution of responses resulted when respondents were asked if there had been any significant determining event, such as a significant failure, which had influenced their direction (Table 49).

Table 48. Importance of Wife in Career

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Wife a Determining Influence	.50	.50	.50
Wife Not a Determining Influence	.50	.50	.50
Total	1.00	1.00	1.00

Table 49. Critical Experience Influencing Career

	<u>Pre-</u>	<u>Post-</u>	<u>Total</u>
Had a Single Determining Experience	.45	.50	.47
Did Not Have a Single Determining Experience	.55	.50	.53
Total	1.00	1.00	1.00

The tenure of respondents in their present or immediate pre-retirement organizations is shown in Table 50. In addition, the proportion of this time that has been spent in positions of critical responsibility is shown. Executives averaged approximately

18 years in such top-level positions.

Table 50. Length of Service in Organization and Length of Service in Higher-Echelon Positions

	Mean Years in Organization	Mean Proportion in Higher Echelon	S.D.
Pre-Retirees	30.8	.57	.27
Post-Retirees	31.2	.58	.25
Total	31.0	.58	.26

Table 51 deals with the sources of the executive's reinforcements. Respondents were more likely to report receiving satisfying recognition in connection with their jobs than they were in connection with activities off the job. The executive's assessment of off-job accomplishments is shown in Table 52. Over half of the sample saw their major accomplishments associated with family activities.

Table 51. Recognitions Received

	On-Job		Off-Job	
	Yes	No	Yes	No
Pre-Retirees	.55	.45	.35	.65
Post-Retirees	.85	.15	.45	.55
Total	.70	.30	.40	.60

Table 52. Major Accomplishments Outside of Work

	Pre-	Post-	Total
Family Activities	.56	.57	.57
Community Activities	.13	.19	.16
Development of Self	.17	.05	.11
Development of Social Activities	.04	---	.02
Something Else	.08	.19	.14
Total	0.98	1.00	1.00

One of the most strikingly consistent observations in this study was the nearly universal tendency of the respondents to spend a disproportionate amount of interview time on early life and work periods. When asked to start at the beginning and review both life and career, the modal executive would proceed to

describe events in childhood, in his school life, and in the early part of his career in great detail. The later periods (often as much as the past 25 or 30 years), however, were often skipped over in a few words, with few anecdotes, and with emphasis only upon a few particularly significant transition periods. In several cases, an executive had difficulty remembering the exact year a given promotion was received, what his title was at that time, etc.

In general, most of the careers have developed steadily over a rather long period of time, but with successes and promotions occurring regularly. Most of the executives reported being fully employed during the depression and one would suspect that this provided, not only a head-start once the depression was over, but also valuable continuity of reinforcement. At any rate, this group seemed to be among the last to be laid off during this period or during others.

It appears that the leadership abilities of these individuals were typically recognized rather early and utilized rather consistently, as evidenced by their military experiences, their early and continuing associations with significant technological, economic, and social events, etc. Several individuals who had been trained in technical areas and who had acquired success in these areas indicated that they then moved into management because they felt that they were "more people-oriented".

The sample as a whole impressed the interviewers as a group of particularly bright, well-prepared, and highly motivated individuals with rather broad interests and knowledge which belie the stereotypes either of the "narrow" or of the "conservative" businessman.

Neither were popular stereotypes of the "governmental bureaucrat" supported.

#### B. Pre-Retirement vs. Post-Retirement Samples

How comparable are the pre- and post-retiree samples? Are they matched sufficiently on variables which are not of interest but which might have behavioral effects? Can their use in the investigation of retirement effects be justified? Perhaps the fact that we are now presently in a state of transition and undergoing high rates of change make it unlikely that we will find pre- and post-retirement samples that do not differ in a great many unwanted ways, even within such a relatively narrow age range.

Several differences do show themselves in the background and demographic data.

1. Table 8. A larger proportion of pre-retirees came originally from the Middle West.\*
2. Table 14. A larger proportion of the pre-retirees' parents had a college background.\*
3. Table 20. There appears to have been a decrease in the homogeneity of the family on religious matters from the post- to pre-retirees. Pre-retirees report less often having been in close agreement with their parents on religion.\*
4. Table 28. There is a shift in the reported typical response to anger in youth. Pre-retirees reported more often "talking it over with someone".\*

In addition, several differences are shown with regard to present circumstances.

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\* $p \leq .05$

1. Table 33. It should come as no surprise that the pre- and post-retiree groups differ in mean age,\* however, that the sample variances also differ\*\* is indication of the extent to which the pre- and post-retiree samples are not comparable.
2. Table 41. Pre-retirees express more active concern about adequate money for their retirement.\*\*\*
3. Table 44. Pre-retirees more often reported having more than one dependent.

Tables 53 through 57 deal with the executive and retirement itself. The respondents were asked to what extent psychological preparation had been made for retirement, to what extent they had thought about and planned for it. Table 53 shows their responses. There is a tendency for pre-retirees to report that they ARE thinking about it more often than for post-retirees to report that they DID think about it.

Table 53. Psychological Preparation for Retirement

	Currently Thinking About It		Thought About It	
	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
Pre-retirees	.65	.35	---	---
Post-retirees	---	---	.45	.55

Table 54 shows the executives' responses to a question about their attitudes toward retirement.

\* $p \leq .01$   
\*\* $p \leq .02$

\*\*\* $p \leq .05$

Table 54. Attitude Toward Retirement

	<u>Negative</u>	<u>Indifferent</u>	<u>Positive</u>
Pre-retirees	.15	.35	.50
Post-retirees	.10	.30	.60
Total	.13	.33	.55

Pre-retirees were asked about their relationship to their jobs as they neared retirement. Had they accomplished all that they wanted to accomplish in their work? Were there objectives still remaining? Most of the pre-retirees said that they were satisfied that no significant objectives still remained (Table 55). However, when both pre- and post-retirees were asked whether or not the mandatory retirement age was a good idea, response was mixed. Several suggested that the executive should be allowed to reach his "peak" of responsibility slightly earlier and then have a "phasing-out" period afterward that might not be so strenuous.

Table 55. Remaining Objectives in Career

	<u>Yes</u>	<u>No</u>
Pre-retirees	.20	.80

Seventy-three percent of the total sample suggested that their families were a significant factor influencing their post-retirement plans and activities. No clear difference between the pre- and post-retiree samples shows itself (Table 56).

Table 56. Family Focus in Anticipation of Retirement

	<u>Yes</u>	<u>No</u>
Pre-retirees	.65	.35
Post-retirees	.80	.20
Total	.73	.27

There was perfect agreement between the pre- and post-retiree samples on the matter of planning for and engaging in post-

retirement business or community activities making use of the executive's background (Table 57). Some executives said that they planned to maintain a consulting relationship with their companies and some post-retirees reported doing so, however, there was no agreement regarding the value of such relationships.

Table 57. Post-Retirement Involvements

	<u>Planned</u>		<u>Current</u>	
	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
Pre-retirees	.70	.30	---	---
Post-retirees	---	---	.70	.30

A substantial portion of pre-retirees said that they planned to retire early, but an even larger proportion of post-retirees reported that they had served until the conventional retirement age (Table 58).\*

Table 58. Early Retirement

	<u>Planned</u>		<u>Carried Out</u>	
	<u>Yes</u>	<u>No</u>	<u>Yes</u>	<u>No</u>
Pre-retirees	.60	.40	---	---
Post-retirees	---	---	.25	.75

### C. Inter-organizational Comparisons

The organizations are compared with regard to the age of executives, their completed formal education, and their tenure in the organization and in upper-echelon positions. Differences are found in education\* and in the proportion of time spent in upper-echelon positions.\*\* Tables 59, 60, and 61, respectively, deal with these findings.

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\* $p \leq .05$

\*\* $p \leq .025$

Table 59. Age of Executives, By Organization

<u>Organization</u>	<u>Mean</u>	<u>Standard Deviation</u>
I	63.13	2.71
II	63.50	3.08
III	67.00	6.16
IV	61.75	3.19
V	66.25	6.80

Table 60. Mean Years of Education Completed, By Organization\*

<u>Organization</u>	<u>Mean</u>
IA (pre-)	19.00
IB (post-)	13.00
Total	16.00
IIA	15.25
IIB	15.50
Total	15.38
IIIA	16.00
IIIB	17.50
Total	16.75
IVA	17.00
IVB	17.00
Total	17.00
VA	11.50
VB	13.50
Total	12.50

\*Differences among organizational means:  $p \leq .025$ 

Table 61. Length of Service in Organization, By Organization

<u>Organization</u>	<u>Mean Yrs. in Organization</u>	<u>Mean Proportion in Higher Echelon**</u>	<u>S.D.</u>
IA	30.0	.61	.42
IB	28.0	.55	.42
Total	29.0	.58	.42
IIA	31.6	.66	.47
IIB	39.0	.50	.48
Total	35.3	.58	.47
IIIA	33.0	.29	.44
IIIB	32.0	.47	.42
Total	32.5	.38	.43
IVA	24.0	.71	.32
IVB	20.0	.80	.39
Total	22.0	.75	.35
VA	36.0	***	***
VB	39.0		
Total	37.5		

\*\*Differences among organizational means:  $p \leq .05$ 

\*\*\*Not available

## II. Personality (CPI, Rokeach Dogmatism Scale)

### A. Description of the Executive Sample

Obtained means and standard deviations for the California Psychological Inventory are shown in Table 62. Comparable data from additional samples are included for comparison purposes.

Table 62. Means and Standard Deviations For CPI Scales Compared With Some Additional Samples

Scale	Pre- Plus		College		Business		Salesmen*		Bank	
	Post-		Students*		Executives*				Managers*	
	m	sd	m	sd	m	sd	m	sd	m	sd
Do	31.3	5.8	28.3	6.3	29.5	6.7	32.0	4.7	30.2	4.3
Cs	20.6	3.2	20.9	3.8	20.5	4.3	21.1	3.3	21.3	3.2
Sy	25.5	4.9	25.4	5.0	25.4	5.5	28.0	3.8	25.4	4.3
Sp	35.1	5.6	37.3	5.8	36.1	5.4	38.2	4.5	36.4	5.2
Sa	20.9	3.6	22.3	3.8	20.7	4.4	23.2	2.4	19.6	3.3
Wb	39.7	3.9	36.6	4.6	39.8	3.4	39.8	3.0	40.5	2.7
Re	33.3	4.0	30.8	4.5	31.5	5.7	31.6	4.4	33.2	3.6
So	38.2	5.0	36.8	5.2	37.5	5.1	38.3	4.4	39.0	5.1
Sc	33.7	7.0	27.6	7.5	32.9	7.1	32.0	6.2	34.8	6.9
To	24.5	3.8	23.3	4.8	24.5	5.1	24.1	4.1	25.2	4.0
Gi	21.4	6.0	17.2	6.2	20.0	6.8	20.7	5.6	21.2	7.2
Cm	26.4	1.9	25.5	2.0	26.3	1.4	27.1	1.1	26.5	1.3
Ac	29.8	3.9	27.4	4.5	28.7	5.2	30.1	4.0	30.6	4.0
Al	20.0	4.1	20.9	4.2	19.7	4.8	17.9	3.6	22.1	3.3
Ie	39.6	4.9	39.8	5.0	40.1	6.3	40.3	4.3	41.2	4.2
Py	12.8	2.0	11.4	3.0	12.2	3.1	12.1	2.4	12.1	2.5
Fx	8.1	3.7	11.1	3.8	9.3	3.6	6.9	3.1	8.7	3.6
Fe	17.2	3.2	16.7	3.7	16.2	3.5	16.3	3.1	16.4	3.4

\*Source: California Psychological Inventory. Manual. Palo Alto, California: Consulting Psychologists Press, Inc., 1957, 34.

Response to items on the Rokeach Dogmatism Scale are shown in Table 63.

Table 63. Means and Standard Deviations for Dogmatism Scale

	Mean	Standard Deviation
Pre-retirees	134.55	27.74
Post-retirees	141.10	28.32
Total	137.83	28.03



### B. Pre-Retirement vs. Post-Retirement Samples

Only one significant difference was found between pre- and post-retirement samples on the California Psychological Inventory. The difference is between the variances on the Wb (Sense of Well-Being) scale,\* indicating that post-retirees are more variable in their responses than pre-retirees (Table 64). There is also a somewhat consistent tendency for pre-retirees to score above post-retirees on the scales in Class I (See page 41).

Table 64. Pre- and Post-Retiree Means and Standard Deviations for CPI Scales

<u>Scale</u>	<u>Pre-retiree</u>		<u>Post-retiree</u>	
	<u>m</u>	<u>sd</u>	<u>m</u>	<u>sd</u>
Do	32.0	5.7	30.6	6.0
Cs	20.9	3.2	20.3	3.2
Sy	25.3	5.2	25.7	4.6
Sp	34.5	6.3	34.0	4.8
Sa	21.1	3.9	20.7	3.3
Wb*	40.3	2.3	39.1	5.4
Re	33.2	4.1	33.3	3.8
So	38.2	6.2	38.3	3.8
Sc	33.4	6.2	34.1	7.7
To	24.6	3.5	24.3	4.2
Gi	21.2	5.5	21.5	6.5
Cm	26.6	1.9	26.2	1.9
Ac	29.6	3.6	29.9	4.1
AI	20.3	3.9	19.7	4.3
Ie	39.6	5.3	39.7	4.4
Py	12.5	2.2	13.1	1.8
Fx	8.0	3.7	8.2	3.6
Fe	17.7	3.1	16.8	3.3

\* $p \leq .02$

No significant differences were found between the pre- and post-retiree samples on the Rokeach Dogmatism Scale (Table 63).

### C. Inter-organizational Comparisons

Mean scale values are shown, by organization, for the California Psychological Inventory in Table 65. No significant

differences resulted.

Table 65. Means For CPI Scales, By Organization

Scale	Organization				
	I	II	III	IV	V
Do	33.5	32.8	30.1	32.8	27.1
Cs	22.3	21.3	18.5	21.5	19.4
Sy	27.6	26.6	23.8	26.5	22.9
Sp	34.6	35.5	30.0	37.4	33.8
Sa	21.6	22.5	18.4	22.4	19.5
Wb	41.3	40.0	39.3	39.6	38.1
Re	34.1	34.9	33.9	31.9	31.5
So	37.3	40.1	39.1	38.1	36.4
Sc	34.5	36.8	35.3	29.1	32.9
To	24.3	26.0	23.5	25.3	23.3
Gi	21.9	24.1	23.0	17.5	20.3
Cm	27.1	26.5	26.3	25.8	26.3
Ac	32.9	30.5	31.1	28.0	26.3
AI	19.5	21.4	19.1	19.5	20.3
Ie	42.0	40.4	39.8	38.0	37.9
Py	13.0	12.6	13.0	12.6	12.5
Fx	6.8	8.0	7.4	9.5	8.8
Fe	18.0	17.6	17.3	15.9	17.4

Means for the Rokeach Dogmatism Scale are shown, by organization, in Table 66. No significant differences resulted, but there appears to be a tendency toward lower dogmatism in Organization II.

Table 66. Means for Dogmatism Scale, By Organization

Organization	Mean
IA	138.5
IB	135.0
Total	136.8
IIA	116.0
IIB	115.3
Total	115.6
IIIA	151.5
IIIB	140.5
Total	146.0
IVA	134.5
IVB	163.0
Total	148.8
VA	132.3
VB	151.8
Total	142.0

### III. Values (Allport-Vernon-Lindzey: Study of Values, Rokeach Value Scale)

#### A. Description of the Executive Sample

Table 67 shows means and standard deviations for Allport-Vernon-Lindzey value scales compared with comparable data from additional samples. In general, the executive sample tends to be higher on the economic value, lower on the aesthetic, and higher on the religious in relation to the general norms.

Table 67. Means and Standard Deviations For Allport-Vernon-Lindzey Value Scales Compared With Some Additional Samples

<u>Scale</u>	<u>Pre- Plus</u>		<u>Male Norms*</u>		<u>Southern</u>		<u>Bus. Ad.</u>	
	<u>Post-</u>				<u>Businessmen*</u>		<u>Students*</u>	
	<u>m</u>	<u>sd</u>	<u>m</u>	<u>sd</u>	<u>m</u>	<u>sd</u>	<u>m</u>	<u>sd</u>
Theo.	43.02	5.9	43.09	**	37.04	**	41.09	6.4
Econ.	48.10	6.9	42.05	**	45.69	**	49.25	7.7
Aesth.	31.27	5.5	36.72	**	34.35	**	32.58	7.3
Soc.	35.68	5.8	37.05	**	36.24	**	36.16	6.0
Pol.	40.38	6.2	43.22	**	40.39	**	45.68	6.0
Rel.	41.53	9.5	37.88	**	46.29	**	35.24	8.4

\*Source: Allport-Vernon-Lindzey, Manual. Study of Values. Boston: Houghton Mifflin Company, 1960., 14.

\*\*These data were not available.

Mean ranks for Rokeach's instrumental and terminal values are shown in Tables 68 and 69, respectively. Instrumental values ranked highest by the entire sample were "honest", "responsible", "capable", and "ambitious". Lowest ranked were "obedient", "cheerful", "polite", and "clean". Terminal values ranked highest were "family security", "self-respect", "sense of accomplishment", and "freedom". Lowest ranked were "social recognition", "pleasure", "world of beauty", and "equality".

Table 68. Mean Ranks of Rokeach Instrumental Values

<u>Value</u>	<u>Pre-retiree</u>	<u>Post-retiree</u>	<u>Total</u>
Honest	2.30	3.70	3.00
Responsible	5.05	6.20	5.63
Capable	5.20	6.05	5.63
Ambitious	7.65	6.35	7.00
Broadminded	7.90	7.05	7.48
Courageous	8.25	7.70	7.98
Forgiving	9.45	8.80	9.13
Self-Controlled	10.05	9.15	9.63
Intellectual	9.85	9.85	9.85
Helpful	10.40	10.15	10.28
Logical	10.05	11.50	10.78
Imaginative	12.50	10.05	11.28
Independent	10.35	12.20	11.28
Loving	10.30	12.65	11.48
Clean	12.30	11.60	11.95
Polite	12.75	11.65	12.20
Cheerful	12.25	12.20	12.23
Obedient	14.35	14.10	14.23

Table 69. Mean Ranks of Rokeach Terminal Values

<u>Value</u>	<u>Pre-retiree</u>	<u>Post-retiree</u>	<u>Total</u>
Family Security	3.35	5.40	4.38
Self-Respect	6.20	6.00	6.10
Sense of Accomplishment	6.25	6.50	6.38
Freedom	7.00	6.95	6.98
Wisdom	7.90	7.00	7.45
Inner Harmony	7.55	8.70	8.13
Happiness	8.55	8.10	8.33
World at Peace	9.65	7.80	8.73
True Friendship	9.00	10.45	9.73
Mature Love	10.00	10.10	10.05
National Security	11.05	9.90	10.48
A Comfortable Life	10.45	10.60	10.53
Salvation	9.55	11.80	10.68
An Exciting Life	12.60	9.35	11.60
Equality	12.20	9.35	11.60
World of Beauty	13.60	12.35	12.98
Pleasure	13.25	14.25	13.75
Social Recognition	12.85	14.75	13.80

#### B. Pre-Retirement vs. Post-Retirement Samples

No reliable differences were found between the pre- and post-retiree samples on the Allport-Vernon-Lindzey scales. Of interest, however, is the suggestion of a real difference between the pre-



and post-retiree variances on the economic value (Table 70).\*

Pre-retirees may tend to be slightly more variable.

Table 70. Means and Standard Deviations For Allport-Vernon-Lindzey:  
Study of Values

Scale	Pre-retirees		Post-retirees	
	m	sd	m	sd
Theoretical	41.90	6.24	44.50	5.50
Economic*	48.40	8.06	47.85	5.63
Aesthetic	31.05	5.34	31.50	5.74
Social	34.70	5.57	36.65	5.98
Political	39.95	6.65	40.80	5.73
Religious	44.00	10.18	39.05	8.75

No dramatic shifts either in instrumental or terminal values are reflected in the Rokeach scale. Several differences of at least two full mean ranks did appear, however, and these might be suggestive. Among instrumental values, post-retirees ranked both "loving" and "independent" lower and "imaginative" higher. They also ranked terminal values "family security" and "an exciting life" higher than did pre-retirees (Tables 68 and 69).

#### C. Inter-organizational Comparisons

No significant inter-organizational differences were found with the Allport-Vernon-Lindzey instrument (Table 71). The only thing of interest is a suggestion that the civil service organization might be somewhat higher on the theoretical value and the retailing organization a bit higher on the economic. Assuming that these are reliable differences, the one in Organization III is most likely a reflection of the prominent amount of professional training of the executives in it, not of the nature of civil service organizations in general as opposed to commercial organizations.

\*F=2.05

Table 71. Means For Allport-Vernon-Lindzey Scales,  
By Organization

Organization	Theo*	Econ.	Aesth.	Soc.	Pol.	Rel.
IA	41.25	44.25	36.25	35.25	39.25	43.75
IB	44.75	49.50	29.75	34.00	40.00	42.00
Total	43.00	46.88	33.00	34.36	39.36	42.88
IIA	37.25	55.50	30.50	30.00	42.75	44.00
IIB	42.00	50.00	34.00	36.50	40.75	36.75
Total	39.63	52.75	32.25	33.25	41.75	40.38
IIIA	47.50	46.25	29.50	33.75	34.50	48.50
IIIB	49.25	46.75	28.75	37.00	40.00	38.25
Total	48.38	46.50	29.13	35.38	37.25	43.37
IVA	42.00	49.25	27.50	38.00	44.00	39.25
IVB	42.75	44.50	35.50	36.50	37.25	43.50
Total	42.38	46.88	31.50	37.25	40.63	41.38
VA	41.50	46.75	31.50	36.50	39.25	44.50
VB	42.00	48.50	29.50	39.25	46.00	34.75
Total	41.75	47.63	30.50	37.88	42.63	39.63

\*Differences among organizational means:  $p \leq .05$

Tables 72 and 73 present the mean ranks, by organization, of Rokeach's instrumental and terminal values, respectively. It appears that the five organizations are quite homogeneous in their rankings. No one organization seems to stand out as a deviant and no consistent patterns seem to be present.

Table 72. Mean Ranks of Rokeach Instrumental Values,  
By Organization

Value	Organization				
	I	II	III	IV	V
Honest	2.75	2.50	3.00	1.75	5.00
Responsible	5.38	5.63	6.13	5.25	5.75
Capable	5.25	3.50	8.50	6.13	4.75
Ambitious	8.38	6.25	8.38	7.13	4.88
Broadminded	7.50	5.88	8.13	8.13	7.75
Courageous	8.38	7.88	5.88	7.63	10.13
Forgiving	10.50	9.88	7.38	9.00	8.88
Self-					
Controlled	8.75	11.00	9.00	11.75	7.63
Intel-					
lectual	8.00	8.25	9.88	12.00	11.13
Helpful	10.13	8.00	10.63	9.63	13.00
Logical	12.63	10.38	10.63	8.75	11.50
Imagi-					
native	13.75	10.50	14.13	8.63	9.38
Independ-					
ent	10.00	14.88	9.88	10.75	10.88
Loving	10.50	11.50	11.63	10.63	13.13
Clean	11.50	12.13	13.63	10.63	11.88
Polite	12.63	13.75	9.25	13.13	12.25
Cheerful	9.50	13.50	13.13	13.63	11.38
Obedient	14.25	15.63	13.13	16.38	11.75

#### IV. Life-Satisfaction

##### A. Description of the Executive Sample

Table 74 shows the means and standard deviations for the Life-Satisfaction Index, Part I, Part II, and both parts combined. In addition, comparable data are shown from a study carried out by Neugarten, et al. (1961) in which the Life-Satisfaction Index was administered to a sample of 92 males and females, aged 50 to 89, and stratified by socioeconomic status. In all cases, means for the executive sample are substantially higher and standard deviations smaller, indicating that the executive sample as a whole displays a relatively high degree of life-satisfaction, as measured by this instrument.

Table 73. Mean Ranks of Rokeach Terminal Values  
By Organization

Value	Organization				
	I	II	III	IV	V
Family					
Security	5.00	3.38	2.63	4.88	6.00
Self-					
Respect	5.63	5.50	5.50	6.50	7.38
Sense of					
Accomplish-					
ment	7.25	5.63	5.88	4.38	8.75
Freedom	6.63	7.63	6.88	8.25	5.50
Wisdom	8.25	6.50	7.75	6.13	8.63
Inner					
Harmony	6.25	7.63	9.00	9.75	8.00
Happiness	7.63	8.75	8.13	7.88	9.25
World at					
Peace	10.00	9.88	7.50	9.38	6.88
True					
Friend-					
ship	11.88	6.25	11.88	12.50	8.88
Mature					
Love	9.63	8.13	11.25	11.75	9.50
National					
Security	9.25	10.25	9.25	13.25	10.38
A Comfort-					
able Life	10.38	12.38	10.63	11.00	8.25
Salvation	8.88	13.25	8.75	12.13	10.38
An Excit-					
ing Life	10.63	11.63	12.88	7.25	12.50
Equality	12.88	11.63	11.88	10.75	10.88
World of					
Beauty	13.50	13.88	14.25	10.88	12.38
Pleasure	12.50	15.63	13.13	14.00	13.50
Social					
Recog-					
nition	14.88	13.13	13.88	13.13	14.00

Table 74. Means and Standard Deviations For Life-Satisfaction Index

	Part I		Part II		Part I + Part II	
	m	sd	m	sd*	m	sd
Pre-	16.10	1.95	18.35	1.56	34.45	2.36
Post-	15.35	2.13	18.45	2.85	35.80	4.40
Total	15.73	2.04	18.40	2.21	35.13	3.38
Neugar-	12.40	4.40	15.10	4.70	27.60	6.70
ten, et al**						

\*Difference between pre- and post- variances:  $p \leq .02$ \*\*Source: Neugarten, G. L., Havighurst, R. J., and Tobin, S. S. The Measurement of Life-Satisfaction. Journal of Gerontology, 1961, 16, 134-143.

It is interesting to note that the dogmatism measure and life-satisfaction appear to be related, at least as measured by the Life-Satisfaction Index, Part II ( $r = -.37$ ). Dogmatism and the total life-satisfaction score correlated  $-.28$ , which approaches significance. No comparable relation was found between dogmatism and Part I of the Index, however.

#### B. Pre-Retirement vs. Post-Retirement Samples

No difference was found between pre- and post-retiree means on the Life-Satisfaction Index (Table 74), but variances for both Part II and for the total scores (Part I + Part II) were significantly different\*, indicating that a greater degree of variability exists in the post-retiree sample.

#### C. Inter-organizational Comparisons

Table 75 shows means for the Life-Satisfaction Index, by organization. No significant inter-organizational differences appear.

Table 75. Means For Life-Satisfaction Index,  
By Organization

<u>Organization</u>	<u>Part I</u>	<u>Part II</u>	<u>Part I + Part II</u>
IA	15.75	17.00	32.75
IB	15.25	18.25	33.50
Total	15.50	17.63	33.13
IIA	17.75	18.75	36.50
IIB	15.50	20.00	35.50
Total	16.63	19.38	36.00
IIIA	16.25	19.25	35.50
IIIB	14.50	17.00	31.50
Total	15.38	18.13	33.50
IVA	15.50	17.50	33.00
IVB	16.50	17.00	33.50
Total	16.00	17.25	33.25
VA	15.25	19.25	34.50
VB	15.00	20.00	35.00
Total	15.13	19.63	34.75

\* $p < .02$

## CHAPTER FIVE: DISCUSSION

### The Sample

How good is the sample? Is it appropriate and adequate for our purposes?

First, there is the possibility that the sampling procedure itself had the effect of artificially homogenizing the post-retiree group. Since it is likely that the post-retirees would feel less obligation to participate in the study simply because a member of their former organization approached them, it is possible that only those who are relatively well-adjusted to retirement, i.e., those upon whom retirement has had no significant effect, would volunteer to cooperate in the first place. If this were the case, it would have the effect of removing the most interesting cases from the sample, resulting in pre- and post-retiree groups which are more alike in critical respects and obscuring differences which might actually exist in the population. At this point, such a possibility contributes to the ambiguity of negative results. While this study has made no provision for determining what differences, if any, might exist between those who volunteered and those who did not, further studies should take such possible differences into account.

The inadequacy pointed out above can contribute to the extent to which the sample is not representative of retiring executives in the organizations included here as well as of retiring executives in general. Consequently, generalizations from this study, including those from the descriptions offered, must be tentative and cautious. But this should be

the case in any event. There is some reason to believe, however, that the sample does correspond somewhat to the executive population as a whole. Data shown in Tables 62 and 67 agree somewhat more closely with related samples shown than with college student norms in the one case and the general male norms in the other. While these comparisons offer nothing dramatic, they do suggest that our sample of executives is not an entirely improbable and deviant one.

An additional problem concerns the extent to which pre- and post-retiree samples are comparable in ways other than those relevant to the study. Apparently, there are differences, some of which are reviewed on pages 61 and 62. The difference between pre- and post- age variances is unfortunate and, in principle at least, it is avoidable. Practical sampling problems in this particular instance, however, made such an outcome rather unavoidable. Other differences appear simply to be reflections of changing social and cultural conditions which apparently can show themselves even within the relatively short period of time represented in the difference between pre- and post-retiree ages. In general, the differences that do appear do not seem to be particularly relevant ones, assuming that they are real, and there is always the likelihood of getting some by chance in a study such as this in which so many comparisons are made. They do point out, however, that it is really impossible to control such sources of contamination in a study such as this. This is one of the major defects inherent in cross-cultural inquiries and it can be eliminated only by substantial modification in research design.

Is the executive population really a useful one for use in the study of the general problems of leisure? This sample would seem to indicate

that it is: 1) Executives as a group do seem to be rather satisfied with their stake in life (Table 74) and this corresponds to earlier findings regarding the executive and job-satisfaction. It still remains, however, to determine the extent the degree of life-satisfaction represented here is determined by the relation of the executive to his job. 2) As expected, the sample is well-educated. The entire group averaged 15.53 years of formal education and those without extensive formal backgrounds appear to have reached rather comparable levels of general education informally. In any event, the entire sample is of course highly skilled and knowledgeable within its particular areas of competency. 3) The executives, in general, appear to be enjoying good health and the effects of aging appear to be unusually mild in many cases. 4) Finally, while it appears that the sample is in uncommonly good financial condition, in relation to the remainder of the population, it is not universally affluent (Tables 41 and 42).

#### Description of the Executive Sample

While the data provide an interesting and suggestive portrait of this particular generation of executives, one must be careful not to carry conclusions and inferences too far. First, the sort of data available here can provide only correlational inferences and, at best, is not capable of an identification of variables which "cause" people to become successful executives. Secondly, there are no baseline data from the general population or from other groups within the population with which these data can be compared. While a given characteristic might be possessed by executives, it might be possessed by other people as well, and to the same extent. Without baseline data, one cannot

identify those personal and background characteristics which distinguish the executive group from others in the culture at large.

Finally, a good deal of the data presented here is derived from self-reports. For comparisons with other samples, self-report data can be used like any other; a verbal response is no less behavioral. Without validating criteria of some kind, however, self-reports alone can be extremely misleading and are subject to a number of unwanted influences, such as perceived role requirements, interviewer expectations, selective retention processes, etc. Anyone who has seen the same person respond in opposite ways to the same item contained twice at different points within the same psychometric instrument can appreciate these inadequacies.

Nevertheless, there is great value in the longer-range study of the executive population, just as there is value in studying any person who is exceptional, either in a constructive or a destructive way. The American executive is numerically exceptional, at least, and given the competitive conditions of contemporary organizations in the United States, those who somehow manage to find themselves in top-level leadership positions may well be psychologically exceptional as well. There is no doubt that the nature of this exceptionality is as yet by no means clear (For example, most of the sample were near the tops of their school classes, but some academic "disasters" were included as well.), but in a culture that emphasizes competition and achievement as well as material wealth, it is good to continue toward an understanding of those individuals who have won the game in all of these areas. Is the major executive different in kind, psychologically, or is he the embodiment of mainstream cultural values, i.e., just like everyone else, only more so? At any

rate, the general interest of the behavioral scientist in this population has a basis in common with his interest in the unusual man of any description. One might suspect that one's knowledge of the behavior of the modal man will remain forever clouded so long as one studies only the modal man. It is fair to assume that an understanding of what psychological processes are capable of producing under extraordinary circumstances might lead to a fuller understanding of the processes themselves and of their typical products.

It's interesting and even important to notice that some of the background data in this study support findings which have been typical in areas directly concerned with current socioeconomic problems, such as education. We're usually told that one's chances of getting along well in life are considerably diminished if 1) a parent is missing from the home during childhood and/or 2) if the family income level is below some critical minimum. Apparently, the absence of a parent deprives the child of some socioemotional support necessary for adequate development and makes coping with life somehow more difficult, in the absence of powerful compensating influences. In addition, it appears that family income must be sufficient to provide a foundation upon which a stable and healthy family structure can be built and sustained. With either one or both of these disadvantages, the child's likelihood of success is seriously diminished, whatever his desires, whatever his intentions, whatever his opportunities. Further, the socioeconomic classes in the United States have sub-cultural life styles which distinguish them and the journey from one to another can be a long journey indeed. While the nation's system certainly does not have built-in prohibitions preventing vertical mobility,

hurdles can be too high, so high that nearly no one makes it over the top, ever.

So, what about the self-made man? Is there such a species? One of the executives in the sample said, knowingly, "You can only go so far on your own. After that, you've got to have the help of other people or you'll get nowhere." Table 15 indicates that seventy-five percent of the total sample came from families in which both parents were present. Table 13 shows that, while nearly half of the sample (41%) came from homes in which the father's principal occupation was that of semi-skilled or skilled worker (not nearly so exceptional during the earlier part of the century as in the contemporary economy), only FIVE percent had fathers who were unskilled workers. The point seems to be that certain variables are critical during childhood for making one's later success in life reasonably probable, even for the exceptional man. Not coming from a solidly upper-middle class home was not and presumably still is not a serious handicap in the United States (and that's no real surprise), but coming from too near the bottom, even at a time when laborers made up a much larger proportion of the labor force than they do now, can be. A devastating one. There is no magic.

An interesting difference is found in Tables 26 and 27 and was discussed above. Apparently, executives, during childhood were substantially more inclined to meet their friends at friends' homes, but much more at their own homes during adulthood. What this means is difficult to say, but the difference is rather dramatic. One might speculate that the executive, who places relative emphasis on the economic value (Table 67), also places a high value on symbols of economic status, including those found in the home. Since a relatively large proportion of the sample

reported coming from working-class homes, it may have been the case that inferiority feelings related to the home led to a tendency to avoid bringing friends into it. Now, however, after success and its symbols have been achieved, there may be a desire to display the fruits of success.

It's interesting that executives in general ranked "honest" highest on Rokeach's instrumental scale. Why honesty should take such conspicuous precedence over other values in the list, including more predictable ones such as "responsible", "capable", and "ambitious", is difficult to say. It is true, however, that the sample also scored relatively higher on the "religious" value on the Allport-Vernon-Lindzey instrument (Table 67). One could interpret the ranking of "honest" as an expression of the group values of Protestant organizations with which the sample is heavily associated (Table 22). On the other hand, it may reflect experience regarding the utility of honesty in business or life activity or it may be, at least in part, a reaction to the conventional stereotyped businessman image that seems to prevail, or might be perceived to prevail, in the culture.

It's also interesting that "obedient" was ranked lowest on the instrumental scale. This fact, along with the observation that "social recognition" is ranked lowest on the terminal scale, as well as the observation that only twenty-two percent of the sample reported engaging predominately in organizational activities (4-H, Boy Scouts, student newspapers, etc.) during childhood, suggests that the executive sees himself as a non-conformist and, to a large extent, he may be. This would not necessarily conflict with the observations made above in relation to the executive and his friends. His non-conformity might be rather specific to his organizational role, or at least it would not have to be a general

trait expressing itself in all situations. If the highly successful executive is something of a maverick, it really should come as no surprise. We should not be surprised if he turns out to be different from other people. And since there are very few top-level executives in large organizations, it shouldn't be surprising that he is different from most of the people there either. It may be that the innovative or rebellious man (innovative or rebellious in the right ways) is gradually sifted through to the reigns because of, not in spite of, these characteristics. In fact, it may be that such a man is less suited for service at lower levels than he is at higher levels in the organization. And it may be that when we think of the Boy Scouts, 4-H, etc., as "building leaders", we are really thinking about building a sizeable collection of better followers.

#### Pre-Retirement vs. Post-Retirement Samples

This study provides no compelling evidence that the pre- and post-retirement samples belong to fundamentally different psychological populations. At least, the differences found here are something less than thrilling, particularly to one who might have assumed that the post-retirement executive is among those who need help. This is not to say that nothing of interest has emerged from the data; however, it may mean that the study of retirement in the executive population should not be placed on the top of the priority list for behavioral research. The whole problem may reduce to this: If the future man of leisure is a great deal like the typical executive in this sample, he should do quite well. To the extent that he is not, he may or may not have difficulties. We are not in a good position for investigating such similarities and differences.

In behavioral research, differences which do not reach significance are ambiguous from the interpreter's point of view. They may occur because no real differences exist among parameters or they may occur because of inappropriate or insensitive measuring instruments. It is also true that one is less likely to detect real differences with small samples than with large ones and, if a sample is very small, one may be engaged in a futile exercise, with significant differences only remotely probable whatever the circumstances in the real world. Two points can be made regarding the relation of these realities to this study. First, it is apparent that the samples were not so small as to prevent significant differences from occurring. The difference between pre- and post-retiree mean age, a difference one can be confident really exists in the population, was significant at the .01 level (Table 33). If differences of comparable magnitude exist among psychological parameters, one should be no less likely to detect them.

Secondly, a rather wide variety of measurements were collected in this study. If fundamental and important differences exist, one would expect them to show themselves on at least some of these measures. Predominately negative results, while ambiguous, might still provide at least intuitive reason to believe that massive effects do not occur. Large amounts of uranium might still exist under our feet, even after several dozen moderately sensitive geiger counters have not detected it, but the most reasonable decision might still be to spend additional time searching in a different area.

Hindsight might suggest that personality measures would not be particularly valuable in a study such as this. One shouldn't expect very much or very rapid change in an individual's personality after he has

spent sixty years or so developing the one he has. In addition, one shouldn't expect much change in the executive's personality at retirement. First, the executive apparently has substantial resources to draw upon for dealing with changed circumstances. Secondly, it may be that retirement does not provide a meaningful challenge to his resources. For example, the route from a remotely located and poor farm family with ten children to one of the most responsible positions in one of our most significant organizations is not a route without its hazards and challenges along the way. Retirement might offer threats which are tame by comparison. In short, one shouldn't expect personality differences as a function of pre- vs. post-retirement status and, for the most part, none were found. But as indicated in an earlier chapter, one would expect such differences only if the effects of retirement were really quite gross. Negative findings suggest that they are not.

As indicated earlier, common observation as well as earlier publications have suggested that executives vary substantially in their responses to the retirement situation. In general, the data in this study support these observations. Post-retiree responses were found to be more variable than pre-retiree responses on the Havighurst Life-Satisfaction Index, Part II (Table 74). This finding is supported by a comparable result on the Wb scale of the California Psychological Inventory (Table 64), a scale which appears to measure much the same characteristic, but in a more indirect manner. That differences in variances were found on the Life-Satisfaction Index and not differences in means suggests that retirement does have an effect, but that this effect is not simple; it is mediated by some other variable or variables. A fundamental problem for any further research in this area would be to identify these mediators.

However, these data have simply provided systematic support for earlier unsystematic observation (which in itself is valuable). We still do not know the extent of the life-satisfaction variability in the population or the numbers of individual executives involved.

Some rather interesting findings resulted when pre- and post-retiree groups were compared with regard to the phenomenology of retirement. Pre-retirees were more likely to report that they had thought about retirement before leaving the job than were post-retirees (Table 53). It may be that the retirement experience brings to light aspects of the situation which are not anticipated beforehand and for which the post-retiree later judges that his earlier thought and preparation were not sufficient or relevant.

In general, expressed attitudes toward retirement were rather positive on the part of both pre- and post-retirees (Table 54), but the two groups differed substantially in their relation to early retirement (Table 58). Sixty percent of the pre-retirees indicated that they expected that they might retire early, but only twenty-five percent of the post-retirees reported actually doing so. One could interpret the intentions of the pre-retirees as a reaction to the heavy demands made upon them by their organizational roles. It appears that the effects of such demands are clearly felt. Pre-retirees are less inclined to report that they receive recognition on the job than are post-retirees in relation to their former jobs (Table 51). Table 41 indicates that pre-retirees appear to be more concerned with money after retirement than are post-retirees. The pressures of organizational life may incline the pre-retiree toward getting out early, but uncertainties about conditions after retirement as well as continuing psychological benefits accruing

from the job serve to delay the action itself. An apparent tendency for pre-retiree scores to be somewhat consistently higher on the Class I CPI scales also suggests the effects of role requirements before retirement and a consequent relaxing of related behaviors once the executive is "released" from these demands.

### Inter-organizational Differences

There is some support for the expectation of intra-organizational homogeneity and inter-organizational heterogeneity of values. Table 70 shows pre-retiree score variances to be greater than those for the post-retirees on four of the six Allport-Vernon-Lindzey value scales. Further, one would suspect that the aesthetic value, one of those which does not follow this trend, might be rather irrelevant in this population ("world of beauty" was ranked third from the bottom on the Rokeach scale) and therefore considerably subject to random variation. No comparable support was provided by the Rokeach value scales, however.

The assumption that some inter-organizational differences in executive response might be accounted for by differences in recruitment procedures, company history, company location, etc., is given some support in Tables 60 and 61. Significant differences were found among the five organizations in the amount of formal education completed by executives as well as in the number of years of service in the organization. It appears that one cannot attribute all of any resulting inter-organizational differences to organizational processing alone.

### Methodology

A word can be said about the particular problems of gathering data from an unusually sophisticated and verbal population. In general, one

might suspect that executives are particularly adept at role-playing and that they have probably developed a complicated system of role-related responses for use in dealing with strangers. It is possible that one might never get through these behaviors in an interview session to responses more typical of the individual himself. It does seem, however, that this problem was at least minimized in this study by the peculiar nature of the interview topic. While it's not unusual for the executive to meet and interact with strangers in his office, it is rather unusual for him to review and discuss his life-history in such a situation. One would suspect, then, that previously established role-related behaviors might be less appropriate and less likely to occur. At any rate, it didn't appear that this was a particularly troublesome problem in this instance.

### Further Study

Again, this study can provide only preliminary clues. Additional study must be done if reasonably solid conclusions are to be drawn. This investigation does appear to suggest, however, that retirement is not a problem of major proportions for the executive. Few pre- vs. post-retiree differences did appear and, since so many comparisons were made, one could attribute these to chance. If further study were to be done, however, there are several ways in which it could represent an improvement over this investigation.

- 1) Larger samples should be used in order to provide a greater likelihood of getting significant differences and in order to allow the investigation of interactions, etc. More organizations as well as

more subjects within organizations should be used.

- 2) A different sampling procedure should be used, one without the built-in flaw that existed in the one used here and discussed earlier. Or, at least, some procedure should be devised for assessing the extent to which cooperating executives differ from those who do not cooperate.
- 3) Further insights could be gained by collecting, not only self-report data from the executive, but also the observations of "significant others" in the executive's social environment. In addition, more objective data, such as that from organizational records, could be useful.
- 4) Finally, further study should be longitudinal, not cross-sectional. Longitudinal studies are usually not done in developmental areas because of the great amounts of time that are usually involved. With the relatively short period of ten years or so that would be involved here, however, such a study would be practicable. It would be the only way in which all nuisance variables could be controlled. There would remain only the practical decision of whether or not the investment required would be justified by the probable yields of such a study.

### Summing

The generation represented by the executives in this sample is a tremendously exciting one. Its lives and careers have seen some of history's most inspiring triumphs as well as its most terrifying threats. It

was the ideal generation for its times; its accomplishments have been enormous. But, great as they have been, they simply haven't been enough. Problems of stunning magnitude have been passed to the generations which follow. And while the young have a remarkable record to match, matching it won't be enough either. Contemporary circumstances demand that a great deal more be done if we are even to survive. The younger generations must be even better.

But, then, it may be that the retiring generation accomplished so very much because there were no real alternatives. The times demanded that it be done. Optimism isn't out of fashion yet.

We can expect changes to occur in the next several years that will dwarf the huge ones which have already occurred in this century. Some significant questions are these: To what extent can man adapt? Is he flexible enough to adjust to the demands of a constantly and rapidly modifying environment? What are the limites to his plasticity?

We do not know. But many of the executives in this sample read the news of the successful flight at Kitty Hawk soon after it happened. The same men have also seen July 20, 1969, the end of man's infancy in his life on this planet.

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## LIST OF REFERENCES

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## APPENDIX A

Letter of Introduction to Cooperating Executives

Dear Mr. \_\_\_\_\_

Mr. \_\_\_\_\_ has alerted you regarding your participation in an important research project undertaken by the Division of Organizational Research at Michigan State University. We would like to state briefly the significance of the problem and the relevance of your participation.

The Oliver Wendell Holmes Association of New York has directed our attention to a concern for the effective retirement of executives and to the significant implications which the retirement of these key business leaders has for society. Upper-echelon executives are a significant group with valuable experience and highly developed skills from whom a great deal might be learned to the advantage of members of industrial organizations as well as the communities at large.

At Michigan State University we are primarily interested in identifying those factors which are significant in predicting effective adjustment before, during, and after retirement. We have launched a research study to be conducted with the assistance and cooperation of top-level executives from several Midwestern corporations such as \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, and \_\_\_\_\_ as well as \_\_\_\_\_. Because of your key position in a representative industry, we are sure you see the significance of the study and the need for systematic collection and analysis of data in this area.

The research procedures have proved to be of genuine interest and value to those executives who have already participated in the program. Of course, participation is voluntary and all information will be held in strict confidence. The results of the study will be reported only in terms of averages and other means of summary. As an integral part of the research program, Michigan State University and the Oliver Wendell Holmes Association are considering a seminar later in the year at which time the participants would be invited to meet with leading resource people to discuss the findings and their implications.

We would like to suggest meeting with you on \_\_\_\_\_. The interview will require approximately an hour and a half of your time. We will ask you to complete other materials at your convenience and return them to us. We will call you shortly to determine if this is a convenient time and, if not convenient, to set another time. Mr. Gary Johnson, my Research Associate, and I will appreciate your cooperation in this important project.

Sincerely,

Carl F. Frost  
Professor

## **APPENDIX B**

## APPENDIX B-1

### Interview Questions

1. Did your first full-time job have any unique significance in your industrial career? What were your expectations? How well were they met? How long did you stay?
2. What effect have the following events had on your life and career?
  - a. The Economic Depression(s)
  - b. World War I
  - c. World War II
  - d. Technological Breakthroughs
  - e. The Space Age
3. What do you see as the high point in your career?
4. What significant successes in your industrial career do you see as particularly significant? Failures? How have these affected your career? Your life?
5. What sources of recognition did you have early in your life and career? Late? Inside your organization? Outside your organization?
6. Has your educational training had any unique significance in your industrial career?
7. How has your physical health affected your career? Your retirement?
8. Has your wife had any unique significance in your career?
9. What do you see as the most important event or experience in your career? Why?
10. What do you see as the most significant personal incident or development in your life?
11. Who have been the most significant people in your career? Why?
12. Who have been the most significant people in your life? Why?
13. Do you think that your most satisfying experiences have already occurred or are likely to occur in the future?
14. What essential lessons or experiences have (will have) had meaning or usefulness after retirement?
15. How do you expect that retirement will differ from your present life (re: time available, health, work, leisure, relationship with family, with friends, etc.)? How does retirement differ from your previous life?
16. How much thought have you given (did you give) to retirement?
17. What provisions have you made (did you make) for retirement?

APPENDIX B-2

Career Summary Sheet

Please answer the following background and experience questions by writing in the appropriate information:

Name: \_\_\_\_\_

Date of Birth: Month \_\_\_\_\_ Year \_\_\_\_\_

Place of Birth: City \_\_\_\_\_ State \_\_\_\_\_

Job Title: \_\_\_\_\_

How long have you been employed with the company? Years \_\_\_\_\_

List the different jobs you held since you were eighteen years old:

<u>Job Title</u>	<u>Company</u>	<u>Dates</u>	<u>Reasons for Change</u>
------------------	----------------	--------------	---------------------------

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

In what country was your father born? \_\_\_\_\_

In what country was your mother born? \_\_\_\_\_

What is your religious preference? \_\_\_\_\_

## APPENDIX B-3

### Rokeach Value Scale

#### Terminal Values

Below is a list of 18 values arranged in alphabetical order. We are interested in finding out the relative importance of these values for you.

Study the list carefully. Then, place a 1 next to the value which is most important for YOU; place a 2 next to the value which is second most important to you, etc. The value which is least important, relative to the others, should be ranked 18.

When you have completed ranking all of the values, go back and check over your list. Please take all the time you need to think about this, so that the end result is a true representation of YOUR values.

- \_\_\_A COMFORTABLE LIFE (a prosperous life)
- \_\_\_AN EXCITING LIFE (a stimulating, active life)
- \_\_\_A SENSE OF ACCOMPLISHMENT (lasting contribution)
- \_\_\_A WORLD AT PEACE (free of war and conflict)
- \_\_\_EQUALITY (brotherhood, equal opportunity for all)
- \_\_\_A WORLD OF BEAUTY (beauty of nature and the arts)
- \_\_\_FAMILY SECURITY (taking care of loved ones)
- \_\_\_FREEDOM (independence, free choice)
- \_\_\_HAPPINESS (contentedness)
- \_\_\_INNER HARMONY (freedom from inner conflict)
- \_\_\_MATURE LOVE (sexual and spiritual intimacy)
- \_\_\_NATIONAL SECURITY (protection from attack)
- \_\_\_PLEASURE (an enjoyable, leisurely life)
- \_\_\_SALVATION (saved, eternal life)
- \_\_\_SELF-RESPECT (self-esteem)
- \_\_\_SOCIAL RECOGNITION (respect, admiration)
- \_\_\_TRUE FRIENDSHIP (close companionship)
- \_\_\_WISDOM (a mature understanding of life)

Instrumental Values

Below is a list of another 18 values. Rank these in order of importance in the same way you ranked the first list on the preceding page.

- \_\_\_ AMBITIOUS (hard-working, aspiring)
- \_\_\_ BROADMINDED (open-minded)
- \_\_\_ CAPABLE (competent, effective)
- \_\_\_ CHEERFUL (lighthearted, joyful)
- \_\_\_ CLEAN (neat, tidy)
- \_\_\_ COURAGEOUS (standing up for your beliefs)
- \_\_\_ FORGIVING (willing to pardon others)
- \_\_\_ HELPFUL (working for the welfare of others)
- \_\_\_ HONEST (sincere, truthful)
- \_\_\_ IMAGINATIVE (daring, creative)
- \_\_\_ INDEPENDENT (self-reliant, self-sufficient)
- \_\_\_ INTELLECTUAL (intelligent, reflective)
- \_\_\_ LOGICAL (consistent, rational)
- \_\_\_ LOVING (affectionate, tender)
- \_\_\_ OBEDIENT (dutiful, respectful)
- \_\_\_ POLITE (courteous, well-mannered)
- \_\_\_ RESPONSIBLE (dependable, reliable)
- \_\_\_ SELF-CONTROLLED (restrained, self-disciplined)

APPENDIX B-4

Life-Satisfaction Index

Part I

Below is a list of statements. Please indicate whether you agree or disagree with each one by placing a check on the appropriate line.

Agree      Disagree

- |       |       |  |
|-------|-------|--|
| _____ | _____ | As I grow older, things seem better than I thought they would be.                          |
| _____ | _____ | I have gotten more of the breaks in life than most of the people I know.                   |
| _____ | _____ | This is the dreariest time of my life.   |
| _____ | _____ | My life could be happier than it is now.   |
| _____ | _____ | These are the best years of my life.   |
| _____ | _____ | Most of the things I do are boring or monotonous.  |
| _____ | _____ | I expect some interesting and pleasant things to happen to me in the future.               |
| _____ | _____ | The things I do are as interesting to me as they ever were.                                |
| _____ | _____ | I feel old and somewhat tired.   |
| _____ | _____ | I feel my age, but it does not bother me.  |
| _____ | _____ | As I look back on my life, I am fairly well satisfied.                                     |
| _____ | _____ | I would not change my past life even if I could.   |
| _____ | _____ | Compared to other people my age, I make a good appearance.                                 |
| _____ | _____ | Compared to other people my age, I've made a lot of foolish decisions in my life.          |
| _____ | _____ | I have made plans for things I'll be going to do a month or a year from now.               |
| _____ | _____ | When I think back over my life, I didn't get most of the important things I wanted.        |
| _____ | _____ | Compared to other people, I get down in the dumps too often.                               |
| _____ | _____ | I've gotten pretty much what I expected out of life.                                       |
| _____ | _____ | In spite of what some people say, the lot of the average man is getting worse, not better. |

Part II

Would you please comment freely in answer to the following questions?

1. What are the best things about being the age you are now?
2. What do you think you will be doing five years from now? How do you expect things will be different from the way they are now in your life?
3. What is the most important thing in your life right now?
4. How happy would you say you are right now, compared with the earlier periods of your life?
5. Do you every worry about your ability to do what people expect of you, to meet the demands that people make on you?
6. If you could do anything you pleased, in what part of the world would you most like to live?

Here are several questions. In each case, indicate your answer by placing a check after the appropriate word or phrase.

1. How often do you find yourself feeling lonely?  
Never \_\_\_ Hardly ever \_\_\_ Sometimes \_\_\_ Fairly often \_\_\_ Very often \_\_\_
2. How often do you feel there is no point in living?  
Never \_\_\_ Hardly ever \_\_\_ Sometimes \_\_\_ Fairly often \_\_\_ Very often \_\_\_
3. Do you wish you could see more of your close friends than you do or would you like more time to yourself?  
Wish could see more \_\_\_ More time to self \_\_\_ Okay as it is \_\_\_
4. How much unhappiness would you say you find in your life today?  
A good deal \_\_\_ Some \_\_\_ Almost none \_\_\_
5. As you get older, would you say things seem to be better or worse than you thought they would be?  
Better \_\_\_ Worse \_\_\_ About what I expected \_\_\_
6. How satisfied would you say you are with your way of life?  
Very satisfied \_\_\_ Fairly satisfied \_\_\_ Not very satisfied \_\_\_

Background and Information Inventory

Instructions: Please circle the letter of the alternative which is appropriate.

1. In what part of the country did you live most of the time before you were 18?
  - a. The Northeast
  - b. The South
  - c. The Middle West
  - d. The Pacific Coast
  - e. Outside the United States
2. The place in which you spent the most time during your early life was:
  - a. Farm
  - b. Town of less than 2,000
  - c. Town of 2,000 or more, but less than 10,000
  - d. City of 10,000 to 100,000
  - e. City larger than 100,000
3. In what section of town did your family live longest while you were growing up?
  - a. Lived in one of the most exclusive sections of town
  - b. Lived in a good but not the best section
  - c. Lived in an average section of town
  - d. Lived in one of the poorer sections of town
  - e. Lived in a rural area
4. In how many different cities, towns, or townships have you lived?
  - a. 1 to 3
  - b. 4 to 6
  - c. 7 to 9
  - d. 10 to 12
  - e. 13 or more
5. In what type of community are you now living?
  - a. In the country
  - b. Town of less than 2,000
  - c. Town of 2,000 or more but less than 10,000
  - d. City of 10,000 to 100,000
  - e. City larger than 100,000
6. In your home town, what was the main source of income?
  - a. Agriculture, dairy, etc.
  - b. Industry or manufacturing
  - c. Wholesale, retail, or tourist trade
  - d. Petroleum or mining
  - e. Diversified

7. In what size city would you prefer to live?
  - a. Rural or country
  - b. 5,000 or less
  - c. 5,000 to 50,000
  - d. 50,000 to 200,000
  - e. 200,000 or more
8. What kind of school did you attend between the ages of 12 and 18?
  - a. Military
  - b. Private or parochial
  - c. Public
  - d. Vocational and trade
  - e. Did not attend school
9. What is your present marital status?
  - a. Single
  - b. Married, no children
  - c. Married, one or more children
  - d. Widowed
  - e. Separated or divorced
10. How many persons (not including yourself) are dependent upon you for all or most of their support?
  - a. None
  - b. 1
  - c. 2 or 3
  - d. 4 or 5
  - e. More than 5
11. Did your parents live together all the time you were growing up?
  - a. Yes
  - b. No, because one died
  - c. No, because they both died
  - d. No, because they separated
  - e. No, because they were divorced
12. Under usual conditions, how often do you attend religious services?
  - a. Twice or more a week
  - b. Every week
  - c. Once or twice a month
  - d. On special occasions (such as Easter)
  - e. Do not attend services
13. Religion in your home was considered as:
  - a. An essential part of home life
  - b. One of several factors which were important
  - c. A relatively unimportant factor
  - d. Something to be left out of our family life
  - e. One's own business

14. How did you and your parents feel on the matter of religion?
  - a. Were in close agreement
  - b. Usually felt the same on important matters
  - c. Disagreed on most important matters
  - d. Disagreed completely
15. As a young man, were you any of the following?
  - a. A church member and active in church activities
  - b. A nominal church member
  - c. A religious rebel
  - d. A non-churchman without any great religious conviction
  - e. None of the above
16. Do you feel that your financial resources for your retirement years are
  - a. extremely adequate
  - b. quite adequate
  - c. average
  - d. quite inadequate
  - e. extremely inadequate
17. How often do you drink beer, wine, or liquor?
  - a. Never
  - b. Daily
  - c. Weekly
  - d. Monthly
  - e. Very few times a year
18. What do you feel has been your major accomplishment, outside or work?
  - a. Family activities
  - b. Community activities
  - c. Development of yourself
  - d. Development of your social activities
  - e. Something else
19. What is your attitude toward gambling?
  - a. It is stupid
  - b. It is morally wrong
  - c. It is exciting
  - d. It is a good recreation
  - e. You can take it or leave it
20. To what extent are you still friendly with the people you knew in school?
  - a. Not at all
  - b. Friendly with a few of them, on rare occasions
  - c. Friendly with some, but see them irregularly
  - d. See some regularly
  - e. Close friends to quite a few

21. Where do you and your friends get together most often?
  - a. At your home
  - b. At a friend's home
  - c. At a church or club
  - d. At a theatre, restaurant, or other public place
22. When you were growing up, about how many books were around the house?
  - a. A large library
  - b. Several bookcases full
  - c. One bookcase full
  - d. A few books
  - e. Only a few children's books
23. As a youngster, how did you "let off steam" when you were angry?
  - a. By fighting
  - b. By kicking or throwing something
  - c. By swearing
  - d. By talking it over with someone
  - e. You didn't--you tried to hide your feelings
24. What kind of an upbringing did you have?
  - a. Strict but fair
  - b. Strict but unfair
  - c. Inconsistent
  - d. Not very strict
  - e. Almost no discipline
25. Who made the major decisions in your family?
  - a. Your mother
  - b. Your father
  - c. Some other person
  - d. Discussion and common agreement
  - e. Some other method
26. During your teens, your parents encouraged you to
  - a. Choose friends carefully
  - b. Continue your education
  - c. Read good literature
  - d. Save money
  - e. None of these
27. During your grammar and/or high school days, in which type of activity did you participate the most?
  - a. Sand-lot games
  - b. Boy Scouts, 4-H Clubs, FFA or YMCA
  - c. Student government, school politics
  - d. Student paper, science clubs
  - e. Worked or studied most of the time and did not participate

28. When you were in school (grade or high), where did you friends most often get together?
- At a friend's home
  - At a club, dance hall, or public building
  - At your home
  - At the corner
  - At church activities
29. What type of housing do you live in?
- Rented apartment
  - Rented house
  - Own house
  - Co-Op apartment
  - Live with relatives, etc.
30. If you were to suddenly inherit \$50,000 tax free, what would you do with the largest share of it?
- Pay off a mortgage
  - Put it in a savings account
  - Buy a new car or a new house or make some other major purchase
  - Take a vacation trip out of the country
  - Invest in "blue-chip" stocks or bonds
  - Invest in more speculative stocks or bonds
  - Some combination of the above
  - Don't know
31. What factors most influenced what you wanted to do as an occupation?
- Family
  - Expected income
  - Friends
  - Job opportunities
  - Counselors
  - Training opportunities
  - Desire to aid humanity
  - Accomplishment of an ideal in work
  - A person you admired
32. What was your father's chief occupation?
- Unskilled worker
  - Semi-skilled worker or skilled worker
  - Sales or office work
  - Supervisory work
  - Sub-professional (bookkeeper, pharmacist, draftsman, etc.)
  - Scientist (geologist, engineer, chemist, etc.)
  - Professional (lawyer, physician, teacher, etc.)
  - Businessman
  - Executive or large business or industry
33. How many years of school have you completed? (circle the highest grade completed)
- 6 or less 7 8 9 10 11 12 Some College College Graduate Work
34. How many years of school did your father complete? (circle highest grade)
- 6 or less 7 8 9 10 11 12 Some College College Graduate Work

35. How many years of school did your mother complete? (circle highest grade)  
6 or less 7 8 9 10 11 12 Some College College Graduate Work

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