METHODOLOGY AND FIELD EXPERIENCE

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METHODOLOGY AND FIELD EXPERIENCE

II.1 INTRODUCTION

This study seeks to understand the lives of the aged among India’s urban middle class retirees. In my attempt to do so, I have chosen a specific colony namely ‘Indira Nagar Colony’ in the city of Lucknow.

This chapter includes four sections. In the first section a brief history of Lucknow along with that of the colony has been presented. The second section takes up the much debatable issue of ‘objectivity’ and ‘subjectivity’ in social sciences. The third section elaborates on the methodology adopted for this study – the purpose of selecting retirees only and the process of data collection. In the fourth section an attempt has been made to learn about experiences from the field, to explore the dynamics involved in participatory observation, an exploration of the relationship between the object / subject of the study and the object / researcher. This section describes my field experiences, trying to delve into my relationship with the respondents. For just as I seek to learn about them, they seek to understand me and my research. It is in the process of this interaction that data emerges.

II.2 HISTORY OF THE FIELD AREA

Field work for this study was conducted in one of the colonies of Lucknow, the capital of Uttar Pradesh. The district of Lucknow is one of the six districts of Lucknow division. It is located almost in the middle of the state and is the seat of State Government. It lies between parallel of 26° 30' and 27° 10' north latitude and 80° 34' and 81° 21' east longitude. The city of Lucknow is situated almost in the centre of the district. It occupies an area of 79 sq.km. with a population of 1731224, according to the latest (1991) census.

Lucknow is a city synonymous with the Nawabi culture. The imperialistic splendour and magnificence of the Nawabi era has been glorified and eulogized down the ages by writers, poets and historians alike. Known for its cultural refinement, it is also associated with its legendary hospitality, leisurely moods of life and fabled edifices steeped in history. Tremors of time have not effected Lucknow of its cultural heritage and traditions.

No one knows definitely when Lucknow first became populated, who its founder was or how it got its name, but if family traditions and conjectures are taken as a basis, the following account can be given. It is said that after Raja Ram Chandra had conquered Ceylon and completed his term of exile in the wilderness, and after accepting kingship, he gave this region as reward to his devoted brother Lakshmana, who had accompanied him on his travels. To

4. Lucknow, U.P. Tourism Department, (pamphlet.)
commemorate the latter’s stay, a village was built on a high hill overlooking the river, which since that day has been known as Lachmanpur. The hill was called Lachman Hill and in it was a very deep cave with a well of which no one could estimate the depth. People said it went down as far as Sheshnag, giving impetus to religious feelings. However, it can not be said when this town changed its name from Lachmanpur to Lucknow.\textsuperscript{5}

There is also a story that the town is named after an ah: or milk seller named Lakhna, who as a result of spiritual blessings of a Muslim saint, had become rich and founded the town. However, most of these stories are apocryphal. Even the Ain-i-Akhbari, while dealing with the sarkar of Lucknow as a part of the suba of Avadh does not throw any light on the origin of the name of Lucknow.\textsuperscript{6}

Modern Lucknow is spread evenly on both sides of river 'Gomti' and is a perfect blend of the ancient with the modern. There are a lot of places of historical interest. Infact the greatest attraction of Lucknow is its historical moments and its ability to achieve harmony amidst disorder and to assimilate the new into the old.

Within Lucknow, the chosen field of study was the Indira Nagar Colony also know by the name of Ram Sagar Mishra Nagar. The colony was purposively selected keeping in view that it is a representative of most of the colonies in the

\textsuperscript{6} Sharma, V.C., opp-cit., p....
city. The proportion of the aged population who retired is large and also from different segments of the society. It is one of the largest colonies in Asia.

This colony is located on Faizabad road and covers an area of 550 acres. Construction of residential structures was undertaken by the Awas Vikas which started it in 1971 and by late 1974-75 the houses were given for occupation. It is divided into seven sectors, each sector having its own independent infrastructure - shopping complex, schools etc. Most of the houses are single storeyed having provision for future expansion. Basic amenities like water supply sewerage, street lighting and electrification, postal service and vikram services are also available. Three patterns of houses have been constructed - HIG (Higher income Group), MIG (Middle Income Group) and LIG (Lower Income Group). The Bhoothnath market, which has been built around the Bhoothnath mandir, is the centre of all activity in the morning and evening, in the colony.

People from various backgrounds, have settled in this colony, occupying MIGs and HIG's while the LIG's are generally occupied by lower (clerical etc.) working class population.

The elderly population is in large majority from the professions of doctors, engineers, bureaucrats, academicians, businessmen. They are also drawn from different religions. Most, however, are drawn from the section of the middle class. Before discussing the methodology of this study it is important to take a brief look at issue of objectivity and subjectivity in social sciences.
II.3. ISSUES OF OBJECTIVITY AND SUBJECTIVITY IN SOCIAL SCIENCE FIELD WORK

The main issue which arises when talking of field work is the issue of objectivity and subjectivity in social sciences. Scientific methods requires one to take a detached, impersonal and dispassionate view towards phenomenon being studied. To many sociologists, an objective science of society remains the goal of sociology.

'Objectivity' as the term is commonly understood is an outcome of the positivist tradition in social science and is seen as the testing ground for any 'meaningful' research in sociology or social anthropology. It has often been contrasted with subjectivity which is considered to be over representing the view of the subject or the researcher. Objectivity and subjectivity are often presented as polar opposites by the positivist tradition, and suggests that true objectivity in social science research needs to first eliminate the subjective element in order to be 'valid'. To achieve objectivity it has often been suggested that distance is required between the observer and the observed. As Diane Bell says:

...... it is the association of objectivity, the hallmark of science, with an absence of connection to one's subject matter, that have drawn the ethnographic lines in the sand. If one passes beyond the line, speaks of self as feeling, interacting, or as an element in a relational field, one becomes subjective and one's work is no longer good science.

However, Weber and other critics of the positivist trend in the social sciences did try to challenge the notion of objectivity in the social sciences. Unable to reject the goal of objectivity itself, Weber talks of establishing a different kind of objectivity in social sciences that rests on the study of subjective meanings and the subjective choices of social scientific investigations. The attempt is of redefining objectivity in the context of the social sciences.\(^9\)

It has been argued that people construct this world, define it and give it meaning. It is human agency that creates social reality which in turn constrains, influences and defines human behaviour.

The self is not external to, or different from the subject, whose life and being is often internalised or reproduced by the researcher. As Hastrup points out:

> Self and other, subject and object are categories of thought, not discrete entities' ... It is when the boundaries between self and the non-self collapse that we can speak of field work being in effect a social drama confronting the performers with their unfounded selves'. We are then 'ourselves' in the field, trying to decipher and understand social reality which is never fixed but always in a state of flux and movement.\(^{10}\)

Nothing is objective in the absolute sense. Consciously or unconsciously, subjectivity seems to pervade all our behaviour and actions in the 'disciplinary grid'. It is present in the way we formulate our hypothesis, the way we collect our data, make observations, analyse data, build theories, and in the way we

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present the findings of our data. The stress on objectivity seems to i.e. a hangover of the days when social sciences was trying to emulate the natural sciences. However, now it is necessary to recognise that the forced creation of objectivity by a social scientist also involves his or her subjectivity. The act of objectivity cannot but end up distorting the subjective but rich, authentic, experience of reality that the social scientist may have gone through.11

Objectivity then, does not mean that the sociologist reports on 'raw facts' that are 'out there' in and of themselves. Rather, it means that the sociologists conceptual scheme is in a dialectical relationship with the empirical date. The objectivity of sociological interpretation is closely related to what Max Weber called 'value freeness'. It is a passion to see, to see clearly, regardless of one's likes or dislike, hopes or fears. What is required is not giving up of values or trying to target them, but in the sense of controlling the way in which these values might distort the sociological vision. So the sociologists must 'bracket' these values as much as possible.12

H.A. Cantril says that objectivity, as it is usually conceived, is not only illusory, it is undesirable because:

scientific data may become inert and meaningless without value judgement, and science is reduced to a routine collection of facts...... The "Objectivity" of science can refer then only to the use of accepted rules of empirical research after the problem, the variables, and the experimental design have been decided upon. Here the investigator must use every precaution to see that he does not misinterpret what he sees.13

Infact Madan says:

........... Beyond a point, a stark opposition between scientific objectivity and 'subjective understanding' is sterile ... As Social anthropolotists we were concerned with the 'concrete' and the 'particular'; to adequately describe and interpret the same, and provide causal explanations when doing so seems appropriate and possible, we need 'abstract' and general concepts.\(^{14}\)

He talks of taking a middle position. One should try to maintain balance between being both in inside and outside situation - which mean: neither remaining outsider nor going native.\(^{15}\)

The subjective is as important as what is considered the objective element in field work. As long as the other remains the object of research, an inter subjective relationship between the anthropologist and his/her subjects in unlikely to be established. An object is something which can be constructed and deconstructed, mainpulated and shaped into ready made anthropological mould. This is the 'other' of anthropological research. The 'subject' is a person with whom the anthropologists seeks to have an inter-subjective relationship in the ethnographic process. It in only when the distinction between the self and the other is not so sharply defined, that we can attempt a truly human understanding of society.\(^{16}\)

However, there are certain points which must be followed while attempting field work. Socially conditioned 'habits of thinking' and practices have to be

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unlearnt to allow the phenomena of every day life to unfold without the intrusive presence of the ethnographer.\textsuperscript{17}

One cannot interpret another's meaning without changing, one's own meaning system to some extent. Moreover an overweening emphasis on the freedom of the individual observer must not be allowed to become an excuse for lack of methodological rigour. Likewise, or preoccupation with technical virtuosity should not be permitted to drive underground, the role that the observer's personality plays in what he observes, the links that he forges between data, and the kinds of structure that he prefers to fabricate to make sense out of the multitude of observed roles and relationships. Unlike the natural sciences, the social sciences endeavour to formulate concepts about human beings who have the gift of self consciousness. Preparation for research must not be so rigid as to eliminate flexibility in dealing with it. Formal self-analysis by the ethnographer before, during and after a spell of field work .. "feed back" becomes a most important resource for the social scientist. It is this encounter between concepts, between the observer and the observed, that is the first condition of anthropological and sociological research and the stuff of the researchers experience. To seek to eliminate the supposedly distorting role of the observer's subjectivity. If at all possible it would destroy the most precious of our tools - the field worker himself.\textsuperscript{18}

\textsuperscript{17.} Ibid, p.18.
II.4 METHODOLOGY

The universe of this study is the retired middle class population living in Indira Nagar Colony in Lucknow. This includes pensioners - those retired from central and state government services, as well as non-pensioners - from semi-government organisations and major aided institutions (undertakings) like those retired from Railways, Doctors in Government Hospitals, Engineers with P.W.D., Irrigation Department, State Electricity Board; those retired from Nationalised Banks, Co-operative Banks, UPDPL, to name some. Religion-wise though people from most of the religions - Hindus, Muslims, Sikhs and Christans are present in the colony - however Hindus are in majority. The houses in the colony have mostly being constructed by the Avas Vikas, Lucknow and are mainly of three types, HIG, MIG and LIGs. Recently, however even semi-constructed houses are now being put up for sale. Generally, the respondents selected live in the HIGs and MIGs. Many of them have got further constructions done on the present infrastructure.

II.4.a The purpose of selecting only retirees

According to Donahue, Orbach and Pollak "retirement brings a far reaching change in a persons social roles as a functioning member of the society and, as such, carries with it consequential implications of change in status."19 Retirement has different meanings - it may be from an active service at a fixed

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age under a formal retirement system or it may be gradual retirement from self-
employment, which is informal. This study is concerned only with the problems of those aged, who have retired under formal retirement system. The reason for selecting such people is that they undergo a sudden and abrupt change from their active work life, the day they retire, to a no-work situation. These formal retirees suffer more losses of socio-psychological nature than infirmities. There is a sudden change in their role performance, income, status and respect. The abrupt end to meaningful activity leads to problems of biological and social ageing with negative consequences. So, the fundamental problem of retirement role seems to be the lack of clarity and the ambiguity of the role. Although they get retirement benefits - pension, gratuity, provident fund and other fringe benefits yet the process of adjustment to more of leisure time, without a focal role to play posses a problem. The people who might be still physically fit and active are suddenly faced with the prospect of nothing to do. After a short period of leisure and relaxation, the same seems to be a burden as to what to do, how to spend the time and reorganise their daily life. It brings about a change in their own self perception.

II.4.b Method of data collection

This study makes a use of combination of sociological and anthropological methods - interview schedule and participant observation.

After the finalisation of the universe to be studied and selection of tools of data collection the next important step was to draw a sample which would be representatives of the population to be studied. At the outset a map of the
colony - Indira Nagar, was obtained from the office of Avas Vikas, Lucknow. The sample was to be drawn from those belonging to the retired middle class population in this colony. As already stated, for the purpose of study all the formal retirees have been treated as aged because in the social sense, old age begins in an individual's life at a point where he ceases to perform the duties and enjoy the rights of middle age. Moreover it marks a change in their life from work to non-work status.

After obtaining the map, a preliminary survey was conducted to get an idea of the sector and people residing. A sample was to be drawn from each sector, so the total size of the sample for administering the interview schedule was restricted to 350 only. After drawing around fifty sample from each sector those houses which were not owned by aged, or their children or when aged were not main rent payers and had retired formally were deleted from the sample. Also, those residing in MIG and HIG's were the universe of study; as the sample had to be drawn from middle class population. Help was taken from the elderly residents of those areas in gathering information about other retired persons, if any, in their block. So finally after preparing the list, the final sample size drawn came to be 350. So, it was a combination of random sampling as well as purposive sampling techniques.

The primary data was collected through interview schedule and participant observation. The former was done, so as to have a general information on the background, lifestyle, family life, health, finances etc. of the respondents. Moreover, schedules are beneficial as supplementary and extending devices in observation. They are also useful devices for isolating one element at a time.
and thus intensifying observation of it.²⁰

After the preparation of interview schedule a pilot study was conducted before finally giving it to the respondents. This was a kind of pretest of the schedules. Pretesting the quality of schedules before putting it in circulation is important as it provides not only a test of clarity of questions but gets a sense of the interpretation put upon them by the respondents. It also affords the possibility of discovering new aspects of the problem studied but not anticipated in the planning stage.²¹ It also helps in seeing if the questions are well connected and exhibit certain characteristic responses. The questions were also formulated to avoid ambiguity and limitation of responses. Both close-ended and open ended questions were included so as to obtain qualitative information also along with responses to be quantified. The questions were grouped in such a way that the responses could throw light upon every significant aspect of the life of the aged residing in the colony.

The schedule consists of the following sections - the first section was meant to extract a general information regarding the personal characteristics of the respondents like age, sex, religion, educational status, marital status, profession, retirement, choice of settling in Lucknow, place of origin etc. While the second section tried to focus on the daily life activities and routine of the retirees, role of friends and neighbours in their lives. The third section dealt with collecting information on the family life of the aged - the structure and

²¹ Ibid, p.207.
composition of the respondents family, the nature of relationship with spouse and children, daughter-in-law, grand children and the patterns of interaction; their status and role in the family before and after retirement; their attitude towards their family; changes if any that they perceive after retirement. The fourth section focuses on the health status of the aged, medical facilities available, problems faced; the kind of help they expect and get. The fifth section was designed to throw light on their financial condition, source and adequacy of income, their assets liabilities and in general their economic status. The sixth section tried to bring out their perception of retirement - whether it poses a problem; awareness of government policies and programmes and facilities for senior citizens, their views on institutionalization and in general their opinion on what should be done to maintain a healthy retired life. The last section was to gather general information on their opinion on the happenings in the society, the changing values system and the like. This was especially worked out to see if they were still in touch with wordly happenings or had completely withdrawn themselves and see the points of contentment and discontentment.

Along with interview schedule, participant observation was also carried out so as to get a spontaneous and real picture of the life of the aged.

This method refers to those "forms of research in which the investigator devotes himself to attaining some kind of membership in or close attachment to an alien or exotic group that he wishes to study. In doing so he attempts to
share the world view and to adopt the perspective of observed.\textsuperscript{22} This method was employed to get a spontaneous and unposed picture of life of the respondents. It was favoured especially because of its tendency to supply naturalness and completeness of behaviour allowing sufficient time for observing it.

Infact the main virtue of observation is its directness. It makes it possible to study behaviour as it occurs and enables in getting data that are uncontaminated by factors standing between the investigator and the object of research.\textsuperscript{23} It is a more detailed approach, to live with and participate in the society to be studied and observe genuine life situations and day to day routine.\textsuperscript{24} It seeks to understand the subject's world as he or she perceives or experiences it. It generates a richer indepth information.

This also helped in understanding a small activity better as human phenomena don't speak for themselves; they must be interpreted in that circumstancace of occurrence. This interpretation must have a human dimension. There is a particular existential attitude in patient, careful, attention to the meanings of other people's lives, to the 'deciphering' of the inner meanings. Implied in this attitude is a respect for other and their intentions, hopes and ways of life. Implied further is a determination to see the social world as it is, regardless of one's own wishes - that is, to separate what is from what one believes ought to be.\textsuperscript{25}

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23. Ibid, p.156.
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The personal experiences during the field work was kept in a diary in the form of brief statements with respect to the information gathered during the period, noting down events, interactions, discussions etc. These statements and informations accumulated from time to time during the course of field observation really helped as rich raw material for writing the thesis.

Infact, keeping of research diary was considered because it helps in informal and intimate portrayal of individual experiences and to note down the minute details which at that point may not seem to have much relevance or any direct connection; also to avoid anything to be missed out upon and it would be possible to trace processes and sequences in the situations studied; recording experiences with respondents and stray facts which come up during the field experience. Many loose strips / chits were also kept in the dairy which were later sorted out subject wise and re-grouped in the light of different aspects of study. Though most of the noted down information provided a deeper insight into the research work however there were few facts which were not found to be of much relevance.

All human situations carry meaning - if one prefers, are illuminated by meaning from within themselves. The purpose of sociological interpretation is to bring out these meanings more clearly, and to relate them to other meanings and meaning systems. Even in cases of ordinary conversation in everyday life, what is involved is an interpretation of the meanings of others through a complex interaction and interpretation of relevance structures, meaning systems and bodies of knowledge.26

26. Ibid. p.45.
To convey the meanings of conversations clearly, to grasp their view of the world and to bracket my own for some time interpretation or analysis of data was not done after collecting facts. In fact it was a constant process of trying to reorganise and analyse the facts while collecting it. In words of Berger and Kellner:

the ongoing activity of interpretation is taking place within my own mind while the external conversation is going on; my interpretation takes place in an inner conversation which is crucial sotto voce accompaniment to the verbal exchanges.27

This analysis of informal discussions and interactions immediately after writing down helped in filling up the gaps by further questioning. It also helped in maintaining a sort of consistency of the facts collected in fragments at different points of time. Analysis from time to time was considered as essential so as to place together the more important factors and relate to each other and do away with the inessential facts.

II.5 FIELD EXPERIENCE

Field work is a personal experience, for it involves close interaction with the subject of one's research. Every field worker has to arrive at his own question with his informants. There can be no clear cut prescribed formula for handling any given field situation, for each situation is unique. While there are certain standardized research techniques, the manner in which they are used and the results that they yield depend on the rapport which the observer is able to

27. Ibid. p.28.
establish with his informants. Field work is an amalgam of methodological rigour and the unpredictable consequences of the personality of the observer. In the ultimate analysis, each field worker must face his own challenge and experience, his own triumphs and tribulations.

Since I stay with my parents in the colony I was already conversant with its geography and general environment where a majority of the population consists of aged persons from various backgrounds. However, to do justice to my research work I started with putting in extra efforts to better my information on the residential set up of the colony its market place, clubs, health clinics, medical facilities etc. For getting a proper and accurate picture of the colony I managed to get the map of the colony from the Avas Vikas Office in Lucknow.

After getting acquainted with the physical set up of the colony I started with the task of establishing rapport with the elderly residents of the colony to know more about them, their life experiences, problems, post retired life and old age. This was important because to build up a detailed picture of the life of the respondent, together with their attitudes and view of life it was considered necessary to be a part of their universe, which in turn required a proper rapport. Though this was not very difficult; however, whether access to the field is relatively easy or relatively difficult, each field worker must make the effort of establishing rapport with the people he/she seeks to study.

The unique feature of my universe of study is that most of them are quite health conscious and go regularly for morning walk be it summer or winter. In fact even during the rainy season one can catch many of them going for the morning stroll in groups with their umbrella. Though staying in the colony, I'd seen this earlier too but had not paid much attention to it except for taking it to be group of more health conscious people. But, once I was in the field, such accounts acquired new meanings and brought to forefront other important reasons. It seems that, this not only serves their purpose of staying fit but a very important way of interacting with their friends and acquaintances, a way socialising as most of them can be seen in groups. The topics of conversation has a wide range from politics to daily life talks to memories of service days. So the mornings are something which they look forward to. I had to get up early in the morning and go for stroll to mix around with them, which initially was a bit difficult for me, but gradually it became part of my daily routine and a pleasant experience. This not only proved to be useful in gaining an understanding of the field, but also in furthering rapport building with them.

I started with informal chats, telling them about myself, my research topic, my institution etc. Most of them were very thrilled about the research topic. They felt that atleast somebody was interested to know about the aged and retired person, their lives and experience and assured all possible help with readily giving in their experience. Infact, most of the things which I wanted to know about them and their lives, often came up during the course of casual conversation. Despite this, it took me a long time of almost seven to eight months to get indepth understanding and relevant data. The earlier first few
weeks round of talks made me feel that they were very jovial, balanced and least concerned type of aged. But as I started getting closer, things other than this emerged. It seems that the first impression was a facade. Like Beteille and Madan mention that one of the strongest argument in favour of intensive fieldwork is that every field worker knows that some of the best data collected in the first week or the first month later turn out to be completely wrong. A coherent picture of the community in which one lives and works does not emerge in a day or week. One arrives at a preliminary understanding, then makes fresh observations which connects ones first impressions, and this makes the picture a little different, perhaps a little more complete.\(^{31}\)

However, as the study of human society would indeed become a dull affair if some magic formula could be devised which would enable the field worker not only to foresee all possible problems but to solve them in the ordinary course of his work.\(^{32}\) There were a few who were really difficult to approach. They preferred to stay aloof and reticent and were absolutely unconcerned. At times I had to visit the same house a number of times in order to meet the respondents personally. Some found it difficult to comprehend as to why some one should study about the lives of aged, their problems; what was the use of such study; would it make their lives any better or worse. While still others thought of it to be a waste of time, answering the questions in interview schedule, mixing up with them and did not like to be disturbed. Only persistent efforts on my part did help prodding people of that group to speak about their life

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32. Ibid, p.64.
experience. I tried to convince them that it was just for the sake of knowledge, to know and understand their lives better and purely for academic purpose.

At times, I did feel that being a woman, it gave an advantage in terms of getting a warm response rather than a cold shoulder. As I have mentioned earlier that some respondents remained disinterested and were a bit cautious in the beginning but after I satisfied their set of questions, they were more cooperative and shared their views. In such situations, the presence of female researcher may be a definite asset, especially in a male dominated setting, because females generally are perceived as less threatening than males.33

My role was more of as observer participant rather than that of a participant as observer.34 So my primary role was that of an observer and it was as that, that I sought acceptance in the field. My respondents were fully aware of me as a research scholar. Yet by living in the colony, I was also a participant, informally collecting information, going deeper into their daily life routine, trying to mix around as much as possible, attending some of their regular meetings and get-togethers and understanding their patterns of interaction.

As I got closer to my respondents I found that most them were almost nostalgic about their past. In the absence of any constructive future, most of them kept clinging to the past memories of the hey days their service years,

even though that past might not have been so rosy as portrayed. By talking about stray incidents of the past they tried to make their present warm and comfortable. Another aspect of peculiarity was their adopting a very critical approach to the present living style of young people, the system in general and about the decaying traditional and moral values.

Some of them had their children staying abroad. Again here, most of them tried to draw prestige by talking about children accomplishments.

My daughter has been in United States for the past 10 years, is a very successful doctor, why should I worry ....

What can the young generation achieve in this country, say ....

and the like were some of the responses. But at the same time it was these people who talked of the modern materialistic attitude of younger generation; their self-centeredness. They talked of feeling lonely and sad for the children being so far away from them and wished that they were staying some where near them. This duality of response was peculiar. It could have been a way to pacify themselves for the infrequent meetings.

Many of the respondents, while responding to the interview schedule, would talk almost endlessly. It appeared as if they longed to talk to someone about their lives, the daily happenings and routine and how they felt. Most of them seem resigned to destiny. Very few showed contentment with their present living. However, on the whole they were quite co-operative but one could see the emptiness in their lives despite all adjustments.