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Introduction to the Special Issue on Theorizing in Family Gerontology:

Beyond Broad Strokes to the Finer Details

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Introduction to the Special Issue on Theorizing in Family Gerontology: Beyond Broad Strokes to the Finer Details

The rapid population aging occurring around the world has spurred increasing interest in the field of *gerontology,* which is the study of both individual (age 40 and older) and population aging. This demographic shift has significant policy and resource implications, many of which have direct effects on families. *Family gerontology* is a type of social gerontology (Roberto, Blieszner, & Allen, 2006) that focuses on this critical intersection between families and aging. People typically age in families, and families themselves age over time. Such development brings about different issues and dynamics that can be the focus of study, yet this vital topic has represented a relatively small proportion of the work published in the family science field. For example, the last special issue in a family science journal on the topic of family gerontology was in *Family Relations* over a decade ago (2006). At that time, the editors highlighted the need for an enhanced understanding of the "diversity of issues, needs, and relationships within older families" (Roberto et al., 2006, p. 515), as the existing work provided only a thumbnail sketch of the many experiences of families later in life, often using broad strokes to explain relatively complex phenomenon.

What motivated the current special issue was our conjecture that the root of this more generalized "broad strokes" approach was the oft-lamented lack of theorizing in family gerontology (Roberto et al., 2006) and social gerontology (Bengtson, Burgess, & Parrott, 1997). Although certain foundational theories were being used (e.g., life course theory, stress theory; Roberto et al., 2006), they may not be able to account fully for recent advances in family science theory that likely have implications for the current status and functioning of contemporary later-life families. Thus, to ensure continued progress in the field of family gerontology, we sought to answer two questions with the special issue. First, can early foundational theories still be applied to contemporary aging families, and if so, which ones, and in what ways? Second, have new theories emerged or increased in their usage in the past decade that provide more insight into the "finer details" of family life in older adulthood, and if so, which ones? As can be seen in this collection of eight articles, the answer to both of these questions is a resounding "yes."

First, foundational theories are being applied to contemporary families in a variety of ways. At the broad level, for example, an examination of theories used in the past decade in family gerontology research shows that the life course perspective and stress and coping theory are the top two theories being used (Humble, Seidel, Yorgason, & Redden, 2020). Further, the "Original Voices" paper by Fuller, Ajrouch, and Antonucci (2020) in this issue shows how the social convoy model continues to be of relevance for family scholars. Monk, Proulx, Marini, and Fiori's (2020) work on aging veterans extends the use of the convoy model to distinct aging populations. At the same time, the scholars in this special issue draw attention to new theories that have emerged to account for the diversity of aging families' experiences in the 21st century (e.g., Thomeer, Umberson, and Reczek's Gender-as-Relational Approach; Lin and Brown's Convalescence Model). Indeed, there is much to celebrate in terms of progress in the field of family gerontology, which is consistent with the literature reviews from Humble et al. (2020) and Allen and Lavender-Stott (2020). Helping to maintain this momentum are corresponding methodological advances, from Connidis (2020) expanding our understanding of sampling by asking who counts in family gerontology to O'Neal, Wickrama, and Lee (2020) demonstrating how scholars can build theoretical complexity into analytic models. Thus, across these eight articles, we feel confident in asserting that the finer details of family life in older adulthood are not only being attended to, but as these details are revealed, they are also helping us identify where family scholars should go from here. To facilitate scholars moving in these new directions, we present five themes that together encapsulate the articles in this special issue and highlight throughout what is known and what remains to be discovered. These themes relate to the (a) diversity of family and relationship configurations found later in life, (b) importance of historical timing, (c) level at which theorizing takes place, (d) relationship between theory and methodology, and (e) influence that theorizing can have on practice and policy.

A Focus on Inclusion

Our first theme from this set of papers—and the one that perhaps most bolsters our confidence for the future of family gerontology—is the considerable focus on *inclusion*. As so deftly introduced by Connidis (2020), there are multiple ways to even answer this question of who matters in family gerontology, from who is counted to who is seen as counted to who can be counted on. By expanding our understanding to these multiple levels, it is clear how often family scholars have relied solely on the first level—determining for ourselves who should be counted, and not always considering the implications of our decision to do so (e.g., conferring societal benefits). These sampling decisions are further challenged by the work of Thomeer and colleagues (2020), who show that a historical exclusionary focus on cisgender, heterosexual couples has limited our understanding of gender. For example, re-evaluating our assumptions about gender forces us as family scholars to acknowledge that much of what are thought of as individual or set characteristics may in fact be situationally determined (e.g., Mischel, 1968). Moreover, given the marginalization of lesbian, gay, bisexual, transgender, and queer (LGBTQ) older adults documented by Allen and Lavender-Stott (2020), it is abundantly clear that such decisions about who is included in our studies signals to audiences who scholars think merits not only our attention, but our resources as well.

Such oversights are costly, as demonstrated by the work of Monk and colleagues (2020) and Fuller and colleagues (2020) on the social convoy model. In the former, Monk et al. show how aging veterans seek support from fellow veterans, who may be more likely than non-veterans to understand their experiences of trauma. Focusing solely on family members as sources of support would obscure these vital connections that may become more important later in life, as individuals have difficulty connecting to those who did not have a shared history to draw upon. Moreover, Fuller and colleagues (2020) draw our attention to the importance of thinking beyond individuals' central ties to how their peripheral ties may be benefit them. Using a timely example of the COVID-19 pandemic, it becomes clear that broadening our understanding of our social networks to include acquaintances and neighbors does not diminish the importance of families. Rather, it acknowledges that family connections at times need to be bolstered and complemented by other ties. Moving forward, it is imperative that family scholars continue to push themselves to consider who counts and to justify how such decisions are made. To help accomplish this goal, an iterative approach may be required, whereby participants are empowered to decide for themselves who matters. We acknowledge that allowing for such elasticity in our designations of who counts may introduce considerable – albeit justified – noise into our studies, but we argue that such a step is necessary if we wish to continue our forward momentum as a field.

The Importance of Historical Timing

The call for a more dynamic approach to our studies dovetails beautifully with the second theme to emerge from this special issue, namely *the importance of historical timing*. Many of the theories and models here were developed and refined in response to sociohistorical trends. Indeed, as Connidis (2020) points out and similar to how we began our introduction, the increased life expectancy enjoyed by many has enabled greater opportunities for connections with others and has lengthened the duration of many of these relationships. O'Neal and colleagues (2020) show how this increased longevity plays out within the couple context, demonstrating that our aging is not an individual phenomenon but one embedded in our close relationships. However, as Lin and Brown (2020) indicate, not all older adults are able to enjoy longer-term relationships. With the rise of the grey divorce, recent cohorts of older adults are entering their later years with an increasingly complex marital history and the extent to which this poses long-term challenges to their health and well-being is only beginning to be understood. Lin and Brown suggest family scholars must revisit previous assumptions about how older adults would handle such changes in light of these new sociodemographic trends, as the number of older adults experiencing losses continues to grow.

Underscoring the importance of the sociohistorical context for the beginning of relationships as well as for their endings, several authors draw our attention to the importance of dramatic sociohistorical changes that have enabled individuals to formalize their unions. For example, both Allen and Lavender-Stott (2020) and Thomeer and colleagues (2020) show how the legalization of same-sex marriage has altered the relationship horizons of LGBTQ older adults. Moreover, the increasing acceptance of same-sex couples means that newer cohorts may be able to enter their later years with qualitatively different exposure to stress than previous cohorts. Allen and Lavender-Stott (2020) caution us from being overly optimistic, however, as there remains a tension between marginalization and resilience, with new forms of discrimination and backlash often emerging to mitigate the progress that is made. Their caution underscores the need for theories that account for the dynamic nature of human lives, as the opportunities and constraints facing individuals and their families are ever-changing in response to broader sociohistorical trends. However, it is important to note that requiring theories to contain this wider lens may restrict us from utilizing certain theories that are more targeted to understanding narrower phenomenon and experiences. Family scholars must therefore decide for themselves whether such a trade-off is reasonable, as the advantages of having a finer-tuned theory may or may not outweigh the disadvantages of being unresponsive to emerging sociodemographic trends.

What Level Should Theories Be?

The third theme in the special issue— *at what level should theories be?*—suggests that scholars differ on how encompassing theories used to study later-life families should be. There are two ways to look at the level of coverage: (a) micro- versus macro, and (b) general versus middle-range theories. As documented in Humble and colleagues' (2020) content analysis, scholars appear to more often use micro-level theories that focus narrowly on individual or family dynamics (e.g., socioemotional selectivity theory, intergenerational solidarity theory) than macro-level theories, which connect these family dynamics to broader societal norms and issues (e.g., intergenerational ambivalence, feminist theory). They also note the high number of empirical studies using middle-range theories (e.g., cumulative inequality theory, marital horizon theory), which focus on unique family circumstances rather than general theories that can be applied across a range of experiences (Fine & Fincham, 2013). In light of this second finding, they suggest that more attention be given to these middle-range theories, particularly in the teaching of family theories.

Allen and Lavender-Stott (2020) also find a similar pattern of infrequent use of major theoretical frameworks in the study of LGBTQ families. In contrast to Humble et al. (2020), however, Allen and Lavender-Stott argue that turning to major family theoretical frameworks, which tend to be broader in focus, would bolster the foundation of current theories. For example, they suggest that an ecological perspective could provide invaluable insight into how family processes later in life are affected by issues such as healthcare, housing, and public policies. Their call for this level of theorizing would likely find an appreciative audience in the authors of the articles in the special issue, given how often the authors here drew upon macro-level theories, such as Elder's (1998) life course theory (e.g., O'Neal et al., 2020, Monk et al., 2020). Yet, it is important to recognize, as Allen and Lavender-Stott (2020) do, that scholars' decisions about which level of theory to utilize must go hand-in-hand with decisions about which methods to employ, as disconnects between the two ensure that neither can make discernible progress.

The Symbiotic Relationship Between Theory and Methods

The scholars in this special issue clearly recognize *the symbiotic relationship between theory and methods*, marking it as our fourth theme. The advances seen here in theorizing about family gerontology would be rendered moot if there were not corresponding developments in methodologies. Otherwise, scholars run the risk of theorizing for its own sake rather than for the generation and refinement of science. Perhaps best exemplifying how interdependent theory and methods are is the work of O'Neal and colleagues (2020), which illustrates the need for statistical models that can account for the complexity of human experience (e.g., cross-lagged autoregressive modeling, latent growth curve modeling). They demonstrate that if scholars acknowledge the multiple systems in which individuals are developing and aging (e.g., dyads, families, society), models are needed that can fully account for this nestedness. Moreover, Lin and Brown (2020) persuasively argue that data are needed that enable an examination of development over extended periods of time, as that will allow scholars to tease apart short- and longer-term outcomes. Without such longitudinal panel data, their work shows that family scholars may mischaracterize the experiences of families in later life, perhaps erroneously concluding, for example, that older adults whose long-term romantic relationships end (via widowhood or divorce) are permanently disadvantaged when in fact they appear to be engaging in a protracted period of recovery.

Although these advanced statistical techniques represent tremendous progress in our ability to test the macro-level theories, a strength of the special issue is that it also highlights the comparable value of qualitative inquiries. Allen and Lavender-Stott (2020) argue that qualitative studies often represented deliberate efforts to connect theory with method, and their content analysis certainly indicates that the recent studies employing qualitative methods have helped family scholars make remarkable strides in their theorizing about family gerontology. Connidis (2020) in fact proposes that qualitative explorations should be the first step in testing theories, as they can better help us determine who and what matters before researchers step in to make that call. Embracing the advantages of both qualitative and quantitative approaches, Thomeer and colleagues (2020) show that a mixed-methods approach may yield a more comprehensive picture of later-life families. Thus, consistent with Silverstein and Giarrusso (2010), we argue that both quantitative and qualitative approaches to studying families are necessary to move the field forward. Given that Humble and colleagues (2020) convincingly argue that *how* later-life families are studied likely shapes the development and refinement of a theory, it is clear that more attention needs to be paid to the decisions scholars make about which methodological approach to take.

Monk and colleagues' (2020) work on the social convoy model, however, brings up an issue that affects both methodological approaches, namely, to what extent should theories be leading methodological efforts? As seen in the special issue, the social convoy model provides an excellent test of this question. The social convoy model is a broad theory, and one that has challenged researchers to fully capture aging individuals' networks in a dynamic fashion. Demonstrating that assessment of complex models is indeed possible, Fuller and colleagues (2020) take an interdisciplinary approach to solve this problem by directing our attention to sociocentric network analysis, which is an analytical approach yet to be widely adapted by family scholars. Such techniques warrant further consideration in light of their ability to help address our earlier points about considering who counts in our studies of later-life families. Considering networks in their entirety helps identify the multiple points of entry available for those wishing to improve the lives of older individuals and their families.

Theory as Guiding Policy and Practice Recommendations

Such a consideration brings us to our final theme, namely the utility of theory for guiding *policy and practice recommendations*. With a rapidly aging population and a healthcare system ill-equipped to provide comprehensive care to individuals living many years longer than their predecessors, families are increasingly being relied upon for providing care for their aging relatives. Although this increased reliance on family care has been framed almost exclusively as a challenge, the scholars here reveal that older adults have more resources than previously assumed. For example, Connidis (2020) draws attention to thinking beyond traditional notions of family to acknowledge all the ties that make up the fabric of older adults' lives and thus can be thought of as crucial sources of support for individuals later in life. The work from Monk and colleagues (2020) and Fuller and colleagues (2020) also demonstrates that the assumption that individuals rely exclusively on their families for care is shortsighted, as older adults often turn to more peripheral ties when in need.

Moreover, these articles also challenge the assumption that the entire older adult population can be painted with the same broad strokes by characterizing them all as uniformly vulnerable because of their age. Instead, scholars such as Lin and Brown (2020) identify who might actually be at risk later in life and the extent to which these individuals require prolonged care and attention as a result of their marital losses. Similarly, Monk and colleagues (2020) show that the enduring trauma of war may place aging veterans at risk, but they also show that veterans have many resources that they can turn to if provided the proper access (e.g., access to technology – also discussed as key by Fuller and colleagues, 2020). Thus, the articles in the special issue demonstrate that family scholars need to utilize a balanced perspective when making recommendations to both policymakers and practitioners—a perspective that not only helps identify who is in need but also offers potential avenues through which to bolster their health and well-being.

In conclusion, it is our hope that readers of this special issue are able to appreciate the considerable progress that has been made in the field of family gerontology over the past decade—progress that has been driven in large part by the theories contained here. In compiling this set of extraordinary papers, we see how attending to the finer details of family life in older adulthood while not losing sight of the larger sociohistorical picture enables us to better describe, explain, and predict "the diversity of issues, needs, and relationships within older families" (Roberto et al., 2006, p. 515). In so doing, family scholars stand poised to play an invaluable role in the lives of this vibrant, growing population.

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