

CHAPTER 1

Perspectives on the Life Course

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This chapter reviews perspectives on the life course from the standpoint of historical setting, organizing concepts, and an agenda for subsequent work. Consistent with the historical sensitivity of life course analysis, the chapter begins by placing this line of study within two widely separated periods—before 1940 and after 1960. Though of interest to researchers before World War II, life course or life history analysis declined as a research topic in the postwar era only to be revived in the 1960s within a broad range of the social sciences. The two principal organizing concepts of the volume, trajectory and transition, are considered next in terms of life course analysis and its agenda of research problems.

LIFE COURSE DYNAMICS IN HISTORICAL CONTEXT

As a field of inquiry, life course dynamics has known two eras of theoretical and research vitality, the phase before 1940, which is most closely identified with the early Chicago school of sociology, and the decades since 1960. In both eras, social change acquired problematic meaning for individuals and for society as a whole. Social change seemed especially consequential in altering the life course of individuals and age groups; and life trajectories were interpreted as potential expressions of such social changes as mass migrations, wars, and depressions.

Era I and the Life Course

The first wave of research interest in the life course accompanied the accelerating growth of cities resulting from migration and socioeconomic development. The intellectual vigor of the Chicago school (circa 1915-35) was manifested in its attention to the multiple problems of a rapidly changing society—waves of immigrants to cities, high rates of delinquency and crime, and family disorganization. Inspired by William I. Thomas and Florian Znaniecki's *The Polish Peasant in Europe and America* (1918-20), researchers began to use life records to study social change and individual trajectories. The lives of immigrants embodied the discontinuities and strains of the age; these people were socialized for a world that soon became only a memory. A leading figure in this movement, William I. Thomas (Volkart, 1951:593), urged that priority be given to the "longitudinal approach to life history." Studies, he argued, should investigate "many types of individuals with regard to their experiences and various past periods of life in different situations" and follow "groups of individuals into the future, getting a continuous record of experiences as they occur."

For reasons that are still elusive, Thomas's prescriptive agenda saw few empirical applications between the Great Depression and the War on Poverty of the 1960s. The qualitative life records advocated by Thomas were not compatible with the new positivism in social science following World War II. But this clash does not explain the growing popularity of individual life records in the post-1960 era, as seen in case studies with life documents (Runyan, 1982) and in the use of narrative life stories (Bertaux, 1981). The second wave of research on life course dynamics combines theoretical models of the life course, longitudinal samples or retrospective records, and statistical advances in the modeling of life course development and change. Procedures for collecting, storing, and retrieving continuous records of experience were also a product of this new wave of research.

Era II: Social Change and the Life Course

Three developments from the intellectual milieu of the 1960s offer a distinctive view of life course dynamics as a field of inquiry. First, there arose a renewed consciousness of and sensitivity to the bond between social change and the life course of individuals. Second, a number of theoretical developments, based on an understanding of age in society and history, helped to illuminate the relation between social and individual change. Third, the interplay between research and theoretical activities increased. Longitudinal studies in the 1960s were typically launched without theoretical knowledge of the life course, and yet their findings had important implications for this perspective. Consistent with Robert Mer-

ton's (1968) observations on theory and research, the story of life course dynamics includes the interplay of concepts and findings. The Michigan Panel Study of Income Dynamics was established without conceptual insights or hypotheses from an emerging life course framework, but its empirical contributions are a source of conceptual development.

Despite much evidence and argument to the contrary, studies of social change and life patterns had been carried out before the 1960s as if they had nothing in common. Several lines of inquiry effectively challenged this practice by suggesting a concept of the interaction of life patterns and social history. Norman Ryder's (1965) thoughtful essay, "The Cohort as a Concept in the Study of Social Change," also proposed use of the cohort as a concept for studying the life course. With its "life stage principle," the essay provided a useful point of departure toward greater understanding of the interplay between social change and the life patterns of age cohorts: the impact of a historical event on the life course of a cohort reflects the stage at which the change was experienced. The implications of mass unemployment or military conscription obviously vary among individuals of different ages, from children to the middle-aged and old. Dependents would experience these events primarily through change in the family environment, whereas young males are directly subject to economic and other social events. Differences in life stage give us an insight into the adaptive resources, options, and meanings that become potential elements in linking social change to life outcomes.

Ryder's essay on the bond between age and time brought more sophisticated awareness of the connections between historical and individual life time and, in doing so, provided fresh insight regarding the temporal aspects of lives. Once individuals are placed in historical context, the impact on them of historical events and circumstances must be considered. During this period, empirical study of such influences received encouragement from a new wave of research in social history. As Stephan Thernstrom (1965:242) put it, the real choice in social research is "between explicit history, based on a careful examination of the sources, and implicit history, rooted in ideological preoccupation and uncritical acceptance of local mythology."

The central message of Ryder's analysis posed worrisome implications for the study of age differences in psychological functioning. If social change differentiates the life trajectories of adjacent birth cohorts, then differences in behavior of people of different ages could be attributed to both historical and life changes. The classic example of this ambiguity involved an assumed intellectual decline over the last years of life, as measured across age groups (Baltes, Reese, and Lipsitt, 1980). An in-

terpretation of this trend could be based on aging countered by an equally persuasive explanation based on social change—the idea that younger Americans have higher levels of education than older people. The old may do less well on intellectual tasks merely because they are less educated on the average. Longitudinal research has since found empirical support for both interpretations. Social dynamics are an integral part of studies of life course dynamics.

A good many of these ideas can be found in early writings during William I. Thomas's era, especially in Karl Mannheim's (1928) essay on generations (or cohorts) and in anthropological work on age and the life cycle (Kertzer and Keith, 1984), but they were not put to work at the time in systematic study of life course dynamics. This observation applies to social age as well as to the historical age of cohorts. As developed by the writings of Bernice Neugarten (with Datan, 1973), social age refers to the social timetable of the life course, as defined by people's expectations or norms at different ages. In theory, age expectations specify appropriate times for major events and transitions. There is an appropriate time for entering school, leaving home, getting married, having children, and retiring. Departures from the usual life course entail normative and demographic consequences. In the mid-1960s, Neugarten and her associates (1965) found some evidence that men and women agree on the most suitable time for a woman to marry, and they conclude that informal sanctions are associated with being on time, late, and very early. Though little is actually known about the cultural foundations of the life course (its normative pattern), studies are beginning to document the consequences of life events that occur off time and out of sequence (Hogan, 1981). In this volume Sara S. McLanahan and Aage B. Sørensen provide the best examples of this line of inquiry with their study of the psychological consequences of life events that violate expectations.

The second wave of inquiry on life course dynamics is distinguished by a convergence of research and theory on the separate dimensions of social and historical age. The exemplar of this integration is *Aging and Society* (Riley, Johnson, and Foner, 1972). Age represents a basis of historical differentiation through cohorts and of social differentiation according to age-graded statuses and role sequences. Age strata thus order both people and social roles. Socialization and role allocation link people and social roles in the process of aging and cohort succession. This connection between historical age and cohort, on the one hand, and social age in the life course, on the other, has alerted investigators to the variable meaning of life events in history. Divorce is a case in point. With the sharply rising

divorce rate from 1960 to the 1980s, one might expect children of divorced parents to experience some change in the meaning and psychological effects of divorce (Seltzer and Furstenberg, 1983).

Women's employment represents a clear example of historical change in meaning. In the 1920s, when "rising expectations were part of the economics of family life" (Wandersee, 1981:9), women's employment had meaning in terms of the family economy or needs. The economic pressures and ideologies of the 1930s placed women of hard-pressed circumstances in a cross-pressured situation in which their work was both essential for the family and viewed as an attack on manhood, as in the theme of "taking jobs away from men." Though countless women from all strata entered the work force, such action was not a source of fond memories in later life, unlike employment during World War II. Working women during the war became homefront heroines to many (Campbell, 1979). A sense of being needed and valued made the long, tiring work days a heady experience. In these different periods a mother's employment no doubt presented different implications for daughters and their life planning.

From its rudimentary stage in the 1960s to the present, perspectives on the life course and its dynamics represent a theoretical orientation that defines a context for empirical inquiry. They identify relevant problems and variables, and they structure the generation of evidence and hypotheses. In this orienting function (see Merton, 1968:142), the perspective suggests questions, rationales for why they are important, and actual specifications of the questions for research purposes. The bearing of research on theory is equally important; longitudinal studies and life course analysis play an active role in shaping perspectives on the life course. Concerning this influence in general, Merton (1968:162–68) refers to unexpected findings and the discovery of new data that exert pressures to produce new theory. Longitudinal studies that began in the 1960s were potentially instrumental in developing notions about the life course, especially by producing knowledge about life course dynamics that has to be taken into account.

The Panel Study and Life Course Dynamics

The Michigan Panel Study of Income Dynamics provides many examples of research calling for compatible models. One of the motivations for this project was the assumption that poverty was self-perpetuating. People entered poverty through misfortune, the inheritance of an attitude of dependency from parents, or other circumstances; and they seldom managed to become self-supporting. Acquired values, beliefs, and definitions from adaptations to poverty presumably increased the likelihood of continued dep-

rivation. The Panel design offered a way to determine whether such views corresponded with reality. Is the poverty stratum a stable group in society? Are poverty and welfare passed on from one generation to another?

Two revised concepts emerged quickly as the Panel evolved over time. The ever-changing composition of households necessarily forced a shift to the individual as the unit of analysis because "individuals stay unique and definable and can be followed through time, while their family situations that affect them so much can change, in many cases through the actions of others" (Project memo, PSID 1978). Studying the careers and relationships of individuals clearly favored a different concept of family patterns as an emergent form, an evolving family life course. The other conceptual change centered on the nature of poverty status for both families and individuals.

Contrary to prevailing beliefs at the time, only a very small fraction of sample members who actually experienced poverty did so beyond a year or more (Coe, Duncan, and Hill, 1982). Transient members of the poverty category turned out to be indistinguishable from members of the general sample, whereas the chronic cases were typically in one or more of three categories, black, elderly, or female. Household composition, employment status, and earnings were the main determinants of entering, staying in, or leaving poverty. One-third of the persistently poor are over the age of sixty-five, and two-thirds of the remainder live in households headed by women. A large majority of these women are black. Richard D. Coe, Greg J. Duncan, and Martha S. Hill (1982:52) conclude from the Michigan Panel that most "welfare recipients remain on the welfare rolls for relatively short periods of time, most are never dependent on welfare income in a given year, and, even if they are, this dependency is short-lived." Changing relatively little in overall size, the chronically deprived category represents a more important and larger segment in the minority community than in the majority population.

Out of this research on families and individuals has come a life course model of the interactions between economic change and family adaptations (Moen, Kain, and Elder, 1983). Economic adversity prompts adaptations outside the household by having multiple earners in a family and by other means and within the household through alterations in family composition as people leave or enter. These adaptive responses, in turn, serve to modify the family's resources and economic situation which, once again, influence family decisions. In this manner compositional change represents both a determinant and a consequence of change in economic status. Divorce usually results in a much lower economic position for children in a one-parent household, and the economic pressures of this new situation may

require doubling up with relatives in a strategy of pooling resources. In the family household model, the family is a flexible unit whose economic status depends as much on the contributions of all of its members as on the workings of the outside economy. This dynamic model shifts attention from static concepts of income and occupation to reciprocal effects between family units and economic conditions in an ongoing process.

Up to this point, I have placed the study of life course dynamics in historical context by identifying two waves of theoretical work and research. The first wave, which ended before World War II, was inspired by leading figures of the early Chicago school of sociology, particularly W. I. Thomas and Ernest Burgess. Life records were the primary data source for Thomas and Znaniecki in *The Polish Peasant* (1918-20). Whatever the theoretical and research contributions of this line of work, it opened the field of life course to general study on the premise that individual lives, families, and communities are mutually dependent in a process of change. Following a postwar decline in life course work, the second wave of activity emerged through developments in theory, method, data resources, and research. A rudimentary age-based perspective on the life course resulted in theoretical gains. This advance has since been joined by the technical contributions of causal modeling and analysis of event histories (Tuma, 1982; Allison, 1982; Flinn and Heckman, 1982) along with the empirical riches of prospective longitudinal samples.

Three contemporary lines of research bear upon an understanding of life course dynamics, and together they provide an intellectual context for this volume's conceptual themes, trajectory and transition. One line of work investigates the pathways or career lines that are structured by formal organizations, social institutions, and markets. How are career lines formed and transformed (see Featherman, forthcoming)? Some career lines are characterized by vacancy chains resulting from the loss of people and the addition of new positions (Aage Sørensen, 1983). Vacancies create opportunities as well as deprivations in a competitive marketplace. At this level, we can also think of established durations for career lines or what Merton (1982) has called socially expected durations. An apprenticeship is defined by explicit time requirements, and so is a unit of military service. Though little research has focused on people's beliefs about socially expected durations, evidence appears in cultural notions about the appropriate length of acquaintance and engagement before marriage and about the most suitable spacing for births.

Through cultural and structural forces, established career lines present individuals with particular constraints, incentives, and options as they work out their trajectories. A second line of work focuses on these trajec-

ries. Not all workers in a firm follow a career timetable established or preferred by the company (Rosenbaum, 1979). In a family, decisions do not always conform to expected behavior. Some women have children before marriage, while others postpone childbearing until their late thirties. A third approach focuses on the relation between individual careers and the opportunity structure of career lines (Rosenfeld, 1979; Spennner, Otto, and Call, 1982).

Nationwide interview data in the Michigan archive favor studies of trajectories and transitions by cohort or subgroup without particular consideration of contexts. Thus women's work lives are analyzed in this volume by Phyllis Moen without considering type of workplace, firms, and specific marketplace. Children's residential patterns presumably depend on the availability of housing in local markets and on local institutions in the caretaking or service field. Contextual influences, however, must await analysis in the next phase of Hofferth's research on children's life course. Their complexity extends beyond the capacity of a single essay.

The social life course is viewed from a multidimensional concept of interdependent careers or trajectories—work life, marriage, and parenthood. Social differentiation is expressed in plural age structures and timetables across institutional spheres. Movement through the age-graded life course in each sphere may correspond with social expectations or depart markedly from them, as, for example, very early or late marriage. Paralleling this concept is a multidimensional view of life-span development, from intellectual functioning to personal worth and vocational skills. Development frequently consists of an uneven rate of change across dimensions, as in the relation between late social maturation and early physical maturity. The same point applies to the social life course. A late advance in work may be combined with early family events. An uneven rate of advance may also apply to relations between the life course and human development, such as a rate of physical maturation that does not mesh with the age-graded trajectory of school athletics through adolescence.

The social life course has been the primary focal point of sociological analyses, whereas various psychological dimensions appear in the studies of psychologists, especially within the specialty of life-span developmental psychology (Baltes, Reese, and Lipsitt, 1980). Life-span psychology gained coherence and visibility through a series of conferences at the University of West Virginia beginning in 1969. The approach is defined by a concern with the description and explanation of age-related biological and behavioral changes from birth to death. Life-span studies by psychologists tend to follow one of two styles: the long view in which a behavior, disposition, or trait is studied over a substantial period of the life span; and a more re-

stricted temporal scope of analysis such as a life stage within the broader life span. Margie Lachman's analysis of temporal patterns of personal efficacy in this volume is centered on a short span of the middle years in the lives of men. The different trajectories of men's sense of presumed efficacy have implications for the subsequent experience of old age and raise questions regarding precursors during the first half of the life course. The dual concepts of trajectory and transition are applicable to both lines of analysis, to life-span analyses in developmental psychology and to life course analysis in the social sciences.

TRAJECTORIES AND TRANSITIONS: CENTRAL THEMES AND DISTINCTIONS

The concepts of trajectory and transition are central themes in contemporary studies of life course dynamics and in the organization of this volume. They represent both the long and short view on analytic scope. Life course dynamics take place over an extended span of time; a trajectory of work or marriage, of earnings or self-esteem; and they also evolve within a short time span marked by the transition of specific life events—getting married and divorced, entering and leaving a job. Transitions are always embedded in trajectories that give them distinctive form and meaning. Indeed, it is now commonplace to specify at what point transitions occur within a social phase of particular trajectories, whether in young adulthood or in later life after the children have left home. Loss of a job has one cluster of meanings and implications when it occurs during the pressures of family building and quite another when it occurs before parenthood.

Life trajectory and transition refer to processes that are familiar subjects in the analysis of careers and life events. The language of careers has an illustrious history within the field of occupations and professions, and it represents one of the few conceptual languages that depict a temporal dimension or process. Work careers have been defined as an orderly progression of jobs (Wilensky, 1960) and as individual achievement (Spennner, Otto, and Call, 1982). In the latter sense, the term *career* has been applied to the pathways of marriage and parenthood (Hill, 1970). All of these uses fall within the more inclusive definition of a life trajectory, a pathway defined by the aging process or by movement across the age structure. As defined in this volume, trajectory does not prejudice the direction, degree, or rate of change of its course.

Life trajectories can be charted by linking states across successive years, the states of employment, for example, or of earnings and health. Each trajectory is marked by a sequence of life events and transitions, changes in

state that are more or less abrupt. Though life transition and life event have some meaning in common, they both entail a change in state. We use the former because it refers explicitly to this change, which may take place over a substantial period of time. Life event studies frequently adopt a process or transition perspective, as in Goode's (1956) study of marital dissolution: disenchantment, consideration of divorce, adjustments within the framework of marriage, separation, and postdivorce adjustments. The first birth, work entry, and retirement, among other transitions, can be viewed in much the same way, as multiphased processes. Using the Michigan Panel, Hofferth (1983a) has applied this perspective in a dynamic, sequential model of childbearing. If narrowly defined relative to transitions, a life event would be dated according to when the new state is entered, such as the beginning of disability or a period of unemployment.

Events and transitions lead to the concept of duration, the waiting times or spells between a change in state. Duration has many implications and meanings for the life course. Duration of marriage is linked to marital permanence, and residential duration predicts residential permanence (Ginsberg, 1971). Duration of unemployment is correlated with the risk of becoming unemployable. In all of these cases, duration typically stands for an explanatory process that is poorly understood. Pressures for socialization and conformity may be involved, as well as deepening social attachments and commitments. In this volume, Hofferth's analysis of children's household histories prompts the question of how specific domestic arrangements affect child care and children's development. An answer to this question provides an essential context for studies of the "consequences of duration in a given family type and of the child's age at which that experience occurred." The consequences of the duration of any event depend on what people bring to the situation. A single-parent household has different implications for the preschooler and the early adolescent.

Both interdependence and turning points are key features of the life course and its dynamics. Interdependence refers to the interlocking nature of trajectories and transitions, within and across life stages. This interweave of lifelines may generate turning points or a change in course. Both concepts appear in the following chapters and thus warrant brief discussion at this point.

Interdependence and the Life Course

Life course dynamics arise in part from the interplay of trajectories and transitions, an interdependence played out over time and in relation to others. Interdependence emerges from the socially differentiated life course of individuals, its multiple trajectories and their synchronization.

The interdependence among earnings, childbearing, and marriage is also expressed in the concurrence and overlap of transitions along different pathways, such as the transitions to adulthood (education, work, marriage) and retirement. Another dependency involves transitions as turning points in the life course and the relation between widely separated life transitions, as in the connection between career beginnings and endings (O'Rand and Henretta, 1982). Experiences in old age are shaped by the tempo and character of adult life.

The concept of a differentiated life course merely extends in time the familiar notion of multiple roles and their potential cross-pressures. We can thus approach competing life spheres or trajectories from the vantage point of role strain and the allocation of scarce resources. William Goode (1960) argues that each person's network of relationships is overdemanding. Some adjustment of demands is called for, perhaps by rescheduling or selecting conditions that are most supportive and least conflicting, such as part-time employment by mothers of young children (see Moen, in this volume). Change in the timing of events and demands represents a form of social adjustment.

Off-timed events in the transition to adulthood are known to have enduring effects, as in the sequence from early marriage to marital dissolution and economic pressure, or from early parenthood to socioeconomic disadvantage in old age (regardless of social background and education). Much less is known about disorderly event sequences. Late adolescence, for example, is characterized by a high degree of social differentiation along institutional lines. The late adolescent is in the process of entering multiple lines of adult activity, from work to marriage and parenthood. At any point in time, a cross-section of the youth population shows a high degree of variation in stage or position across dimensions of the life course. Some marry early and others late. In both cases, marriage may come before or after completion of education and parenthood. Since the late nineteenth century, the historical trend has moved toward greater compression of these early life events (Modell, Furstenberg, and Hershberg, 1976). Role overloads are a likely result, along with the risk of atypical sequences among events, such as marriage before employment.

Interlocking trajectories can be viewed prospectively and retrospectively or by working backward in time. The question at hand is the distinguishing factor. Is the objective to determine how people leave a state and where they go, or is it to determine how they arrive at a destination? A prospective or outflow approach begins with various social roles and situations at t_1 and depicts the evolving life course, its continuities, turning points, and branches. Thus women in the homemaker role at t_1 (small children at

home) might be followed across ten or twenty years, with emphasis on factors that account for adult education, entry into the labor market and work advancement. The origin group becomes differentiated over time on the life trajectory. This design is well suited to investigations of the process by which historical changes make a difference in the life course. The event's influence branches out over time.

Conversely, a retrospective or inflow analysis would assume that the meaning and implications of women's midlife position as full-time homemakers are partly dependent on the life histories or trajectories they brought to this situation. Homemakers might include early workers who married late, the never employed, and periodic workers. Contrary to the state-dependence assumption of Markovian analysis, this approach assumes that the behavior of homemakers is best explained by using knowledge of the diverse life histories of these women.

Whether we choose one or the other design, our understanding of the life course would be expected to vary according to the conceptual unit—trajectory or transition. For example, why do some women follow a conventional work life in which they leave paid employment at marriage or before the first child's birth and do not return, while other women do return, both early and after all children have been launched? Later-marrying women are most likely to follow a conventional career (Elder and Rockwell, 1976; Annamette Sørensen, 1983), although the relevance of late marriage is unclear. A trajectory analysis seems to suggest that women who marry late are more inclined to sacrifice their own work lives and self-interests for family needs than are young brides. But this conclusion makes little sense when we consider the higher educational level of late brides. Moreover, available evidence suggests that attachment to work is related to duration of work experience; and women who delay marriage will have worked longer. In a study of the 1938 birth cohort, Sørensen (1983) resolves the puzzle by moving to the microlevel of transitions. The prevalence of conventional careers among late brides expressed two contrasting processes. When compared with other women, late marriers were less likely to leave the workplace for home at marriage or birth of a child, thus supporting the career attachment hypothesis, but the women who did leave were also less likely to reenter the work force after the first child's birth.

Linking Early and Later Events

A final observation on interdependence brings up the unique contribution of the life course perspective to an awareness of connections between widely separated events and transitions, as in the relation between young adulthood and old age. For years, studies of old age proceeded as if adapta-

tions in later life could be understood without reference to the earlier decades of experience. This position is now challenged by a large and growing body of empirical evidence. The experience of old age has much to do with early hardship in the adult years and one's response to it (Elder and Liker, 1982) and to career beginnings (O'Rand and Hemretta, 1982). Variations in the transition to adulthood leave a durable imprint on the course that follows.

No study in this volume explores the connection between widely separated events, though one of the authors (Hofferth, 1983b) has done so with Michigan Panel data from the survey of 1976. The basic question in this study concerns the economic legacy of childbearing in old age. Drawing upon life course and economic theory, Hofferth argues that late childbearing and a small completed family are highly conducive to the economic well-being of women after age sixty. The data show that both factors were favorable to the accumulation of assets and to the status of assets after age sixty. A satisfactory understanding of the linking mechanisms requires a more thorough analysis which draws upon the records of a longitudinal panel.

Another way of phrasing such interconnections over the life course is to say that events and transitions modify life trajectories. Some events are important turning points in life—they redirect paths. The lifetime effects of ordinary events and turning points cannot be appraised without taking into account four sets of variables: (1) the nature of the event or transition, its severity, duration, and so on; (2) the resources, beliefs, and experiences people bring to the situation; (3) how the situation or event is defined; and (4) resulting lines of adaptation as chosen from available alternatives. The first three factors influence lines of adaptation, but the latter links events and the subsequent life course. Lines of adaptation represent a process of constructing the life course. The same event or transition followed by different adaptations can lead to very different trajectories.

A useful illustration comes from a study of adolescent childbearing and its consequences in a predominantly black sample (Furstenberg, 1976). The girls faced a number of decisions after the birth: abandoning the child, putting the child up for adoption, marriage or single parenthood, more illegitimate births, obtaining additional education, getting a job, early entry into the public welfare system, or seeking economic independence. Marriage proved to be the critical event in prospects for economic recovery because the young mothers entered the labor market with many handicaps. They were deficient in education and experience, younger than competitors, and often school dropouts. In the face of both gender and racial discrimination, the jobs they obtained often did not cover the expenses of

child care and maintenance of a family. If other adults were present in the household, the young mother could use this economic and child-care assistance to enable her to complete school. Finally, if the young mother had additional births, child-care problems often rendered it impossible for her to get a job that offered adequate income. Persistent economic dependence thus turned more upon the responses of young mothers to their maternal situation than on the event of an early birth itself.

A Promising Agenda

A reasonable ambition for the early stage of a new enterprise is to make a solid beginning toward objectives and to clarify an agenda for subsequent work. This collective venture in life course dynamics was conceived as a developmental project from the very beginning—to develop the possibilities for life course studies of the Michigan Panel archive and to incorporate research from diverse fields. The common venture was an intensive, two-step workshop, the first session for gaining mastery over the data set regarding questions at hand, and the second session for refining the application of life course questions and models to panel research.

The results of this project include the chapters in this volume that may become points of departure for the investigators themselves and for others. The chapters represent a beginning or first step along specific lines of inquiry and they generally suggest an agenda for future research. Results of the project extend beyond this volume to a variety of initiatives and incentives, especially concerning the need to make the archive more accessible to social scientists and more useful by improving survey items and breadth of substantive coverage.

Within the workshop itself, a good many frustrations that arose through efforts to build and use PSID files have been addressed by the Michigan staff, as noted in Duncan and Morgan's thorough chapter. For the first time, a user's manual that discusses critical issues is available through the Institute for Social Research at Ann Arbor. In addition, the data-collection process is now under the scrutiny of a National Board of Overseers, with representatives from economics and sociology. One result of this working group is greater knowledge of the quality and representativeness of the Michigan Panel data. Special studies have been commissioned to provide such knowledge (Beckett et al., 1983; Cannell et al., 1983). Actions of the board have resulted in more adequate measurement of event histories and the promise of more satisfactory coverage of important areas, from the lives of women to physical and mental health. All of these changes increase the range of possibilities for studies of life course dynamics.

The workshop process that led to completion of this volume exemplifies

the interplay and blending of data, theory, and method, along with originating questions. Some initial participants found that they could not address a particular question with the Michigan archive and decided reluctantly to look elsewhere. The virtual absence of useful psychological measurements made the archive least attractive to psychologists interested in studying the life span. Indeed, the popularity of items on personal efficacy in the volume owes much to the absence of viable alternatives in measuring psychological functioning. Likewise, questions concerning the affection and authority relations of households could not be empirically tested with the Michigan data.

In many respects, limitations of the archive represent "an unseen hand," relating theory, data, method, and research question. Three examples expand upon these points. The first elaborates observations on psychological measurements by noting the time constraints as well. Information on personal efficacy and self-esteem was collected from 1968 through 1972, a five-year span that misses the energy crisis of 1973-75 and the worst economic decline (1980-82) since the Great Depression. Therefore, work-life and economic records during these periods cannot be linked to such attitudes. The five-year span also restricted the choices of several of the authors in this volume. For example, Lachman's narrow temporal scope for a study of men's sense of personal efficacy is a matter of necessity, not choice. She would have preferred five or more data points across twenty to thirty years.

The second example involves the interview of wives in 1976. As the only interview of women, its data restricted the design of Moen's study of women's work lives. In order to use the 1976 survey to measure outcomes, she had to define this year as the last in her file. Work experience during the last half of the 1970s and early 1980s was necessarily excluded. If the PSID women are interviewed again, as planned, Moen could extend her study up to the present.

A third and last example concerns requirements of the sample for analysis and the unit of observation. The Michigan Panel sample is large by any standard, but it is not large enough for some statistical analyses, including study of the residential histories of children (Hofferth) and of life events (McLanahan and Sørensen). Both studies maximize information or cases by defining person-year as the unit of observation; information for adjacent years (such as 1970-71) is paired to yield data on change in state and stability. All person-year units are pooled. Although this procedure loses the relation between age and event (see Hofferth's discussion), some age-grading can be retained by pooling units within age periods.

These limitations should not obscure the more important opportunities

for users of the Michigan archive, especially considering recent and proposed changes. In the spirit of a promising agenda, brief mention of such opportunities concludes this chapter. Three extensions for life course dynamics come to mind. They are (1) the contextual properties of the life course; (2) a model of the life course that broadens the perspective beyond one and even two generations; and (3) a formative process in life trajectories. To introduce these areas of research, I use Hofferth's study of children's residential histories.

The Context of Lives

Using twelve years of archival data, Hofferth identifies the residential trajectories that black and white children have followed to adulthood. Each trajectory represents a sequence of living arrangements—with both parents to single parent, grandparent, and so on. If we think of a trajectory as a socialization career, what are the long-term consequences of such environments, extending all the way to the adult years? Does the timing and sequence of a change in trajectory make a difference in children's lives and in their life chances?

Since children born to PSID couples are added to the sample, it is possible to compare adults who have experienced very different residential histories. To assess the long-term effects of each trajectory, one would need to know something about the socialization implications of particular household types (for example, children living with both natural parents, a blended family, and so forth), as well as the relation between income and residential trajectories. Change in residence often represents an adaptation to economic change or loss, a way of reducing expenditures. The change may even involve long-distance mobility or migration (Sandefur and Scott, 1981). The enduring implications of children's residential trajectories thus entails the correlated dynamics of income and mobility processes, a subject well suited for investigation with Panel data.

Beyond these considerations, one might extend the analysis by comparing life course dynamics across selected settings. Nationwide, representative samples and panels are typically coupled with analyses that divorce people and families from particular settings. This practice has been the rule in studies based on the Michigan Panel. Knowing what we do about kinship networks in rural and urban areas, the same residential history (especially if marked by breaks and other changes) should have different implications for the life course in each setting (Elder, 1984). Areas with markedly different rates of unemployment and attitude mentalities would be expected to influence differentially the psychological effect of job and income loss. The potential for bringing strategic contexts into a study of the life course with

PSID data is both large and untapped. Institutional and demographic areal data could be (and have been) merged efficiently with files based on the Michigan Panel.

Interlocking Trajectories across the Generations

Study of the individual life course has frequently ignored the broader context in which it is embedded, such as the life trajectories of family members and kin. This individualistic bias is most apparent in the burgeoning field of life event studies. Judging from measurements and research to date, the important life events are those that occur within a person's life (Barrett et al., 1979). Divorce, remarriage, occupational failure, and severe illness or impairment matter when they occur in the individual's life course but not when they occur in the lives of related individuals such as parents, children, and grandchildren. In the well-known Social Readjustment Scale of Holmes and Rahe (1967), only the death of a child counts in the life change inventory of parents. Empirical reality suggests a very different model, one which views the life courses of each generation as interlocking trajectories. The divorce, unemployment, and successes of children, parents, and grandparents have consequences for their respective individual life experiences.

The empirical contributions to this volume do not use concepts of a life course embedded in a matrix of kinship trajectories, and this is partly because of the questions addressed. The PSID, however, is well suited to this line of study. From 1968 to the present, all children of PSID couples have been added to the Panel when they left home and established independent domiciles. Some of these children are now parents, thus perpetuating the family cycle into a third generation. Family records may be available on as many as five generations in the Michigan Panel. There is much to be gained by a multigenerational design.

Two other extensions of the life course perspective may be useful from the perspective of kinship. One concerns the family cycle in which one generation is replaced by another through sexual and social reproduction. This cycle depicts a process in human populations from birth to death. It is not a process that involves all members of the population. Some couples have children while others do not and thereby follow a pathway that is not structured by parenthood. The never married without children represent another population subgroup that has no relevance to a family or intergenerational cycle. The second concept refers to a lineal extension across successive generations, from child to parent, grandparent, and great-grandparent. A brief discussion of the family cycle provides a context in which to consider the life course across three or more generations.

The family cycle is generally measured by stage typologies. One of the best known is Reuben Hill's (1964) model, which uses information on change in family size, major change in the status of the eldest and youngest children, and the father's occupation. In basic design, the nine stages represent phases in the reproduction cycle, from the newly married to stages of parenthood, the launching of children, the postparental family, and the aging family. As charted in the typology, children grow up and leave home, all in relation to "timeless" parents (no age data are included for the parents). New parents may be in their mid-thirties or in their early twenties, a difference that can make a large difference in economic stress and well-being. Overall, stage models yield "snapshots" of family development which tell us little about the actual course of a family's history or experience (Elder, 1978). Families that march through an identical sequence of stages can vary markedly in their respective life courses. Much of this variation is the result of the variable timing, order, and duration of family events, as determined from age data.

The family or intergenerational cycle adds a distinctive feature to the life course perspective by connecting the lives of parent and child. Indeed, the cycle concept refers explicitly to this link. Accordingly, the full scope of the cyclical model requires a multidimensional concept of the life course for adult offspring, a moving set of interlocking trajectories such as work, marriage, and parenting. Misfortune and opportunity across these pathways may become intergenerational as well as lifetime problems. Failed marriages and careers frequently lead adult sons and daughters back to the parental household and have profound implications for the parents' life plans for their later years. Conversely, economic setbacks and divorce among the parents of adolescents may impede their transition to adulthood by postponing leaving home, undertaking higher education or employment, and marriage. Each generation is bound to fateful decisions and events in the other's life course.

This field of influence or dependence has been expanded beyond the traditional two-generation cycle in recent years in response to the generational realities of a lengthening life span. Gunhild Hagestad's (1982) studies at opposite ends of the life span: the Alpha dyad of young parent and child and the Omega dyad of late middle-aged parents and their surviving parent. The youngest member of this four-generation family can anticipate moving across four generational stations in her or his lifetime, from child to the responsibilities of child and parent in the middle stations and then to the Omega position. Depending on many factors, but especially the timing of marriage and births, the age spread from Alpha to Omega can differ mark-

edly. In one case, a ninety-two-year-old grandmother is paired with her college-age great-grandson, while another family shows a seventy-year-old Omega with her youngest descendant of two years.

Timetables in the life course acquire particular significance when they are viewed across the generations. The interweave of generational trajectories means that their temporal coordination has noteworthy implications for each life course. An example is the notion of family pressure points that occur when resources are equaled and surpassed by demands (see Oppenheimer, 1981). Within the ordinary life course of a family, the key pressure point generally occurs during the childbearing and rearing phase, although even more severe pressures at a later date may arise from a conjuncture of off-time events in the lives of offspring, parent, and grandparents. A very late age at childbirth is often coupled with childrearing problems through the adolescent years and with the dependency requirements of parents and grandparents. This pressure would increase markedly if parental dependency arrived early through unexpected health impairments. The burden of bringing up adolescents may reflect the mounting caretaking pressures of aged parents. Likewise, the quality of a son's care for elderly parents may depend on the extent to which his children leave home and achieve economic independence. The strengths and vulnerabilities of older and younger generations may offset or reinforce one another.

The temporal distinctions of age and kinship show little correspondence in the life course of families and individuals. Age data locate people in precise historical contexts (according to birth years) and in the social structure, a precision unmatched by the timeless nature of generational status. The sequence from child to parent and grandparent applies to all times and places. Moreover, members of a specific generation may vary in age by as much as forty years. Such differences highlight the complementary perspective of age and kinship on the life course. The study of age brings historical considerations and insights on age-grading to the life course of individuals and families, while intergenerational analysis highlights the given nature of family ties, the interlocking trajectories of each generation, and the cross-generation process by which historical experiences and influences are transmitted. By restricting the concept of generations to "relations of descent," "some interesting questions for the sociological study of age and the life course can be raised, for we can ask what is the relationship between generation and age?" (Kertzer, 1982:47; 1983). Equally important, the two theoretical traditions enable us to address different questions on life course dynamics, especially in relation to the process of life course formation and change.

Control Cycles as a Formative Process

An agentic concept of individuals in shaping their own trajectory has been a central principle of the life course framework (Lerner and Busch-Rossnagel, 1981), and few studies provide more empirical documentation of this notion than the present volume.¹ The individual as actor bears some resemblance to the concept of personal efficacy, a measure of perceived control over outcomes. Significant loss events are often less likely to occur among persons with an efficacious outlook (Duncan and Morgan, 1980), but their occurrence also tends to diminish this outlook (Augustyniak, Duncan, and Liker, and McLanahan and Sørensen, this volume). The process brings to mind a circle of causation (Smith, 1968:277) in which failures, experienced and anticipated, make "one hesitant to try. What to others are challenges appear to him as threats; he becomes preoccupied with defense of his small claims on life at the expense of energies to invest in constructive coping."

More than fifty years ago, W. I. Thomas portrayed the trajectory of life as one marked by the recurring loss and recovery of control potential. Opportune situations for modifications or a change in course are those which represent a break from the customary, a disturbance of habit in which customary behavior can no longer be maintained. The individual is not able to produce life outcomes that are in line with expectations or claims. Crises "may arise when claims are elevated well beyond control of outcomes" (Elder, 1974:10). Novel adaptations to crisis situations are ways of dealing with resources and options in order to achieve control over the environment. Even within the age-graded life course, transitions to new roles entail some loss of control and prompt efforts to regain control through adaptations. This control cycle is also set in motion by large-scale historical events and processes, as in Thomas and Znaniecki's study of rural to urban migration. According to Thomas, the extent to which any transition entails a loss of control is contingent on the resources or level of preparation people bring to the new situation.

Thomas's thinking along these lines during the first wave of life history studies has much in common with contemporary work. Thus in the Johns Hopkins panel study of the first birth (Entwistle and Doering, 1981), level of

1. The concept of individuals as producers of their life course also appears in the first wave of life course studies. In a prefatory essay to Waldeck's well-known "life record," a major section of *The Polish Peasant*, W. I. Thomas and Florian Znaniecki (Volkart, 1951:162) observed that "the individual can indeed develop only under the influence of his environment, but on the other hand during his development he modifies this environment by defining situations and solving them according to his wishes and tendencies."

preparation (from parenthood classes and the like) and husband's participation markedly increased the rewarding aspects of women's experience of the birth by increasing their awareness and sense of control. As a rule, women who remained "in control reported higher-quality birth experiences" (p. 252). Predictable transitions across the life course (normative, age-graded) enhance prospects for sufficient training or preparation, as Orville G. Brim and Carol Ryff (1980) make clear, but the anticipation and rehearsal of life change, along with social support, do not altogether eliminate the experience of losing control. Even threats of loss of control in work and neighborhood may prompt adaptations that change the course of one's life, such as changing jobs and residence.

Research during the past decade has brought greater understanding of the psychological link between losing control and efforts to restore control over life outcomes, as in the literature on personal control and reactance behavior. Reactance feelings occur whenever one or more freedoms or expectations are threatened or eliminated. Such feelings motivate efforts to regain control. Sharon S. Brehm and Jack W. Brehm (1982:375) refer to the overwhelming evidence for such motivation: "A problem threatens control, whether it is a matter of understanding, attitudinal disagreement, or explicit loss of control. It is the threat to control (which one already had) that motivates an attempt to deal with the environment. As the attempts to deal with the environment can be characterized as attempts to regain control."

One of Thomas's memorable contributions to formative moments in the life course is the theorem that if people "define situations as real, they are real in their consequences." He argued that "we cannot neglect the meanings, the suggestions which objects have for the conscious individual, because it is these meanings which determine the individual's behavior" (Volkart, 1951:156). On the larger screen of the life span, defining the immediate situation has much in common with Thomas's ideas regarding life planning and life organization.

Life plans are based on concepts or definitions of the future life course. Revised thinking about the future prompts new life course planning—the situation has changed. As a means of controlling social reality for personal needs, the individual in Thomas's analysis devises general schemes of situations with goals, a life organization with a plan for subsequent action. This organization represents a continuing "project" of construction and reconstruction as new experience is encountered that cannot be assimilated. The more drastic the change in life experience, the more one's life organization must be recast and the more the transition marks a probable

turning point in trajectory. Major crises, then, are times that increase the likelihood of reorientation in life structure, direction, and purpose. They are times that make life planning a conscious act.

Four general points summarize the relation between control cycles and life course dynamics: First, the disparity between claims/expectations and resources may occur through rising claims, declining resources, and a discontinuity between acquired and needed resources. Rising claims are often expressed in the idealization of marriage partners, children, and work. Loss of significant others and economic misfortune could account for declining resources. Second, the experience of losing control over one's life situation evolves from the above disparity. Third, efforts are made to restore control or modes of accommodation and resignation are adopted. Control may be restored by adjusting claims, resources, or both in terms of their relation. Fourth, potential alteration of the life course occurs through new lines of adaptation and their consequences. This process is precipitated by an event, condition, or process that substantially changes the balance between claims and resources, the actor's control potential. Adaptive possibilities depend on conditions, the structured situation, and its alternatives. Responses to life change and the loss of personal control entail choices among structured options, and this structure is one way a social institution shapes the life course. Action alternatives also depend on the resources people bring to the new situation.

Conflicts and stress across the life span initiate an organizing function in the life course because they often require new adaptations or adjustments that structure and restructure trajectories. One dynamic in this process involves the loss and restoration of personal control, a view that corresponds with expanding knowledge of personal control, adaptation, and health. Contextual analysis of the life course, using historical placement and the social ecology, as well as research on life course formation, are only two topics that claim attention on the agenda of future work. Other proposals come from the studies in this volume. To understand the data archive for these studies, we turn now in Chapter 2 to a guided tour of the Michigan Panel Study of Income Dynamics.

OVERVIEW

This introductory chapter has provided an overview of four central features of the volume: (1) the workshop as a learning and influence process; (2) a historical perspective on life course dynamics as a research problem in social science; (3) the organizing framework based on the concepts of trajectory and life transition; and (4) the issues, questions, and lines of

research emanating from the chapters to form an agenda for subsequent studies.

The orienting framework of the two life course workshops sought to establish common ground through a general analytic framework, the life course, and a single data archive, the Michigan Panel Study of Income Dynamics. Despite wide variation in research questions and in method, all empirical chapters make some use of the life course concepts, principles, and models in their analysis of the Michigan Panel data. Collectively, the workshop participants helped to promote needed improvements in the accessibility and content of the data archive. In turn, the participants gained more effective mastery in conducting life course analysis and in using the Michigan archive. The fruitful interplay of theory and data encouraged fresh thinking about old problems and practices, as well as exploration of new modes of analysis.

A temporal-historical dimension is central to the study of life course dynamics in several respects. First, these dynamics evolve both over the life span and across the historical record. Status changes in any life period may reflect historical change as well as the effect of life stage and transitions. Related to this observation is sensitivity to the historical times of a sample such as the Michigan Panel. This project was launched at the end of the 1960s and continued across the 1970s with annual surveys. Any generalization beyond this time period is at least questionable. Developments during the 1960s are most germane to this volume, from theory to method and data.

Two concepts provide an orienting framework across the chapters. The concept of trajectory offers a long view of the life course, a perspective that is commonly identified with the study of careers. Each life course entails multiple, interlocking trajectories; their scheduling and management is one aspect of life course development. The chapters in Part II examine the relation between residential trajectories and kin exchange, between work and health, and between family obligations and work. A more restricted perspective on the life course appears in the process by which people move from one state to another. These transitions are marked by events on the trajectories of work, marriage, and parenthood. Some events are age-graded, such as first marriage, while others bear no relation to age. The latter are generally unexpected and thus limit both adequate preparation and social support. The impact of a life transition cannot be understood apart from knowledge of its temporal context (for example, divorce in one's twenties or fifties) and of the resources people bring to it. Part III of the volume applies some of these conceptual distinctions to life transitions and their psychological effect.

A study may generate more questions than it answers and thereby suggest a promising agenda for subsequent inquiry. As initial efforts in a lengthy venture, the empirical studies in this volume contribute fewer answers than questions. Apart from questions, the agenda calls for more contextual uses of the Michigan Panel data, as in the selection of contrasting areas of economic growth. Another goal on the agenda is to view the life course of successive generations as interrelated. Events have personal consequences when they occur in the lives of near relatives. A third addition to the agenda is the task of understanding how the life course forms, evolves, and dissolves. The life course perspective and the Michigan Panel Study of Income Dynamics bring to mind a seemingly endless array of research possibilities.

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