

**ABSTRACT**

Interest in the nature of successful aging has increased in the last decade in the context of demographic changes and the growing number of old and very old people (P. Baltes & Baltes, 1990; Rowe & Kahn, 1998; Seeman, 1994). One phenomenon still unexplained is the apparent relative stability of subjective well-being in old age despite multiple age-associated losses in central domains of functioning. Regardless of the constraints on resource status inherent with old age, the findings on well-being suggest that positive adaptation to everyday tasks and developmental challenges is possible in the Third and the Fourth Age. The present investigation hypothesized that the optimal utilization of remaining resources is critical to the maintenance of well-being. One way of conceptualizing such optimal resource utilization is encapsulated in the action-theoretic specification of the P. Baltes and Baltes (1990) meta-model of Selective Optimization with Compensation (SOC; Freund & Baltes, 1998). This model outlines four life-management strategies: Elective and loss-based selection describe resource-oriented goal-selection, initiated by individual preferences or by a loss experience. Optimization and compensation indicate optimal resource use by training and refinement of action means or by replacing inefficient or blocked means.

Following this idea, the main purpose of this study was the examination of the dynamic interplay between resources and life-management strategies as determinants of successful aging. Until now, several empirical studies have tried to identify personal characteristics associated with successful aging such as personality traits, health status, or intellectual functioning (e.g., Garfein & Herzog, 1995; Rowe & Kahn, 1997). Research has also explored the cognitive and behavioral strategies that underlie successful aging (P. Baltes, & Baltes, 1990; Brandtstädter & Renner, 1990; Freund & Baltes, 1998; Heckhausen & Schulz, 1995). By combining these prominent approaches, this investigation aimed at clarifying the independent as well as the conjoint effects of resources *and* life-management strategies. More specifically, it was assumed that resources and strategies have positive effects on subjective well-being and that low resources could be buffered by the optimal resource utilization as captured by SOC. Understanding successful aging within the framework of adaptation, aging satisfaction (Lawton, 1975) as one cognitive facet of well-being was used as criterion.

Two studies investigated the relationship between resources, SOC strategies, and aging satisfaction in samples of young-old and old-old adults (70–90 years) assessed in the ALLEE-Project (M. Baltes & Lang, DFG BA 902/11-2). In a representative cross-sectional sample ( $N = 156$ ; *Study 1*), age was negatively associated with resource status (i.e., demographic, cognitive, health, social network) and resource status was positively related to subjective

well-being. At the same time, the reported use of life-management strategies and aging satisfaction did not differ between young-old ( $M = 75.6$  years;  $n = 80$ ) and old-old ( $M = 85.7$  years;  $n = 76$ ). Regression analyses revealed age-differential predictive patterns for both age groups. Regarding the young-old, resources and SOC strategies independently contributed to the explanation of interindividual differences in aging satisfaction. In contrast, resources and their interaction with SOC use explained significant amounts of the well-being variance in the old-old group. Follow-up analyses confirmed that life-management strategies buffered the effect of low resource status: Old-old persons with low resources profited most from using SOC. These protective effects were also found for the specific SOC strategies loss-based selection and optimization.

Assuming that resource level in very old age might reach a critical limit and that SOC strategies manifest their specific protective effect when people are confronted with the limits of their functional capacity, a second study investigated subgroups of resource-poor ( $n = 21$ ) and resource-rich ( $n = 21$ ) older adults over one year (*Study 2*). Compared to the resource-rich, the resource-poor were characterized by less reported use of SOC strategies and lower aging satisfaction. The cross-sectional results of Study 1 were replicated longitudinally regarding the prediction of aging satisfaction. Life-management strategies protected well-being over time and served as a buffer against low aging satisfaction when resources were restricted. Resource-poor persons who reported using more SOC strategies, especially optimization and compensation, experienced as much aging satisfaction than resource-rich one year later. With respect to changes in aging satisfaction, resource-poor profited more from optimization than resource-rich: Resource-poor using optimization frequently showed less negative and more positive changes in aging satisfaction than resource-poor who utilized optimization less often.

Finally, an attempt was made to explore the interplay between negative changes in resources and the use of SOC strategies in a micro-analytic approach. Over the study time period of 12 months, resources remained relatively stable and resource loss was only identified for eight persons. Descriptive subgroup analyses and a single case study pointed to the protective role of SOC. Because these preliminary results seem promising, further studies should address the impact of the SOC strategies in situations of resource loss using a time-sequential and process-oriented design.

Taken together, this investigation was the first to show that SOC life-management strategies serve as protective buffers for subjective well-being in old age when resources become limited. Results demonstrate that resources as well as strategies are important determinants of successful aging, but that their dynamic interplay might be even more interesting. Empirical and practical implication are discussed.