

Concepts and Criteria for Functional Age

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Introduction

The purpose of this paper will be to examine the manner in which behavioral scientists might address definitions of aging which depart from chronological age. In order to do so, we first must be reassured that the concept of functional age is not a second concern will be to identify the type of data base which is needed for the development of age functions and to consider what kind of data are appropriate for the different conceptualizations of functional age. A third major purpose of this paper will be to distinguish between functional age as a general yardstick applicable to basic psychophysiological mechanisms (for example, timing mechanisms involved in the feedback loop between cardiac and cortical functions governing behavior or efficiency of movement) and as a specific social construct (for example, the functional age of an individual in terms of social skills and behavior). In the first instance we would, of course, be concerned with CNS and CNS integrity as they affect behavior, in the latter instance our concern is with the measurement of behavioral competence in specific situations in individuals having specified characteristics.

Some Historical Notes

Although the term functional age has entered common usage only recently, the concept should be used to describe the development of biological age scales was first systematically introduced some time ago by Birren (1959). He suggested that the distinction between pathology and normal aging would require the development of indices which describe man's development in terms of biological, social and psychological ages. In the area of biological ages, a suggested criterion which received early attention was the prediction of error in predicting residual life-span of individuals over the use of chronological age alone (e.g. Templein, 1959; Jalaravisto, Lindquist & Hakonen, 1964).

While longevity may be a rather useful and reliable criterion for biological age functions, it is difficult to think of similar criteria in the psychological or sociological domains. Birren (1959) consequently suggested that psychological age might be an index which summarizes the position of an individual in multi-dimensional space. He expressed the hope that such an index might also serve as an indicator of the individual's capacity to adapt to new environments or to modify his environment in a mutually favorable way. He first presented this concept in a paper on "Ages of the Individual" (1962) and then in a more detailed paper on "Ages of the Individual: A Study of Both Physiological and Psychological Indicators which might enter into a functional aging index." Of particular importance for our present concern, is their conclusion that "variation among individuals increases as the age of people studied increases" and that "aging does not appear to be a unitary process (Heron & Chown, 1967, p. 137)." These authors consequently urge that functions which are of interest in their own right ought to be studied in relation to age, and functional age be defined in terms of such specific functions.

A alternate point of view was taken by Dirksen and his colleagues (1972) who selected a set of eight variables as indicators of functional age. The intent here was to develop a composite index of functional age to replace chronological age. To accomplish this objective variables were selected which showed a linear relation with chronological age (quite successfully so as indicated by a correlation of .87 with chronological age). Implicit in this approach is the assumption of a decreasement model of normal aging, an assumption which has recently

Paper presented at a Conference on
"Aging: A Challenge for Science and Social Policy"
Institut de la Vie
Vichy, France, April 24-30, 1977

tion of physiological age functions, but is more economical, and thus a good approximation of the cohort-sequential approach for psychological data. It may be the design of choice if the theoretical age function is presumed to fit a decrement with compensation model.

Cross-sectional Data Bases. Such plans involve the examination of any rectangular set of samples where all cohorts are examined at the same measurement point; for example, cells of 45, 46 and 47 in Figure 1. This approach permits segregating birth cohort differences from secular trends and in the repeated measurement cases all inter-individual differences are functional data bases of course. An inter-individual difference model is essentially non-developmental. It may be of considerable interest, however, for those behavioral variables where we are concerned more with obsolescence than with age decrement.

It should be noted here that data collected in a minimum of three or more longitudinal or cross-sectional sequences in a minimum of three (or more) functional or chronological approaches for purposes of model testing (Schale & Baltes, 1975).

Relation Between Models and Data Bases

We can now return to a closer examination of the different functional age models, and the same time noting will need to identify for each model the specific meaning a functioning age index would attain in relation to the reference population chosen under the particular model.

Life expectancy model. This model assumes that there is a set of parameters which are linearly related to longevity, so to find the best fit we would simply need to estimate the regression coefficients for longitudinal chronological age and from that point in life at which all parameters thought to have predictive value could be assessed, until that point where all members of the panel had died. However, such a process, time-consuming as it would be, unless solely demographic variables were considered so that a retrospective study could be conducted, would not give us generalizable data without making the strong assumption that the process of aging is the same for all members of the cohort. The cohort-sequential (longitudinal sequence) approach would therefore be more desirable. As heterogeneous a population as possible should be sampled to maximize the explanatory of subtle relationships with life expectancy. Having obtained the appropriate regression equations we would then estimate the functional age expectation relation to a given individual and report his or her functional and chronological age would be obtained by a formula such as:

FA 1 = CA + F - A (1)

where FA₁ = functional age, CA = chronological age, F = estimated maximum age to be attained, and A = actual maximum age. Such an index would be useful for insurance schemes in that it would yield a value which would place all individuals in the same relative position with regard to their individual life expectancy. This index, of course, would tell us nothing about the functional capacity of the individual, and thus would not be helpful for issues of retirement and the like.

Residual life expectancy. In contrast to the simple life expectancy model, here we would begin with samples at many ages to be followed to their demise. Here is, of course, a natural illustration where several cohorts would have to be observed simultaneously over time

(or retrospectively for demographic variables). Complications arise, however, in the case of secular trends. If we assume constant declines in the time-sequential effects of such secular trends, then the functional age would be similar to that given for the simple life-expectancy model. The regression equations, however, would be specific to each age level at which prediction of residual life expectancy is made.

Functional age for the second model might be indicated in relation to the population average by the formula:

FA 2 = CA + RA - RF (2)

where RA = residual years remaining on actuarial basis, RF = functional estimate of residual years, and other notation is as before.

The second model may be more powerful in that it would be more realistic in the measurement of an individual's state at a given chronological age to residual life expectancy, rather than to absolute life expectancy regardless of the age at which predictors are measured.

It would be possible to combine methods one and two, given proper data bases, to yield a functional age of an individual, account both for individual differences in life expectancy (perhaps genetically determined) and residual life expectancy (overdetermined by time-dependent life events). The functional age index here might have the form:

FA 2a = FA 1 + RA - RF or CA + F - A + RA - RF (3)

Behavioral Functions. This is the most commonly used model reported in the literature such as that of Dirken (1972) and the Boston Normative Aging Study (Ball, Rose & Damon, 1972). Although quite appealing, it is a most insidious decrement model of human aging, and requires the irreversible decrement model of human aging, and requires the search for age differences that decline while ignoring those which show different patterns of decline or which are based upon cross-cohort rather than age functions, and may thus be quite irrelevant to the issue of functional age. In principle, the age function approach requires a cataloging of the entire domain of human capacity and performance, with subsequent factors of cluster analysis (e.g. Clark, 1960) to discover those clusters which have similar age functions, that is, to discover those clusters which would require a similar rather than differentially falling about level of decline. It would expect that while there might be a single optimal fit for any cluster, the joint assessment of all, accounting for most of the individual differences in performance and capacity, is likely to be non-linear in nature, and would thus violate the model.

If a representative set of functions could be found then functional age could be defined as the regression of their linear combination upon chronological age. Again keep in mind that the resulting index would be most heavily weighted for those components which show decrement and would have the same questionable status as the mental age (MA) concept in the measurement of intelligence that is, it would be an elegant exercise in fudging numbers (Schale & Baltes, 1975; Schale, 1976).

Functional Profile. A much more reasonable approach to the fitting of linear functions to age changes in human performance is presented by the concept of a functional profile advocated by Heron

and Chown (1969). Here it is recognized that a single index will not be very useful because of its limited external validity and moreover because the slopes of various age functions are likely to differ markedly. Some basic flaws remain, however. The functional profile as well as the individual age functions (that is prediction of individual performance) are not clearly defined. It is not clear what is meant by "adequate performance in certain life situations". Once again longitudinal sequences are needed to describe functions adequately, although cross-sectional sequences might serve as first approximations.

Optimal level. A somewhat different approach to functional age would be the definition of optimal levels for a given function. Such levels might be defined depending upon the life stage of the individual as well as the particular historical point in time. Imagine now a given variable at a particular historical point in time. It would be possible to describe it as a proportion of optimal level. Such proportions could be repressed upon chronological age or birth cohort to determine linear functions. Ideally, however, assessments of proportion of optimal level could be related directly to criterion situations. Note that the concept of optimal level would permit age functions which are stable or incremental as well as those which decline (cf. Welford, 1958, and Greenberg, 1977), on performance change in production (the jobs), indeed, if we assume that much of the variation in worker adult function is likely to be determined by inter-generational differences and the concept of functional age might well be better off to switch from the concept of functional age to a more functional level. Note that the cross-sectional method would be most useful to collect functional level data once we move away from the concept that age is the critical variable in accounting for adult behavior change.

Functional level. In this model would be described as the proportion of optimal level or in the form of a functional quotient (FQ) which would be defined as the ratio of observed performance to that proportion of optimal performance which is considered to be normal. The proportion of average adequacy with respect to the criterion variable would be that FQ performance and these could be standardized across variables so that FQ profiles could be constructed with respect to all functions of interest. Note that the FQ concept is age neutral. Any normative data collected by age would be purely cohort-specific, and while they would characterize age differences in functional performance at a particular point in time, would have no relevance for the determination of age changes within individuals.

Plasticity level. If one were to consider an age decrement with compensation model, it will not suffice to provide an estimate of the individual's functional level of performance, but one must further consider to what extent that level can be modified by suitable intervention. We are here considering the degree of plasticity of adult behavior, which becomes quite critical when we assume that many of the disadvantages of the elderly may not be accountable by physiological deterioration, but rather must be attributed to the lack of use, failure to acquire critical skills, or a decline in many of the performance. Young adults are presumed to be at an advantage in many of the performance, and older adults are presumed to be at a disadvantage in many of the performance. It would seem quite reasonable to use Robertson (1977; Welford 1977). It would seem quite reasonable to use performance functions. If decrements in age changes are fairly limited, and differences in performance between young and old are predominantly a function of obsolescence rather than decrement on critical behavior, it may be more important to know the capability of individuals to learn new or relearn old skills, than to worry about a particular age-related decline. It is in an area where cross-sectional studies can make contributions particularly when strengthened by sequential cross-sectional designs.

Functional age expressed as plasticity level may require indices which consider learning both in absolute terms of material acquired as well as in terms of proportion of base performance level. Individually we can consider the degree to which age functions may be quite irrelevant and that we ought to consider the age functions may be quite irrelevant and individual differences and intra-individual differences in performance as a function of course, be time-dependent but we ought to begin at least with an age-neutral stance.

Criteria for the Content of Age Functions

We must now ask whether we wish to construct measurement batteries which probe general classes of the relative state of the individual or whether we wish to probe specific classes of performance. The first question is concerned with the issue that a minimal relative level of certain basic psycho-physiological functions may be required before adequate performance may be possible in any situation of social significance. But such necessary level of function may not be sufficient to predict adequate performance in specific situations. We will therefore next consider what seem to be the most reasonable approaches to defining classes of variables that might have the most significant relationship to performance. We will then end our discussion with a description of the possible approaches to the definition of variables which are "sufficient" to deal with specific classes of situations in which competent functioning is required.

Classes of Variables Suitable for Generalized Functions. Physiological or, more specifically, nervous system integrity is assumed to be related to behavioral competence and some data to that effect are available, even though correlations between measures of the two domains are far from perfect. Thus, numerous older persons are found to have a variety of age-related changes in spite of their serious physiological stress (e.g., cardiovascular, respiratory, and renal) behavioral deterioration with little identifiable physiological pathology. It is important, therefore, to look beyond chronological age differences or changes for a given measure to seek the basic mechanisms by which behavior and physiology influence each other. When such mechanisms are understood, a measure of one should allow relative or general information from the point of view of physiological systems or behavioral functions, we currently have gaps in our understanding of behavioral functions, we do not know enough to suggest some classes of variables which seem worthy of early attention.

Blood pressure provides an illustration of a physiological measure which is thought to be important for functional capacity. It may, however, be important for a variety of reasons depending on the model of functional age held by the examiner. It would be a relevant measure for persons interested in life expectancy (models 1 & 2). The contribution of blood pressure with age has been reported (model 3) though the contribution of age in advanced age has not been fully sorted out. Inclusion in many of the performance, and older adults are presumed to be at an advantage in many of the performance. It would seem quite reasonable to use performance functions. If decrements in age changes are fairly limited, and differences in performance between young and old are predominantly a function of obsolescence rather than decrement on critical behavior, it may be more important to know the capability of individuals to learn new or relearn old skills, than to worry about a particular age-related decline. It is in an area where cross-sectional studies can make contributions particularly when strengthened by sequential cross-sectional designs.

Correlational studies have suggested the relevance of blood pressure measure which is thought to be important for functional capacity. It may, however, be important for a variety of reasons depending on the model of functional age held by the examiner. It would be a relevant measure for persons interested in life expectancy (models 1 & 2). The contribution of blood pressure with age has been reported (model 3) though the contribution of age in advanced age has not been fully sorted out. Inclusion in many of the performance, and older adults are presumed to be at an advantage in many of the performance. It would seem quite reasonable to use performance functions. If decrements in age changes are fairly limited, and differences in performance between young and old are predominantly a function of obsolescence rather than decrement on critical behavior, it may be more important to know the capability of individuals to learn new or relearn old skills, than to worry about a particular age-related decline. It is in an area where cross-sectional studies can make contributions particularly when strengthened by sequential cross-sectional designs.

Via biofeedback of persons suffering from hypertension (Goldman et al., 1975). On the other hand, slightly elevated blood pressure in elderly persons has been correlated with better performance on cognitive tasks (Milde & Eisdorfer, 1977).

If one is interested in why changes in blood pressure affect behavior, and consequently how important blood pressure is as a measure of functional efficiency, one must also explore the various ways that both increased age and a history of elevated blood pressure are associated independently and significantly with average pressure level activity. Stiffer arterial walls resulting in reduced arterial compliance is a homeostatic import because it is the mechanism by which changes in heart rate occur in response to pressure changes. Moreover, changes in baroreceptor sensitivity may also be critical for perceptual-motor functional efficiency.

Blood pressure is simply one example of a physiological measure, the explanation of whose importance to behavior can only be given in its relevance as a measure of functional efficiency. Correlational studies are available to behavior (see Table 1 for examples) and similar explorations of possible mechanisms should be valuable.

Conceptually, one can shift from looking for the behavioral significance of physiological measures as we have done above, to considering what physiological measures are available as persons engage in behavioral tasks. Welford (1977) for example, describes as persons engage in behavioral tasks. Which proposes that CNS processes for perceptual or sensorimotor function choice of response, long-term store and effect or short-term store, gating, arousal systems which enhance or reduce cortical sensitivity via brain stem mechanisms depending on environmental demand characteristics. While this model may suggest a number of studies which could help elucidate some brain mechanisms, measures of nervous system function are not readily available to assess the components. Further, the components enumerated in the model do not depend on processes which are readily translatable into abilities or processes which are readily measurable. We must make decisions on the basis of functional measurements.

We would suggest, then, four classes of processes whose relevance to effective functioning are immediately recognizable and for which at least some central and autonomic measures are now available. The four classes of functions are: orienting processes, control processes, adaptability, and performance. Central and autonomic measures which have been correlated with performance in Table 1 are included in each of these categories are listed in Table 2. Obviously, there is not sufficient time to discuss the relative merits of each measure. It will be noted, however, that the central measures are all words or measures; that is, they record brain activity time-related to stimulus or responses; that is, they rather than utilizing the spontaneously occurring EEG (see Beauchamp, 1977). And, it is generally accepted that evoked potential measures reflect information rather than the content of the information being handled by the organism. The goal of evoked potential measurement would be to assess the relative effectiveness of persons' abilities to deal with and respond to stimulation from the environment.

The role played by the autonomic nervous system in conjunction with central processes is even less well known although investigations are beginning to arise from the research literature. Many investigations are assumed that autonomic participation in behavior serves a fairly utility function such as Houtenberg (1968) and Post (1975) propose that at least two autonomic systems would better account for the data. This position argues

for the existence of one system mediated by the reticular system which maintains arousal level and another system organization for responses, and a second system, mediated by the reticular system, which provides control of responses through incentive-related stimulation. A variety of hypotheses regarding behavior have been generated from this position. The conclusion of the first arousal by the second arousal system (Post, 1975).

An even more highly differentiated notion of arousal involving the contribution of specific autonomic functions to brain function and behavior has been offered by the work of Lacey (1974). Their work suggests that synchrony in the timing of autonomic mechanisms may be necessary between heart rate, baroreceptor activity, and cortical sensitivity in order to achieve behavioral efficiency. When cortical sensitivity in baroreceptor feedback with hypertension or advanced age changes in baroreceptor feedback timing mechanisms might lead to the development of a very useful and highly generalizable measure of optimal functioning.

Classes of Variables Suitable for Specific Situations. When we turn to the question of which may be of more direct concern in industrial (Hofstrand 1973) or other, competency-requiring situations we are faced with the general problem of external validity (see Schale, 1976, for a broader discussion of external validity in the development context). First of all, we must have validity in the development of classes of situations within which older people are understood to display competence. A first attempt in this direction has been reported by Schale (1976) who developed a taxonomy of competence related to four older individuals. This taxonomy classifies situations in terms of four independent dimensions: social character (social or non-social) activity level (high or low), commonality (common or uncommon), prototypic situations for each of the situations. A Q-sort containing five prototypic situations for each of the sixteen possible classes of situations is available to help define the characteristics of a particular orientation situation for the individual whose competence we are interested in.

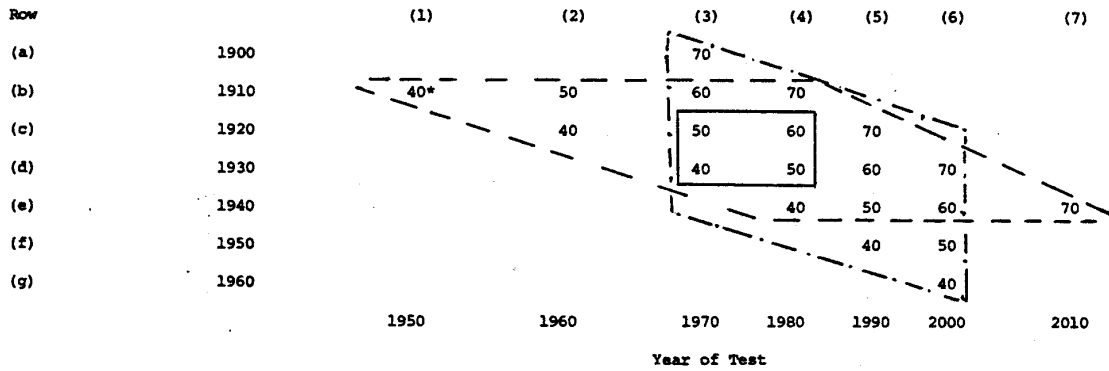
Assuming the availability of a method of identifying the characteristics of the situation to which we wish to predict, we must then select the individual or individuals which are appropriate to the developmental age of the individuals to be tested. That is, we should not expect tasks which have construct validity for young adults to retain such validity for middle-aged or elderly persons. And, we must be sure that our tasks measure the constructs of interest rather than simply being measures of test-taking ability. The latter, rather than incidentally will lead us to approaches see Kraus & Schale, 1976; Simoit 1977). For example of new measures either the large variety of measures which have been used in industrial age studies in industrial contexts (see Kall, 1975) or those that are at issue here is that such measures must be related to do on the task or situation interface before applications of functional age to societal or occupational contexts becomes practicable. We will then be in a position to such as retirement becomes practicable. We will catalog of psychometrically valid measures from which choices can be made of those variables which are optimal for the situation or the determination of age functions with respect to the situation. Whether or not a more generalizable classification of situations is in Horst's (1965) multiple absolute prediction method) might be desirable is an empirical question whose solution would seem far in the future.

Some Concluding Remarks

We have attempted to provide a framework which might be helpful in analyzing some of the presentations which are to follow. In each case we would ask, that the question be raised of what conception of functional age is to be addressed, as to what kind of data are to be collected, and whether the functions to be presented are predicted to be relevant to the general state of the individual or to be made more specific

to a given criterion situation. We would hope that the more physiological-minded will address the former while those interested in social-psychological issues will obviously be concerned with the latter. But the boundaries are not always clear and much exciting work and discoveries lie ahead.

Figure 1. Example of Alternate Data Bases for Functional Age Studies Derived from the General Developmental Model (Schaie, 1965)



*Age of sample at time of test

- Cohort-sequential
- .- Time-sequential
- ___ Cross-sequential

Table 1. Classes of Generalizable Functions

Class of Functions	Possible Measures
1. Orienting functions, including: simple arousal, differential sensitivity to stimulus characteristics such as different intensity levels.	1. Early components of evoked potentials including augmenting-reducing; contingent negative variation (CNV) o-waves; skin conductance responses; heart rate changes.
2. Control functions, including: attentional, inhibitional (dealing with distraction), expectancies, decision-making.	2. Later components of evoked potentials including P300, CNV-E waves; heart rate changes; ANS/CNS synchrony.
3. Adaptability, including: learning and memory.	3. Classical conditioning, habituation, and biofeedback using autonomic and cortical measures.
4. Speed, including reaction time.	4. Evoked potential latency and recovery measures, timing components of ANS/CNS synchrony.

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Footnotes

- 1 Preparation of this paper was facilitated by research grant AG 480-04 and fellowship grant AG 5037-03 from the National Institute of Aging.
- 2 The functions discussed here go beyond and assume prior evaluation and compensation of deficits in basic sensory skills such as vision and audition. The critical importance of these processes for functional efficiency is recognized and their complexity is made abundantly clear by recent work in auditory ear-aided evoked potentials. The physiological mechanisms and functional relationships of these processes are beyond the behavioral functions considered here and the reader is referred to recent reviews by Corso (1977) and Fozard et al (1977).