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Methods of reconstruction of theories of aging in Poland²

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Abstract

The purpose of the article is to present the methods of reconstruction of theories of aging, developed on a different socio-cultural ground, which are introduced to Polish readers. The basis for this analysis is the need to look at the effects of reconstructing the main theoretical perspectives in social gerontology in Poland. The topics discussed in the article seem important because the quality of reception of theories of aging has a significant impact on research. Better quality of theory reconstruction should result in their wider use, both in exploratory and verification studies, for example as a source of hypotheses, research questions, as well as explanation and understanding of the obtained data. The analysis revealed that in most cases the receptions presented in Polish gerontological literature are fragmentary, insufficiently described and their origin is not explained. They often lack critical comments. An analysis method has been proposed to increase the quality of new receptions of aging theories.

Introduction

In social gerontology, progress is measured by theories of aging, which should be treated as a hallmark of the collective competences of a given social group and are the mirror of the state of social development (Muszyński, 2011), they indicate the

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relationship between individuals or aging population and social and economic institutions, both in the context of social stratification and as a factor in equalizing opportunities. They may indicate forces leading to the empowerment or disempowerment (of the population) of old people. Finally, they show the evolution of views on old age and aging (Timoszyk-Tomczak, Bugajska, 2012). They are also the basis for forming social policy, thus influence the development of norms and ways of playing available roles in old age (Bengston, Burgess, & Parrott, 1997; Muszyński, 2016a).

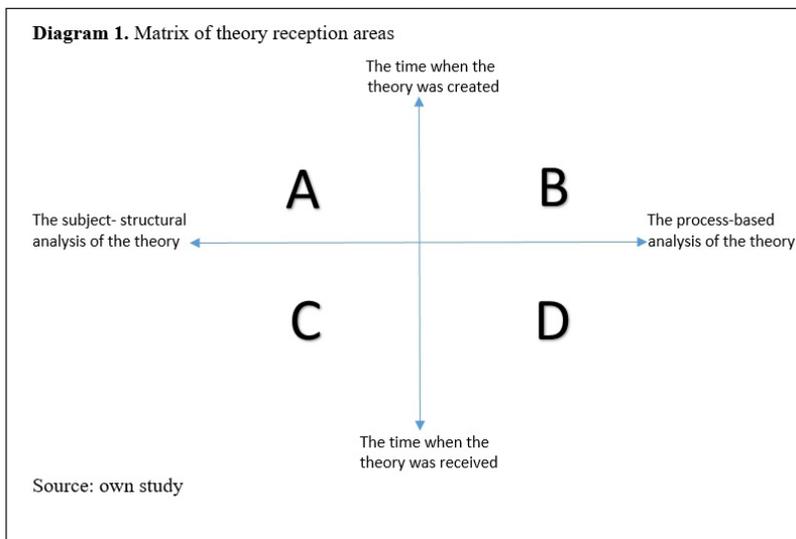
Many scientific publications in the field of social gerontology mention the entire catalog of various theories of aging (Chabior, 2000; Trafaiątek, 2006; Zboina, 2008; Szarota, 2010; Szmaus-Jackowska, 2011; Czekanowski, 2012; Bugajska, 2012; Worach-Kardas, 2015; Wrótniak, 2015; Pikuła, 2015; Konieczna, 2016; Grzelak-Kostulska, 2016; Krzysztofiak, 2016; Kubiak, 2016; Chabior, 2017). It seems that the basis of such presentations is (most often) implicit thesis about the complementary theories that together give a fuller insight into the processes of social aging. What's more, the presentation of the entire theoretical achievements of a given field shows that the presented knowledge is grounded and theoretical. It allows to get acquainted briefly with many theories of aging which show the intellectual richness of the scientific achievements of social gerontology but at the price of necessary shortcuts. A brief overview of different theories of aging can also be found in recognized publications used as academic textbooks (Szatur-Jaworska, Błędowski, & Dziegielewska, 2006; Fabiś, Wawrzyniak, & Chabior, 2015). Recently, there are more and more publications which present the context of the creation of a given theory (Timoszyk-Tomczak & Bugajska, 2012; Seredyńska, 2013) rather than list all more and less known theories of aging or focus on one theoretical perspective that is used to interpret the collected empirical material (Fabiś, 2018).

However, despite these numerous descriptions of theories of aging, there are still few studies in the Polish gerontological literature that exhaustively show the chosen theoretical perspective. The older publications include works by Dorota Techniczek (1968), Jerzy Piotrowski (1973), Maria Susułowska (1975, 1989), Józef Rembowski (1984), Barbara Tryfan (1993), Adam Zych (1995) and Bruno Synak (1999). The newer ones will include works by Jerzy Halicki (2006, 2017), Marek Niezabitowski (2007), Celina Timoszyk-Tomczak and Beata Bugajska (2012), Małgorzata Malec (2012), Danuta Seredyńska (2013), Marcin Muszyński (2016b, 2017 a, b, c), Paweł Brudek (2016) Katarzyna Winiecka and Adam Zych (2017), Celina Timoszyk-Tomczak (2017).

Therefore, the following questions arise: How are theories of aging reconstructed in Poland? and What is the status of their reception?

Answering the first question, it should be pointed out that the reconstruction of a theory of aging can be carried out in two intersecting continuums: on the one hand, it is formed by the subject-structural analysis of the theory vs. the process-based analysis of the theory. On the other hand, the time when the theory was created vs. the time when the theory was received. The subject-structural analysis allows to identify the

characteristics of the theory. It is relatively static and focuses on differences as compared to other theories. The purpose of the process-based analysis is to capture the changes that are taking place within the theory itself and against other theories. The analysis of the time of theory's origin focuses on detecting the conditions characteristic for the period when the theory was formed. Such cognition is static. In turn, the analysis of the reception time of the theory refers to many different ways of recognizing, interpreting, understanding and changing the studied theory, which penetrates and overlap one another. It shows the dynamics of changes that have taken place in theory over time. As a result of this division, four areas are created. The first, marked with the letter A, refers to the reception of the completed theory at the time of its creation (static description). In area B we deal with the description of the genesis of the theory at the time of its creation (dynamic-static description). The area marked as C refers to the reception of one of many modified versions of the theory (static-dynamic description). Whereas area D is a record of the process of changes that took place within the analyzed theory from the beginning (dynamic description).



The above findings help us understand how certain theories of aging are reconstructed in Polish gerontological literature. It seems that the most common analytical approach among Polish researchers is the reception of a completed theory at the time of its creation (A) and the reception of one of many modified versions of the theory (C). Reception of the genesis of the theory at the time of its creation is rarer (B), whereas reception in which the theory is presented with all the changes that have taken place since its creation up to its reception (D) is very rare. Hence a more general conclusion can be drawn that Polish receptions of theories of aging are more static than dynamic. While describing a theory, researchers are more concerned with its structure rather than the process. Take for example two classic theories of aging - activity theory and disengagement theory. The analysis of the original texts on the activity theory written

over several decades reveals that in its assumptions, this theory arises from a functionalist perspective, however, in the 1970s thanks to Bruce W. Lemon, MA Vern Bengtson and James A. Peterson (1972) the activity theory has been reformulated to fit the interactionist paradigm. Polish studies point to other theories, such as the theory of continuity (Synak, 1999) or competence theory (Szarota, 2010; Leszczyńska-Rajchert, 2005), which modify or complement the activity theory. However, it is one thing to begin to develop a given scientific perspective in a place where it could not withstand the strong pressure of criticism and another to show the affinity for other theories that refer to activity but were grounded on different assumptions.

Failure to show the changes that have taken place in the understanding of activity in gerontological theories over several decades has resulted in apparent contradictions in assigning the activity theory to different paradigms. It is no different with the disengagement theory, mistakenly considered outdated. Sharp criticism of structural functionalism has led to abandoning efforts to develop this perspective. The petrified form of disengagement theory is easier to reconstruct and criticize. Due to this, it is one of the best-reconstructed theories of aging (Techniczek, 1968; Niezabitowski, 2007). However, the results of analyzes focusing on the processual aspect of reception indicate a return to interest in disengagement theory among researchers (Achenbaum & Bengtson, 1994). The disengagement phenomenon has been included in one of the theories of aging most established in the gerontological literature, that is, the theory of selective optimization and compensation (SOC) by Paul Baltes (1997). This theory assumes that in the old age the balance between development benefits and losses gets disturbed and weighs towards losses. Therefore, to counteract this, the man responds to the limiting factors which accompany aging by abandoning activities that are less important to him (selection) and focusing on those that are most important at the moment (optimization). These aspects were ignored in Polish receptions.

Theory receptions are never perfect. Each of them is written from some perspective. It has to serve specific purposes. It is important to minimize distortions that cause discrepancies. Finding a balance between the particular methodological rigor, i.e. conducting systematic research according to the adopted procedure (Czakov, 2014), and methodological tolerance (Lakatos, 1970) understood as the attitude of openness towards new ideas, which may be particularly desirable in qualitative research (Muszyński, 2018) should result in better quality reconstructions.

As for the second question, it should be emphasized that although numerous references to various theories of aging in the Polish gerontological literature provide general insight into the main scientific explanations of the phenomenon of old age, the vast majority of the receptions are fragmentary, lacking descriptions and explanations of origins. This is a characteristic feature of many scientific publications that review the state of the theoretical development of social gerontology. There are often no critical comments. Rarely there is an exhaustive description of what given theory claims. Few exceptions only confirm the rule. This has certain consequences. This may prevent other

researchers from using theories of aging as the source of hypotheses, research questions and interpretative framework for the results obtained from empirical research. Descriptions of the presented theories of aging are often limited to two or three sentences, claiming to summarize many years of research or ongoing discussions which often brought surprising results. In research into aging and old age conducted in Poland, the authors often do not reveal their methods of analysis. To conclude this section, we can assume that the quality of reception of theories of aging has a significant impact on the research conducted. Better quality reconstructions of theories, which provide a conceptualization of concepts and operationalization in the form of sample research tools, should result in wider use of these theories, both in exploratory and verification studies.

Genetic structuralism – proposed method of reconstruction of theories of aging

Matthew Miles and Michael Huberman (2000) assume that the attitude which is more appropriate for researchers is the one where they look for their way to solve research problems, instead of adopting predetermined methodological patterns of conduct. They think so because many interesting methods were developed by students or young researchers. Of course, the well-grounded “methodological” knowledge must not be underestimated, which is why specialized studies are a benchmark for making modifications that allow a thorough exploration of issues researchers take interest in. In this article, such a role was played by the project of reconstruction research using genetic structuralism by Wiesław Ciczkowski (1995), which was the inspiration for the following original proposal of theory reconstruction.

Stages of analysis

1. Reading the whole
 - a) “notebook” and research journal, translation
2. Reconstruction of the essence of the theory
 - a) a general outline of the theory,
 - b) analysis of the conceptual framework,
 - c) analysis of scientific statements,
 - d) analysis of the research methodology used,
 - e) stages of development/transformation of the theory – links with other theories.
3. The genesis of the theories analyzed
4. Reception of the theory in Poland

Stage 1 – reading the whole

When starting reconstruction research, one needs first read several times the materials that will be examined. This will allow discovering new relationships and hidden meanings, previously unavailable to the researcher. Reading the literature follows two rules. The first involves reading the text at least three times and noticing associations, observations, questions to the author, as well as answers and polemics (Kenneth, 2005). Notetaking may be useful in the research work. Insights regarding interesting issues can be written in notebooks which also serve as the research journal which allows capturing changes in the researcher's thinking about any interesting issues. The second rule is to use the imagination or the researcher's vision of the social world to understand the studied theory (Mills, 2005). This allows us to "see" between the lines.

Polish gerontologists benefit mostly from the theoretical achievements of the researchers from Anglo-Saxon countries, in particular, Great Britain. Therefore, we should mention the issue of translating foreign texts. Although many theories have already been translated by other researchers and described in many scientific publications, it is worth to refer to sources where possible, because it gives the opportunity to analyze texts in the language in which they were created and come into contact with knowledge in a non-mediated way. This may raise some questions or doubts, sometimes about such elementary matters as authorship, the year of the theory's origin or assigning thereof to a paradigm other than the one known to Polish readers.

If translating, the researcher should be aware of the basic assumption that two different languages are not similar enough to be the representation of the same social reality. The target text is not a mirror image of the source (Korzeniowska & Kuhniewicz 2005). The translation is entangled in the social context in which the reconstruction of the text takes place. It turns out that differences between languages affect the way of thinking. Moreover, random grammatical irregularities determine the way the world is perceived. This agrees with B.L. Whorf's assertion that language as a system (its grammar) is not a passive tool for presenting thoughts – it is itself a factor shaping thoughts, programming and directing individual mental activity, analysis of impressions and active synthesis of thought content (Whorf after: Opara, 2005). A similar analysis was conducted by Kuhn, who argued that: what a person sees depends both on what they are looking at and on what they had learned to see in their previous visual and conceptual experience. In the absence of this experience, we would only notice, as William James said, "a cacophony of sounds and colors" (Kuhn, 1968). Therefore, the source text must first be looked at in terms of the very meaning of the content presented in it, and then the interpretation is given to the text by the translator. It turns out that the meaning of the content contained in the text is not necessarily derived from the text but results from the translator's efforts to construct the meaning, and the way this meaning is constructed depends, among others, on social position, nationality, political affiliation or personal preferences of the translator. Thus, translation is not

a simple reproduction of the meaning conveyed in the source text (Korzeniowska & Kuhiwczak 2005).

This may be the cause of misunderstandings as to the legitimacy of the examples given and ways of understanding theories of aging by new generations of researchers who translate this content from foreign languages. Therefore, one should be careful when studying reconstructed theories, concepts, and ideas.

What is more, processing text, which means translating it from a foreign language, often refers to the existing translations. Searching for well-established knowledge and ways of understanding given concepts translated by other authors is even necessary and expected. This helps determine the best translation and proposes a new one where required. There is also a danger that existing receptions can have a very suggestive impact on the further translations in which content analysis is determined by the previous ways of presenting the topic. That is why we must remember that translating texts is a particularly difficult task in the research process, as it poses several challenges. First of all, a relevant source text must be chosen. One of the criteria is having knowledge of the field, research and theoretical concepts, and terminology used in the text selected for translation. It is very useful to know the previous works of the author. It is also important to answer the question if the translation should be faithful due to the content or the meaning? and how to verify if the translation is adequate? This last question becomes particularly important when the researcher assigns different meanings to texts already translated into the native language and which are part of the gerontological knowledge.

Stage 2 – Reconstruction of the essence of the theory

It should be emphasized here that the described stages of the analysis are not linear and many activities are performed simultaneously. As an example, detailed questions to be asked when reading texts could be used to direct the researcher's attention to specific aspects of a given theory. It is with their help that the proper reconstruction of knowledge can be made. More, with such questions, one selects (evaluates) what is important, less important or unimportant for the theory. The questions asked, as well as an earlier selection of the research material, determine the results of the work. Such a procedure destroys the myth that positive reconstruction is only an uncritical and non-assumptive tool for a theory of aging (Śliwerski, 2004). Although on the one hand, the researcher should be open to new theories, views or concepts to faithfully reflect the intention of the author of a given idea, to see world through the author's eyes, reconstruction, or reception of other people's views, always involves explaining the meaning of the concepts, phenomena or mechanisms. In other words, the researcher builds meaning in the process of understanding. This is a different process from what Schleiermacher presented in the field of hermeneutics. The concept of his hermeneutics referred to understanding at two levels: divinational and comparative

(Ablewicz, 1994). It is this first way that is close to the assumptions of Śliwerski's positive reconstruction which is about empathizing with the studied object.

However, there is no procedure teaching how to empathize with the subject of the research in order to understand it. As Ricoeur argues, (2006) the meaning of the text and the author's intention are two separate things. Thus, if the objective meaning of a text is something other than the author's subjective intention, then it can be constructed in various ways (Ricoeur, 2006). According to Eric Hirsch (after: Ricoeur, 2006), there is no single binding method for guessing or constructing the meaning of a text. In the opinion of this scholar, the act of understanding is initially a brilliant (or failed) guess, and there are no methods for guesswork, there are no rules for creating insights; the methodological activity of interpretation begins when we begin to test and criticize our guesses. By virtue of methodological activity which involves carrying out the so-called discrediting procedure similar to the criterion of Popper's falsification, some interpretations become more likely than others (Hirsch in: Ricoeur, 2006). Returning to the theory reconstruction procedure, one should decide which questions are particularly helpful in understanding the text. During the study, we should ask about the general outline of the theory, or what it concerns. We should stick strictly to what the perspective says. One must not go beyond the boundaries set by the analyzed theory. It is also important to pay attention to the level of analysis, in other words, determine whether the theory refers to micro, mezzo or macro phenomena. It is also important to identify the restrictions imposed by the theory on the phenomenon explained. These are the so-called determinants of theory. Moreover, one should consider the impact of time on the theory. Has the theory been refuted or enriched?

The notion of time in reconstructing theory is important. The methodology of history (Topolski, 1973) comes in useful here, which points to two separate points in time: the time of the theory's origin and reception. In the first case, we are dealing with the identification of the conditions typical for the period when the theory was created. The other case refers to many different interfering and overlapping ways of recognizing, interpreting and understanding the studied theory. Thus, the choice of time perspective leads to different cognitive results. And so, the reconstruction of the theory during its creation leads to the static cognition, while reconstructing the theory during its reception shows the dynamism of changes that have occurred throughout history. According to Sztobryn (2004), the nature of the former is subjective, while the latter is objective. It turns out that reconstruction by the method of genetic structuralism refers to both aspects of time.

The analysis of the conceptual framework is extremely important for theory reconstruction. Therefore, we should ask what main concepts constitute the theory. Concepts are the material from which the theory is built. The definitions together with the terms used in the theory make it special and verifiable. What the researcher should be interested in is the frequency of occurrence of given concepts, because there is a relationship saying that the higher the frequency of their appearance, in theory, the

greater the probability of complex relationships between the analyzed terms. Attention should also be paid to auxiliary concepts without which all argumentation is incomprehensible. The researcher should be particularly interested in how the concepts are defined because in this way their importance is emphasized. It is about their semantic boundaries and the resulting consequences. When talking about the consequences, attention should be focused on the degree of abstractness of the analyzed concepts. The more abstract they are, the bigger the class of phenomena and objects they cover, and consequently, they do not apply only to a few selected cases. Moreover, we should also check their impact on the perception of reality by individuals or a given social group. Finally, we need to examine the relationships between concepts. Sometimes the author of the theory does not point directly to the relationship between the terms that form the conceptual apparatus of a given theory, so we need to pay attention to language expressions that would indicate the existence of such relationships. They are phrases like “strengthens”, “lowers”, “causes consequences,” etc. These relationships can be grouped into positive, negative, linear and additive (Kenneth, 2005). This way of analyzing concepts is similar to one of the five basic methods of the history of philosophy, namely the doxographic method (Kuderowicz, 1978).

Another element that should be carefully looked at are the theorems of theories, which explain trends and regularities in the observed reality. On the other hand, the statements are to explain phenomena according to a uniform principle (Nowak, 2008). Some scientific laws cover the whole of what can be empirically observed, while others limit themselves to explaining small fragments of reality. The mechanisms of aging are expressed primarily in theorems. They create an essential layer of understanding of what the theory presents. The truth of the presented theorems can be proved only by arguments based on the model of deductive or inductive research. The reconstruction of the theory of aging should include the argumentation of the presented statements. Only in this way will the reader have a chance to decide about the validity of the theses cited.

When making the reconstruction, one should also pay attention to the methodology used by the author of the theory. The researcher focuses on methods and definitions. The reconstruction involves studying the previous research on the same subject as well as research works in which the results of tests or theory verification are presented.

The stages of development of a given theory can be looked at in two ways: namely from the perspective of internal changes in a particular theory or from the perspective of other theories arising in a specific space of time, designed to explain and understand the same phenomenon. There are at least two ways to transform a theory: modification and synthesis. They facilitate the development of theory. There are numerous examples of theory modifications. The basic ones include expanding or reducing the meaning of terms. In doing so, the researcher does not agree with the meaning of a given concept presented by his or her predecessors. They are required to understand the original meaning of the concept being studied. This procedure was used, among others, by Emil Durkheim. By broadening the definition of the ritual, he was able to

understand the behavior of Americans during the Independence Day celebrated on July 4th. The second way to transform theory is to synthesize or combine elements from different theories into one. For example, Georg Herbert Mead borrowed the concept of “self” from William James, the “will” from William Wundt and the “looking glass self” from Charles Cooley, creating his original concept he called symbolic interactionism (Kenneth, 2005).

Stage 3 – Origins of the analyzed theories

The third stage of reconstruction research using the genetic structuralism method refers to the sources of transformation of the theory. Referring to the theoretical inspirations of genetic structuralism, there is no doubt that the emerged broader structures, which are the source of the reconstructed theories, must be dynamic to show the course of knowledge development of aging. At the same time, the direction of this development should have the character of progressive changes. In other words, each subsequent structure must be more complex, show more relationships, and reveal a wealth of details that cannot be included in simple empirical generalizations. Only in this way can the evolutionary mechanism of knowledge creation about aging be traced. Two phenomena known in science as positivism and anti-positivist breakthrough can serve as broader structures. They concretize in the structures referred to as modernism, critical theory and postmodernism, that is, contemporary co-existing paradigms. In the specialist literature, this synchronous approach, slightly different in shape, can be found in the works of Egon Guba and Yvonna Lincoln (2000). Regardless of the choice of (names) of structures, it should be remembered that the process of destructurization of pre-existing structures and structuring of new structures should allow us to explain and understand the genesis of the theorization of the phenomenon of aging.

Stage 4 – Reception of theories of aging

Within the literature theory, many methodological approaches are formulated, in which one could examine the reception of the theory of aging in Poland. To put it simply, we can say that the process of reception, on the one hand, involves reading the meanings that are inscribed in the message, and on the other hand is the interpretation of the message (Mrozowski, 2001). By examining the reception of a given text, both the meanings contained in the text and the meanings given to the text by the recipient are examined. There is often a discrepancy between the types of meanings recalled. However, the meaning given to the text is more important than the meaning assigned to it by the author, and so the cognitive effort should focus on the meanings that have been given to the subsequent theories of aging by gerontologists and researchers associated with this discipline.

When analyzing scientific texts, there is some ease in reading meanings, because the style of scientific work is characterized by simplicity, unambiguity, and precision,

unlike the analysis of literary works, which are in principle semantically more open (Eco, Rorty, Culler, & Brooke-Rose, 2008). However, despite the unambiguity of scientific texts and their literal nature, which does not allow for too much interpretative freedom, it is impossible to impose only one method of interpretation on the recipient (Mrozowski, 2001). Therefore, there may be discrepancies in the understanding of reconstructed theories of aging because there are many potential readings.

Reception research in its simplest form consists of collecting and ordering the statements of recipients (Polish researchers) and broadcasters, i.e. the creators of the theory of aging or other authors writing in the language of the origin of the analyzed theory. The next step is an attempt to compare these statements with one another (Wienold, 1986). The benchmark for the conducted comparisons will be the reconstructed theories of aging made by the researcher. Thus, comparative studies will de facto involve comparisons between the meanings attributed by the researcher to theories of aging and meanings given to these theories by other researchers.

Conclusion

Researchers who present their theory of aging reception usually do not reveal what methodology or methods they used. They do not indicate strengths or weaknesses resulting from the adopted interpretive practice. Moreover, there is a lack of theoretical analyzes in Poland that would critically review the achievements of social gerontology and the recent few studies in this field do not compensate for the existing shortcomings. This shortage of publications resulting from theoretical research, which aims to create theoretical and methodological foundations related to the phenomenon of old age and aging, results in the lack of a broad perspective enabling reliable assessment of the theoretical nature of social gerontology. Thus, the method of reconstruction of the theory of aging presented in the article may be an interesting proposition for conducting theoretical research in the field of social gerontology.

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