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Life Satisfaction Index for the Third Age – Short Form (LSITA- SF): An Improved and Briefer Measure of Successful Aging

Andrew J. Barrett II, Ed.D, and Peter J. Murk, Ph.D.

Abstract

The purpose of this research was to develop an updated and briefer scale based on the theoretical framework that Neugarten, Havighurst and Tobin (1961) used to design the Life Satisfaction Index—Form A (LSI-A). The new instrument, the twelve item Life Satisfaction Index for the Third Age—Short Form (LSITA-SF), was derived from the thirty-five item LSITA previously reported at the 2006 Conference. The reliability of the LSITA-SF scale was .90 with satisfactory content, construct and criterion validity.

Introduction

The past three years have seen a considerable amount of study of the psychological adjustment of people as they grow older. But the concept of adjustment as applied to adults in a modern society is so complex that these studies have merely served to outline the problem and to suggest some useful approaches to it, leaving a thoro (sic) exploration of it to the future. An important characteristic of current research in gerontology is the amount of study being devoted to middle age rather than to old age. This signifies an interest in the process of aging and in getting knowledge which will provide a basis for a preventive mental hygiene that will help people to make a better adjustment in their later years. (Havighurst & Orr, 1955, p. 447)

Our society is changing in many ways that relate to age. Perceptions of the periods of life are being altered, as well as role transitions, social competencies, and the ages that mark their boundaries. New inconsistencies with regard to age-appropriate behavior are appearing in informal age norms as well as in the norms codified in law. Some of these changes are occurring because of increasing longevity; others are taking place because of the rising educational demands of a technological society, alterations in family structure, changes in the economy and in the composition of the labor force, and changes in formal systems of health and social services. (Neugarten & Neugarten, 1986, p. 34)

Barrett and Murk (2006) reported on the development of the Life Satisfaction Index for the Third Age (LSITA) at the 25th Annual Midwest Research-to-Practice Conference in 2006. This 35-item instrument was based on the theory of successful aging reported by Neugarten and Havighurst and their colleagues in the 1960's as part of a major research project into adult life in Kansas City, Missouri (Neugarten, Havighurst, & Tobin, 1961). These pioneer researchers quoted above developed the 20 item Life Satisfaction Index—Form A (LSI-A) to measure successful aging which became, according to Lawton, “one of the most frequently used scales in the area” (as cited in Helmes, Goffin, & Chrisjohn, 1998, p. 13). However, with the improvement in statistical and measurement knowledge, an updated instrument with improved psychometric

properties was needed and the LSITA became the outcome. As reflected above, the research into aging and, more specifically, successful aging, was considered important from over sixty years ago and on into the present.

There have been many requests by a wide variety of scholars and researchers from the US and international locations seeking to use the LSITA. Their research projects included national survey efforts in Great Britain to identify a happiness quotient, a master degree thesis in nursing in gerontology in Pennsylvania, a Australian human nutrition program study, a Texas university pharmacy student researching instruments that measure quality of life issues, and an Idaho doctoral student working on her dissertation. Other disciplines and locations included Occupational Therapy and Psychology in the Philippines, Philosophy in Australia, Economics in Germany, Epidemiology in France, and Psychology in Singapore and many others.

The interest and importance of the research topic was observed in the 1950s and remained in the 1980s as judged by the opening citations from the developers of the original LSIA. It has been affirmed by Barrett and Murk's experience with the LSITA. The feedback from the researchers identified the need for a briefer version of the instrument and affirmed the need for a reliable measure of successful aging as well as for the improved dissemination of the instrument. This research report will detail the extraction of a shorter but still highly reliable and valid instrument that will measure the construct of successful aging reflecting the theoretical framework developed by Neugarten and her colleagues. The new instrument and its statistical properties and scoring will be included in this report.

Successful Aging and The Third Age

The successful aging theoretical framework, validated in the LSITA development project, identified the following five factors as contributing to successful aging or life satisfaction:

1. Zest vs. apathy. The first rating scale, **zest vs. apathy**, relates to an enthusiasm of response to life in general and was not related to any specific type of activity, such as social or intellectual engagements. A subject who was enthusiastic about sitting home reading was scored as high as an energetic person was on this scale. Physical energy as well as intellectual energy and other highly involved pursuits contributed to a high score.
2. Resolution and fortitude. The **resolution and fortitude** scale measures the respondents' active acceptance of personal responsibility for their lives rather than passively accepting or condoning what has happened to them. Erikson's integrity is similar in conceptualization and relates to the meaningfulness of life and the lack of fear of death. Either taking too much self-blame or placing too much responsibility on others or the world in general would result in a low score on this component.
3. Congruence between desired and achieved goals. The third contributor to Neugarten's concept of life satisfaction is the perception of **congruence between desired and achieved goals**. The relative difference between desired and achieved goals caused one to be satisfied or dissatisfied with life in this rating.
4. Self-concept. A comprehensive assessment of **self-concept** in all of the dimensions including emotional, physical, and intellectual was used in establishing this score. This factor is based on one's present emotional, physical, and intellectual dimensions. Persons who do not feel old but are concerned with their appearance and judge themselves to be wise and competent tend to rate themselves higher on this factor. Past successful living may contribute to this component but only indirectly. Someone who thinks that the best is behind them and that

they are not worthwhile will tend to score lower on the self-concept.

5. Mood tone. The final factor, **mood tone**, relates to optimism and happiness and other positive affective responses. Depression, sadness loneliness, irritability, and pessimism are feelings that would result in very low scores.

Life satisfaction was selected as term coming closest to representing all five components in lieu of such constructs as adjustment, morale, and psychological well-being (Neugarten et al., 1961).

The construct of successful aging or life satisfaction has been conceived as more abiding and resilient than happiness which has been measured in the Satisfaction With Life Scale (SWLS; Diener, Emmons, Larsen, & Griffin, 1985; Diener, Scollon, & Lucas, 2003).

Life Satisfaction is a subjective, open measure of human welfare. Subjective because in surveys people are simply asked whether they are satisfied with their life as a whole and open because researchers do not pre-define the components of social welfare—it is up to each individual respondent to judge whether they are satisfied (Donovan & Halpern, 2002, pp. 6-7).

Assessing successful aging is more complex than just measuring happiness but happiness with the present life state is an important contributor in LSR and LSI-A (Neugarten et al., 1961). And the group targeted for the development of the original LSI-A was individuals over the age of 55, entering or into the Third Age of their lives.

The definition of a phase of life called the third age, starts with denoting its chronological beginning. Sadler (2000) gives his beginning age definition as forty in the title of his book. Weiss and Bass (2002) state that “the life phase in which there is no longer employment and childraising to commandeer time, and before morbidity enters to limit activity and mortality brings everything to a close, has been called the third age” (p. 3). Fifty years old as an approximate age for the beginning of the third age, the result of the extra time that has been added unto the average life span since the early 1900’s, seemed a rational compromise for the purposes of this study (Freedman, 1999). Moreover, Neugarten and her colleagues designed the LSI-A for adults over the age of 50 (Neugarten et al., 1961).

According to the Australian Association of Adult and Community Education, there are characteristics that can be used to identify when the Third age begins for an individual. The authors base their definition of the 1986 work of Peter Laslett.

The concept of the ‘third age’ is a socio-cultural concept with obvious biological and demographic underpinnings. . . . In Laslett’s most recent formulation the life course is divided into four ages:

A **first** age of natality, childhood, socialization and education; an age of nearly total dependency, at least until the latter part of it.

A **second** age of maturity, earning, career pursuit and advancement; of family formation, procreation, maintenance and socialization of off-spring; of responsibility for the dependent old and young; of membership of productive organizations; of instituting and maintaining such bodies, but also submission to their authority; of self fulfillment as far as productive imperatives allow; of preparation for full self-realization in due course.

A **third** age of autonomy in self-fulfillment; of release from the trammels of the second age; of pursuit of aims freely chosen either on one’s own or in collaboration with others in the third age; an age particularly of cultural activity and satisfaction, to be described as the **Crown of Life** (Hurworth & Crombie, 1995, pp. 4-5).

This definition relied on the activities that occur in the individual’s life to determine what stage they currently enjoy. And, in the definition of Laslett’s course or map of life, the **fourth**

age is the inevitable final part of life that we all have to experience – death, which may be preceded by dependency and decrepitude (Hurworth & Crombie, 1995).

LSITA and LSITA-SF

The 35 item LSITA, as reported at the 2006 Midwest Research-to-Practice Conference in Adult, Continuing, and Community Education, was designed to measure the construct of Life Satisfaction as well as the five associated components in a reliable and valid manner. The instrument development process using 654 third age participants was highly successful with a Cronbach α of almost .95 (reliability) and high correlations ($> .70$) to two criteria scales (criteria validity) and an excellent goodness of fit score in the Confirmatory Factor Analysis process (construct validity). The very high reliability of the LSITA makes it useful in group research studies as well as in individual diagnostic applications.

The goals of this research were to use the data gathered in the scale development of the LSITA to extract a briefer instrument that will be highly reliable (Cronbach $\alpha > .90$) and a valid measure of Life Satisfaction. The data included the responses by 654 participants to the 35 item LSITA as well as to two criteria measures: the Satisfaction with Life Scale (SWLS) and the Salamon-Conte Life Satisfaction in the Elderly Scale (SCLSES). The resulting instrument, designated the Life Satisfaction Index for the Third Age—Short Form (LSITA-SF), is a twelve item scale with a reliability of .90 and is highly correlated to the LSITA and the criteria scales. It is therefore an excellent measure of the overall construct of Life Satisfaction. However, it will extract only the life satisfaction construct and cannot be used if the five underlying factors are desired.

Adult, Continuing, Extension and Community Education researchers and practitioners will have an improved tool with which to conduct studies of the effects of their efforts on their participants. The Short Form of the LSITA will increase the ease of obtaining a reliable and valid measure of successful aging. With this high level of reliability, the LSITA-SF will be useful in correlation research and the brevity will improve data collection requirements especially in those members of the target population who are frail. Moreover, its availability through the publication of this conference report will increase the LSITA-SF's dissemination and likelihood of being used. The authors were committed to dissemination of the abbreviated instrument and a scoring guide within this article. Since the LSI-A, the LSITA and therefore the LSITA-SF are in the public domain, this would increase the opportunity for researchers to avail themselves of this valuable resource.

Life Satisfaction Index for the Third Age (LSITA) Scale—Short Form

Directions: Please read each statement on the list and circle the answer that most closely reflects your attitude toward the statement above the responses. There are no right or wrong answers and your opinion on each of the statements is important. Thank you for your confidential participation in this survey.

1. As I grow older, things seem better than I thought they would be.

Strongly Disagree	Disagree	Disagree Somewhat	Agree Somewhat	Agree	Strongly Agree
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2. This is the dreariest time of my life.

	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
3.	I am just as happy as when I was younger.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
4.	I would enjoy my life more if it were not so dull.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
5.	My life could be happier than it is now.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
6.	The things I do are boring or monotonous.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
7.	I expect interesting and pleasant things to happen to me in the future.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
8.	The things I do are as interesting to me as they ever were.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
9.	My life is great.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
10.	Everything is just great.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
11.	As I look back on my life I am well satisfied.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
12.	I enjoy everything that I do.					
	Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree

Scoring for the Life Satisfaction Index for the Third Age Scale – Short Form

For Items 2, 4, 5, and 6, the responses are reversed scored as below:

Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
1	2	3	4	5	6

For all other Items, namely 1, 3, and 7 – 12, the responses are scored as below:

Strongly Disagree	Disagree	Disagree Somewhat	Agree somewhat	Agree	Strongly Agree
6	5	4	3	2	1

Total the scores for the twelve items to establish the Life Satisfaction score. This short version of the Life Satisfaction in the Third Age (LSITA-SF) measures **only** the overall construct of life satisfaction. If the sub-scales of Zest vs. Apathy, Resolution & Fortitude, Congruence of Goals, Self-Concept and Mood Tone are needed by the researcher, the larger LSITA should be

used. Contact Dr. Barrett at andybarrettii@earthlink.net to obtain the LSITA and its scoring matrix.

The mean score for the LSITA-SF on the development group of subjects (N=577) was 51.2 out of a possible high score of 72. The expected mean based on the research indicating an average score for self-reports of happiness of seventy-five percent was 54 which would indicate the possibility of a slightly unsatisfied group. The LSITA-SF had a standard deviation of 8.66 on the development group. Thus a range of expected results on individual assessments would be from 42.5 to 59.9. Scores in this range would be considered as within normal limits for individuals.

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