

# *RJS*

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Knowledge in Contention  
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## About RJS

*The Rutgers Journal of Sociology: Emerging Areas in Sociological Inquiry* provides a forum for graduate students and junior faculty to present well-researched and theoretically compelling review articles on an annual topic in sociology. Each volume features comprehensive commentary on emerging areas of sociological interest. These are critical evaluations of current research synthesized into cohesive articles about the state of the art in the discipline. Works that highlight the cutting edge of the field, either in terms of theoretical, methodological, or topical areas, are privileged.

### Editors:

Jorie Hofstra, Rutgers University  
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## EDITORS' INTRODUCTION

JORIE HOFSTRA

KATHRYN BURROWS

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This volume of *The Rutgers Journal of Sociology* addresses the theme of **Knowledge in Contention**. The authors included in this volume approach the theme from different angles. In "Power in the Production of Transgender Knowledge: The Controversy over *The Man Who Would Be Queen*," Elroi J. Windsor argues, through close analysis of a public controversy over ways of knowing about transgender people, for the importance of positionality to the production of knowledge of marginalized populations. Windsor concludes with recommendations to aid social researchers in producing knowledge about transgender issues without pathologizing transgender identity. In "Marital Warriors? Producing Knowledge to Deflect Controversy in Marriage Promotion Efforts," Melanie Heath uncovers a system of marked and unmarked knowledge upon which members of the marriage promotion movement strategically draw in order to represent their cause as apolitical and uncontroversial. Heath complicates the culture wars framework for understanding contentious social issues by showing how elites select and oversimplify social scientific research in a way that reproduces unmarked assumptions about the normal and the natural, thus deflecting controversy from their position. And finally, in "Aging as Disease: How Radical Views on Longevity Expose Unexamined Assumptions in Mainstream Theory on Successful Aging," Maoz Brown's study of the intellectually marginal aging-as-disease movement reveals a broad base of assumptions shared with mainstream gerontology in spite of apparent conflict. Brown outlines the challenges this fringe movement thus poses to scholars of aging and to society in general. Together, these authors contribute to our understanding of how interested actors navigate the controversies surrounding knowledge claims, and how controversy shapes the forms of knowledge produced.

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**POWER IN THE PRODUCTION OF  
TRANSGENDER KNOWLEDGE:  
THE CONTROVERSY OVER  
*THE MAN WHO WOULD BE QUEEN***

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In this article, I theorize the epistemological relevance of a controversy in the study of gender and sexuality. I review the backlash inspired by the 2003 publication of J. Michael Bailey's *The Man Who Would Be Queen: The Science of Gender-Bending and Transsexualism*, and the fallout resulting from Alice Dreger's exegesis of those events. My review of this history highlights contentious issues related to the production of knowledge regarding transgender subjectivities. I consider the importance of positionality within relationships between researchers and the researched, and demonstrate the implications of doing research within a historical context affected by sociopolitical tensions. Finally, I invite scholars to contemplate how contentious classifications and etiological assertions inform scholarship within the sociology of knowledge. I offer strategies for decentering the production of knowledge through foregrounding transgender subjectivities.

**W**hen distinguished scholars from privileged positions publish about the lives of marginalized people, how authoritative are their claims? When researchers expose intimate details about a group of people who have endured a history of systematic exploitation, should these researchers bear more responsibility in representing these accounts, especially when past abuses have largely originated from scholars in their own field? And what happens when the subjects of study push back, arguing that their experiences have been distorted, perverted, and inaccurately portrayed? When the marginalized population under study critiques, or even attacks, the "science" about their lives, how credible is their account? The epistemological questions framing the present article address how different perspectives on sensitive topics inform the production of what gets labeled scientific knowl-

edge. My argument that scientific and experiential expertise offer two distinct—and often contentious—“ways of knowing” highlights the importance of positionality and sociopolitical context. Through a review of the controversy surrounding the 2003 publication of J. Michael Bailey’s *The Man Who Would Be Queen: The Science of Gender-Bending and Transsexualism (TMWWBQ)*, I illustrate tensions in the production of knowledge. The lessons extracted from this complicated drama allow sociologists to reconsider fundamental issues regarding relationships between researchers and the researched, and the oppressive contexts in which these studies occur.

Social scientists have often considered the importance of “researcher positionality,” or how the identity (e.g., race, class, gender, sexuality) and biography (e.g., life experience, personal history) of a researcher focus the lens through which a subject is analyzed and interpreted. In 1972, sociologist Robert Merton considered whether “insider” members of a community, because of their privileged access to that community, gathered more valid data than “outsiders” who did not share that community’s salient identity or experience. Although Merton argued that neither position was superior to the other, feminist, queer, and postcolonial scholars continue to direct critical attention to debates about the insider/outsider dilemma. Feminist scholars have pointed out that “[h]ow one defines the nature of the relationship between researcher and researched depends on one’s epistemological stance” (Naples 2003:4). Sociologists Dorothy Smith (1974) and Patricia Hill Collins (1990) theorized the importance of standpoint epistemology and intersectionality, respectively, and attention to researcher positionality and reflexivity remains a central concern for many scholars. Researchers’ positionality can affect their “ways of knowing” about a subject: their own identities and life experiences shape their ability to study and interpret aspects of social life and then confidently assert research findings—products which then become scientific knowledge. These considerations are especially important for those who study marginalized communities with histories of oppression (DeVault 1996; Hesse-Biber et al. 2004; Naples 1996). When members of a marginalized community reject the

“science” of their experiences, or challenge the expertise of the scientist, questions arise regarding authority and authenticity in the production of knowledge.

Transgender people represent one type of a marginalized community because their gendered experiences violate gender norms. The term “transgender” refers to a wide variety of gender nonconforming behaviors and identities, such as drag performers, crossdressers, and people who do not identify with binary gender terms. A transgender person may also be transsexual in that the person is living as a different gender than what might be expected to follow their assigned birth sex. A transsexual woman, for example, is a person who was assigned the sex “male” at birth but lives and identifies as a woman. She may identify as a transgender woman, a transsexual woman, a trans woman, a woman, and more.

Historically, researchers of transgender experiences were outsiders who studied transgender phenomena from the position of being cisgender, or non-transgender. Transgender women have been an especially central focus for decades of psychomedical studies of transsexuality (King 1993; Meyerowitz 2002) and their experiences have often been pathologized (Serano 2007). Participation in clinical studies was once required of trans people seeking medical services (Serano 2007), resulting in strained relationships between trans people and healthcare gatekeepers who authorized eligibility for medical services like hormones and gender-affirming surgeries while they conducted research (Bockting et al. 2004; Meyerowitz 2002).<sup>1</sup> Non-clinical social studies of transsexuality (e.g., Billings and Urban 1982; Raymond 1979) have also denigrated trans people in a way that amounts to systematic scientific oppression of transgender people. This history has made many transgender people wary of participating in research.

The context of scientific oppression of transgender people informs the debates over Bailey’s book. The controversy ignited by *TMWWBQ* amplified longstanding tensions between transgender people and the researchers who study them. It highlights how one person’s account of, or way of knowing about, transgender lives inspired a powerful reaction within academic and transgen-



der communities. More generally, it epitomizes how contentious claims frame and inform the production of knowledge. In the next section, I review the two waves of the controversy related to Bailey's book and analyze the ways these events highlight transgender knowledge in contention.

### **Overview of the Bailey Controversy**

The controversy occurred in two waves. The first wave included the backlash following the 2003 publication of Bailey's book. The second wave involved an investigation of those events published in 2007 by sex and gender historian and bioethicist Alice Dreger, and the subsequent responses. Both waves demonstrate contention between ways of knowing about transgender people.

#### *The First Wave of the Bailey Controversy: The Book and the Backlash*

In 2003, Joseph Henry Press published J. Michael Bailey's *The Man Who Would Be Queen: The Science of Gender-Bending and Transsexualism*. Since before the book was published, Bailey has worked as Professor of Psychology at Northwestern University (Bailey N.d.). He is an established "sex expert" (National Academies Press 2011b), bolstered by decades of publications in prestigious academic journals in the area of gender and sexuality. In the book's preface, he stated: "Although I am virtually certain that my conclusions are correct, they fly in the face of mainstream academic opinion" (Bailey 2003:x). Bailey knew the theories his book supported were unpopular and politically incorrect. According to Alice Dreger (2008a), Bailey's colleague at Northwestern, he intended the book to be a popularization of several sexological theories pertaining to femininity among males. Stereotypes about gay men as feminine are contentious, and Bailey acknowledged so when he wrote "[t]o say that femininity and homosexuality are closely bound together in men may be politically incorrect, but it is factually correct, and it has been known for a long time" (2003:xi). Bailey explored male femininity throughout the book, examining gender nonconforming boys, feminine gay men, drag

queens, crossdressing males, and male-to-female transsexuals, mostly from a psychological standpoint. The book is written in an accessible style, and Bailey illustrated his theories with vivid case stories of people whom he met socially. The book lacks the academic citations characteristic of scholarly publications; it merely provides an appendix of suggested readings and films.

In the book, Bailey presented disputable generalizations about male-to-female transsexuality. He rejected the standard “feminine essence narrative,” or the widely held belief that male-to-female transsexual women are motivated to transition because they have an inner woman gender identity. Doctors and therapists have used the standard “inner essence” model to align the body (sex) with the mind (gender identity) since the 1960s, as transsexuals asserted the existence of a true or inner self that needed to be freed (Meyerowitz 2002). Although this model is not immune to critique, psychomedical communities have established etiological theories and treatment protocols in line with its central idea (King 1993). Bailey’s views on transsexuality stemmed instead from theories originally developed by another controversial sex researcher, Ray Blanchard. According to Blanchard (1985; 1989a; 1989b), transsexual women can be classified into two disordered types: 1) the *homosexual transsexual* who was born male, is sexually aroused by men, and becomes a woman to attract men, and 2) the *nonhomosexual* or *autogynephilic transsexual* who was born male, is sexually aroused by the thought of oneself as female, and is thus sexually motivated to become this woman within. Bailey believed the transgender women he met fit distinctly into these two types, even if they disagreed with his assessments. Bailey thus aligned himself with Blanchard’s inflammatory theory, which is based on shaky evidence, lacks scientific substantiation (Serano 2007), and has been criticized for its exclusion of examining similar phenomena in cis-gender women (Moser 2009).

Bailey characterized people whom he thought of as autogynephilic types as persistent liars who were willing to do anything to achieve the bodies they desired. He quoted one “ace gender clinician” who asserted that “[m]ost gender patients lie” (Peterson, quoted in Bailey 2003:172). While the autogynephilic types

were liars, the homosexual types were thieves and prostitutes, according to Bailey: “[m]ost homosexual transsexuals have ... learned how to live on the streets. At one time or another many of them have resorted to shoplifting or prostitution or both” (p. 184). He had little faith in their ability to live what he deemed “normal” lives. After recounting the story of a trans woman he met who had an “engagement story [that] was quite romantic, in an odd, transsexual kind of way” (p. 210), Bailey explained how this woman had separated from her husband after a year of marriage. This event, along with his lack of knowing any happily married trans women, led Bailey to conclude:

Nearly all the homosexual transsexuals I know work as escorts after they have their surgery. I used to think that somehow, they had no other choice because conventionally happy lives were beyond their grasp. I have come to believe that these transsexuals are less constrained by their secret pasts than by their own desires. And these desires, including the desire for sex with different attractive men, do not make conventional married life easier. (P. 210)

With many such characterizations, Bailey effectively dismissed trans women as promiscuous and dishonest criminals. The vivid anecdotes recounted in his book helped illustrate and publicize the unpopular theories of Blanchard. Bailey’s accounts provided salacious details about transgender people—a community many cisgender people had heard about but did not fully understand. Curious but uninformed readers would likely understand Bailey’s account as accurate, especially given its scientific guise.

Although the book is not a scholarly manuscript *per se*, it has an air of scientific authority about it. The word *science* is in the book’s subtitle. The book’s publishing house is a renowned scholarly imprint of The National Academies Press, which touts itself as “capturing the most authoritative views on important issues in science and health policy” and being “the right place for definitive information” (National Academies Press 2011a). The book’s jack-

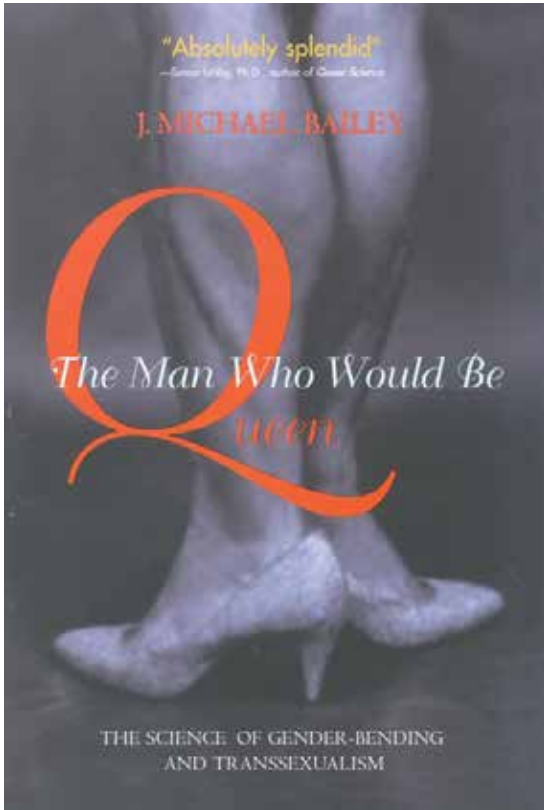
et description declared: “Based on his original research, Bailey’s book is grounded firmly in science” (National Academies Press 2011b). And throughout the book, Bailey writes of his research and being a researcher, emphasizing his established expertise on the subject. Ultimately, the trappings of science that mark the book frame its contents as authoritative. Bailey thus appears to have the power to know his subjects. He is experienced, professionally trained, and respectably employed. He appears to be an objective outsider to the atypical phenomena he studies. His interpretations, however, were challenged by some of the people whom he claimed to know best.

Shortly after the book’s release, Lynn Conway received an email alert about Bailey’s book and promptly alerted her friend Andrea James (Conway 2008). Both women are transgender and prominent figures in the trans community, and they launched an investigation into the book’s publication. Since 1999, Conway has been a Professor emerita of electrical engineering and computer science at the University of Michigan, Ann Arbor (Conway 2012). At the time of the book’s release, James held a Master’s degree in English from the University of Chicago, and had worked as a writer, director, producer and activist (James 2012). One of Bailey’s key informants, Charlotte Anjelica Kieltyka, also a transgender woman, told Conway and James that Bailey used her—albeit under a pseudonym—as the poster child for a sexological theory she found appalling and that grossly misrepresented her life narrative. Kieltyka felt hurt, exploited, and defamed (Conway 2003b). With this new information and ally, Conway and James refocused and intensified their campaign, which ignited an intense backlash against Bailey and his book.

They joined forces with Deirdre McCloskey, a Distinguished Professor of Economics, History, English, and Communication at the University of Illinois at Chicago since 2000 (McCloskey 2012). McCloskey is also a transgender woman who critically reviewed the book (see McCloskey 2003). With this alliance, Kieltyka became a subject with her own voice instead of an object analyzed in Bailey’s study. The “known” subject—backed by a powerhouse of resources in Conway, James, and McCloskey—challenged Bailey’s position as the “knower.” Using Conway’s and James’s high-

traffic websites as informational clearinghouses, these transgender women constructed exhaustive essays, elaborate timelines, damning diagrams, and satirical cartoons to criticize Bailey and his book. They quickly garnered support from many transgender people and their allies from a wide range of academic, clinical, and grassroots communities (James 2007b).

Bailey's book, methods, and character provoked many critical evaluations; here, I review three main points of contention. First, critics argued that the book was patently offensive. Second, they stated that it was unscientific opinion masquerading as science, and thus potentially dangerous. Third, they accused Bailey of scientific misconduct. Each of these critiques highlights tensions in ways of knowing.



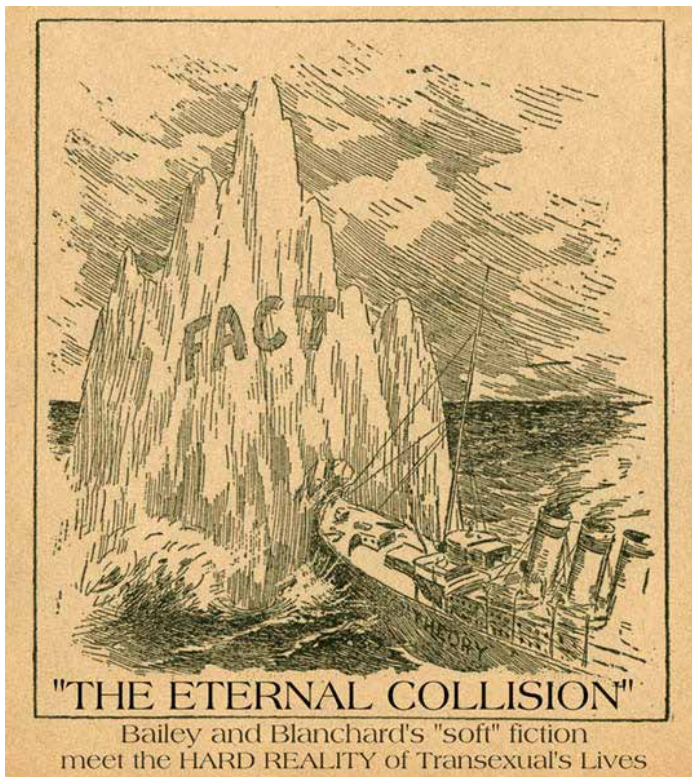
**Figure 1.** Front cover of *TMWWBQ*

Bailey's critics deemed the content of *TMWWBQ* offensive, heterosexist, and transphobic. To begin, the book's cover image—a photograph of muscular, hairy legs in sparkly high heels (see Figure 1)—evokes tired stereotypes (Conway 2004). The tone of the writing throughout the book is also offensive, especially Bailey's gross mischaracterizations of trans women as liars, thieves, and prostitutes (Conway 2003a, 2003b). Finally, Bailey's opponents were astounded at his audacity in discrediting transsexuals' interpretations of their own experiences (Conway 2003a).



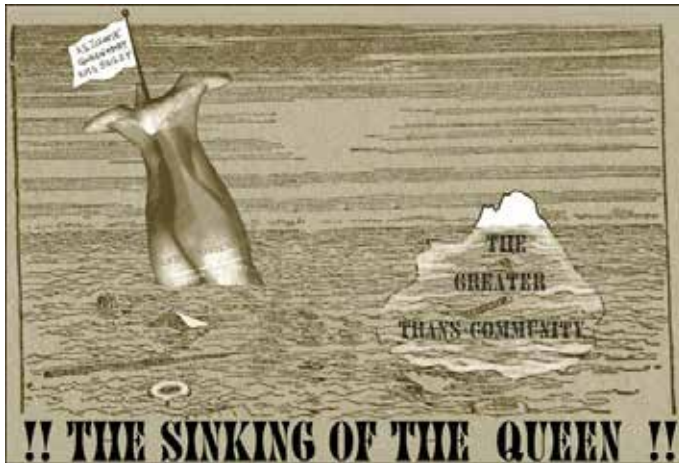
**Figure 2.** "Confused Captain of the Ill-fated 'Queen.'" KIELTYKA'S (2003a) depiction of Bailey's scientific masquerade

He envisioned his book as revealing a truth about transsexuality that dissenting transgender women actively concealed and denied (Dreger 2008a). Despite his proclaimed support for medical transition as a means for making transgender women happier, Bailey's biased assertions and lurid examples caused him to become viewed as an insensitive, dangerous enemy of transgender people (Dreger 2008a). And as a cisgender man, Bailey lacked a personal understanding of transgender experiences. His critics wondered how a person who held trans women in such disfavor and who did not share their experiences could ever present an accurate portrayal of their lives (see Figure 2).



**Figure 3.** "The Eternal Collision," Kieltyka's (2003d) depiction of the clash between the theories of Bailey and Blanchard and the realities of transsexuals' lives

Bailey's critics also argued that his book was scientifically unsound. Although decades of research on the conflict between one's inner gender identity and their assigned sex at birth informs treatment standards for medical transition (King 1993), Bailey rejected this body of knowledge. Instead, he accepted Blanchard's typology of transsexuals, despite its lack of evidence. The critics challenged Bailey's haphazard use of a handful of contacts with transsexual women to provide what he viewed as clear evidence for an unpopular and pathologizing theory (see Figure 3).<sup>2</sup> They argued that the scientific tone embedded in the book and embodied by its author conveyed an illusion of actual scientific merit and worried that this presentation could have devastating effects on public opinion and policy. Critics feared mainstream reception of the book as expertly credible (Conway 2003a, 2003b, 2004; James 2003, 2007b; McCloskey 2003). This fear highlights the power of positionality in representing marginalized people in the popular press. Bailey's critics knew that he could be received as an expert outsider, free from any bias associated with belonging to the community he studied. Bailey's decision to present his interpretations in the guise of science thus prompted opponents to attack the quality of Bailey's research.



**Figure 4.** “The Sinking of the Queen.” Kieltyka’s (2003e) depiction of the backlash



A third major critique launched in the Bailey controversy accused him of scientific misconduct (see Figure 4). Bailey's opponents argued that because the book masqueraded as a work of science, the research it was based upon could be challenged through official agencies regulating the production of scientific knowledge. Kieltyka, Bailey's archetype for autogynephilia, informed Conway, James, and McCloskey about her interactions with Bailey. She provided them with insider information that caused them to question Bailey's ethical standards and scientific methods (Dreger 2008a). Along with Kieltyka and three of Bailey's other transgender women subjects, McCloskey and Conway filed formal complaints with Northwestern University. They charged Bailey with failing to secure informed consent from research participants, conducting research without Institutional Review Board (IRB) approval, and having sex with a research participant (Dreger 2008a).

Charges attempting to discredit Bailey as unethical and unprofessional came from informal and formal channels. The critiques distributed through informal internet forums were powerful; they were clear evidence that a researched community was capable of publicly challenging the research. But filing with university officials offered a potentially more effective way to hold Bailey accountable. As academics, Conway and McCloskey likely knew about the power of the IRB as an institutional authority to sanction Bailey and affect his future research pursuits. The process of filing formal charges also afforded agency to transgender women, who thus sought justice within an authoritative system.

The trans women at the heart of this debate openly and officially disagreed with Bailey and Blanchard. They discredited Bailey's research methods, challenging his unilateral, "scientific" way of knowing about a subject with which they had personal experience. The critiques, leveled by members of a marginalized community, illustrate grassroots resistance to authoritative epistemological claims and professional credibility. This clash between the theories of scholarly experts and the lived experiences of individuals raises questions about who has the authority—or even right—to explain identity development.

The backlash against Bailey also included some controversial tactics. Bailey claimed to have been harassed at home and work

by some transgender activists (Dreger 2008a). The most notorious incident parodied Bailey's simplified and sexualized classifications of transsexuals. Alice Dreger reported that Andrea James used her website for posting "pictures of [Bailey's] children with their eyes blacked out, asking whether his young daughter was 'a cock-starved exhibitionist, or a paraphiliac who just gets off on the idea of it?' and saying that 'there are two types of children in the Bailey household,' namely those 'who have been sodomized by their father [and those] who have not'" (Dreger 2008a:4, quoting James). Although James used this tactic for its shock value, it appalled many. She later replaced the images of Bailey's children with photos of herself as a young child. James (2003) explained that she posted the original photos "in hopes that Bailey would have the same initial feeling of shock and disgust that I felt when I read his book. I guess I hoped it might make the guy think twice about the way he was hurting innocent gender-variant children with his arrogant book and lectures." James's tactic got noticed. The backlash received exceptional media attention. An article in *The New York Times* referred to the Bailey controversy as "one of the most contentious and personal social science controversies in recent memory" (Carey 2007).

More importantly, James's activism worked to challenge the objectivism of Bailey's "science." Her reaction showed that misrepresented people from marginalized communities need not play by the rules of academia. As Blanchard, the main proponent behind the theory of autogynephilia, stated:

I guess to some extent I'm used to academic controversies, and however vicious those get, people have a common understanding of where you draw the line about disputing a theory or an idea. In this particular battle, people were not playing by the familiar academic rules. James put up pictures of Mike's children, people moved to have books removed from consideration for awards. This was totally out of the rules of discourse. (Blanchard 2006, quoted in Dreger 2008a:417)

In this controversy, online networks became potent forums for challenging scientific authority. Internet activism, uninhibited by expectations for maintaining any professional reputation, provided strategies to challenge researcher power. This way of challenging what is known about transsexuality propelled Bailey into unexpected domains where he experienced intense public scrutiny. In these situations, the roles reversed. A researcher became the subject, and members of the researched community leveled their own critical analyses. In this context, marginalized communities held researchers accountable for their work. The power in ways of knowing shifted, “out of the rules of discourse,” as Blanchard bemoaned.

Throughout the backlash, its primary architects succeeded on some levels. They achieved an alliance with the officers of the Harry Benjamin International Gender Dysphoria Association,<sup>3</sup> and successfully campaigned to have the book withdrawn from consideration for a Lambda Literary Foundation award. These victories suggest that trans people have the power to discredit cisgender “experts” who write about them in ways that are offensive, demeaning, and based on questionable science. The Provost’s office at Northwestern will not release the findings of their investigation, nor will Bailey reveal them. However, Dreger (2008a) reported that it is likely that Northwestern did not find scientific misconduct, because they could not classify Bailey’s book as scientific inquiry. For the same reason, it is also likely that they found no violation in conduct regarding sex with a research subject. He did, however, vacate his departmental chair position in 2004, shortly before the investigation concluded (Dreger 2008a). Bailey’s professional reputation was smeared—he received a lot of negative publicity in various online forums—but he retained full employment at Northwestern. He has not been discredited by his academic peers and continues to publish psychological studies of gender and sexuality. He remains controversial; in 2011, he received more negative media publicity for allowing students to watch a live sex demonstration that involved stimulating a woman with a “fucksaw” after his Human Sexuality class (Svitek 2011). Northwestern, in turn, defended him and “efforts of ... faculty to further the advancement of knowledge” (Spak 2011).

The first wave of the Bailey controversy highlights important themes in ways of knowing. Relationships between the knowers (the scientists) and the known (the researched) are not always amicable. When conflicts arise, they highlight tensions about the production of knowledge and who has the authority to communicate about social life. Seasoned professional scholars may not be more expert than persons who draw from lived experience to back their claims. Members of the psychomedical community may have the power to construct transgender experiences as pathological, but transgender people can disrupt those classifications, just as gays and lesbians challenged the pathologization of homosexuality.

### *The Second Wave of the Bailey Controversy: The Case History*

By 2005, the momentum of the backlash had dwindled (Conway 2008). But in 2006, Alice Dreger made a decision that reignited the fading controversy. Early in 2006, Dreger met Bailey and found that he was not the homophobic and sloppy scientist that she had heard about. A few months after their first meeting, Bailey informed Dreger that James was scheduled to speak at Northwestern. Dreger asked Bailey for more information about James. Disgusted by James's tactics, Dreger blogged about her disappointment that James was coming to campus. Dreger (2008a) reported that James then started harassing her, threatened her and her family, and promised to tarnish her professional reputation. James, on the other hand, reported that Dreger's feud was one-sided and one she was not interested in maintaining (James 2007a). At this time, Dreger (2008a) claimed to have received support from numerous transgender people who felt silenced by James. These events invigorated Dreger, who then felt "a strong desire to know the truth about Bailey's work and the controversy surrounding it" (Dreger 2008a:369). She decided to conduct her own investigation into what had happened, and began to compose a "scholarly history" of the Bailey backlash (Dreger 2008a:367), thus sparking the second wave of the controversy.

Dreger posted her report on her website in the summer of 2007. Kenneth Zucker, editor of the *Archives of Sexual Behavior*,

agreed to publish the uncharacteristically long manuscript of nearly 53,000 words and posted an open call for commentaries at that time (Conway 2008a; Dreger 2008a). Dreger's account included extensive research of the incidents that transpired in the first wave of the controversy. She interviewed some of the primary people involved, including Bailey and Kieltyka. The transgender women who spearheaded the debate, however, declined to participate as Dreger would have liked. Instead, Dreger analyzed the internet publications these women produced, pored through e-mail exchanges and media accounts, and contacted many affiliated people, including Bailey's colleagues and prominent members of the transgender community (Dreger 2008a).

Ultimately, Dreger believed that Bailey was not guilty of scientific misconduct.<sup>4</sup> She concluded that Bailey's book did not count as research because it was not systematic, scientific inquiry. She wrote:

He simply picked people who came with good stories ... to put human faces on Blanchard's theory. He had no interest in scientifically investigating Blanchard's theory; at this point, he already believed it to be true because of what he had learned from the scientific literature, from colleagues, and from his prior experiences. Using stories in this way is not science—it doesn't even rise to the level of *bad* science, because it doesn't even pretend to test or develop a theory—and I think it is clear it does not rise to the level of IRB-qualified *research* by the U.S. federal definition. (Dreger 2008a:402)

Because Bailey's book could not be considered research, he could not and did not violate professional ethical standards, according to Dreger. Accordingly, she asserted that Bailey could not have had sex with a research participant simply because he was not conducting research. Dreger added that sex with a research subject is not inherently unethical and confessed to having frequent sex with one of her own: her husband (Dreger 2008a). Dreger's

reputation as a bioethicist and historian lent authority to her conclusions. Dreger upheld the dominance of institutional authority and expertise over emotional responses from within the transgender community. She valued the epistemological position of the scholar as more legitimate than the subjectivity of the subject.

Regarding Bailey's exploitation of his subjects, Dreger concluded that these women must have known how Bailey would write about them due to their continued contact with him through the years. Dreger did chide Bailey for writing insensitively and disparagingly about transgender people. She faulted Bailey for letting Kieltyka believe she could convince him of an alternative interpretation of her experiences that did not signify autogynophilia. But overall, Dreger empathized with Bailey, remarking that scholarship would cease if researchers "were only ever able to write about people exactly according to how they wish to be portrayed" (2008a:409). For her, research subjects can actually impede the production of knowledge.

Dreger's decision to seek "the truth" about the controversy reveals several important themes related to the production of knowledge. First, she believes an investigation is capable of locating the truth of the muddled drama, and that she—an esteemed academic—is able to reveal it. Her assumptions expose the privilege that academics enjoy as producers of knowledge. As a scholar, Dreger had the power and authority to conduct this truth-seeking and publish her findings in an academic journal. In addition, it did not matter to Dreger that she was unable to dialogue with the central trans women in the debate and thus analyzed evidence that was not balanced evenly among the people directly involved. Even though Conway, James, and McCloskey had academic credentials, their refusal to work with Dreger did not prevent her from declaring findings. Rather than acknowledging the serious limitation of unbalanced perspectives, Dreger confidently drew conclusions about the controversy, prioritizing the perspectives of cisgender academics over those of the incensed transgender community.

Dreger believed that her investigation was a thorough, comprehensive, and scholarly exegesis that evaluated Bailey's actions

accurately. She hoped it would assuage hurt feelings and lay the issue to rest (Dreger 2008a). But Dreger's conclusions were not received well by all. Although she presented her analysis as an objective history, many critics disagreed. This time, however, they had the opportunity to publish their opinions alongside her article.

The 23 commentaries published in the *Archives* included a variety of perspectives. A handful of authors directed their critiques at Bailey's arguments, charging him with transphobia, and contextualizing his book within a history of oppression (e.g., Bettcher 2008; Gagnon 2008; Nichols 2008; Rind 2008; Serano 2008; Windsor 2008). A few authors supported Bailey (e.g., Blanchard 2008; Lawrence 2008; Roberts 2008) by ushering in more evidence. Some sexologists used the forum to promote their theoretical frameworks; this included Blanchard (2008), who presented and then refuted his interpretation of the feminine essence theory. Esteemed clinician Richard Green (2008) dismissed transgender women's outrage as irrational in an essay revealingly titled, "Lighten Up, Ladies." Anne Lawrence (2008), a transgender woman scientist thought of by some as a traitor to her community (e.g., Allison 1998; Conway 2011; Holmes 2000), suggested that transgender women's anger toward Bailey could be understood as narcissistic rage and argued that trans women are at increased risk for such disorders. These exchanges highlighted tensions between expert scientists and trans community members. The perspective of Lawrence, who straddled both communities as gender scientist and transsexual woman, blurred the boundary between knower and known. Other commentaries supported the trans community in influential ways, as academics advocating on behalf of trans people (e.g., Barres 2008; Bettcher 2008; Gagnon 2008; Meana 2008; Moser 2008; Serano 2008).

Most commentaries, however, addressed Dreger, and the majority of these authors believed Dreger's account was imbalanced and biased. Only a few found her coverage unbiased (e.g., Caretto 2008; Green 2008) and accurate (e.g., Gladue 2008). Overall, contributors believed the controversy had significant implications. Some worried that critiques within the controversy could infringe upon academic freedom (e.g., Rind 2008)

and even increase IRB regulation of research (Gladue 2008). But some noted that academic freedom does not preclude the need for academic responsibility (e.g., Serano 2008; Windsor 2008). Others hoped the controversy would ignite more open (e.g., Meana 2008) and scholarly (e.g., Bancroft 2008; Green 2008; Rosenmann and Safir 2008) dialogue. Several commentaries argued that Bailey's version of scientific evidence threatened the wellbeing of the transgender community (e.g., Barres 2008; Lane 2008; Mathy 2008; McCloskey 2008). A few scholars stressed the importance of treating marginalized communities with sensitivity (Lawrence 2008), especially concerning language (Bancroft 2008; Moser 2008). But only one commentary (Lane 2008) offered feasible solutions for quelling the debate, including apologies from both sides. Of course, Dreger had the power to respond to her critics—a final adjudication. Ultimately, she simplified or dismissed most of the critiques as flawed, and acknowledged just a few important insights (see Dreger 2008b). These mixed reactions illustrate the varied contentions surrounding scholarship of sensitive issues related to marginalized communities.

In general, the words of Dreger and Bailey are telling; both believe in the mission of science above all else. They privilege the authority of scientific truth over emphatic disagreement from the people to whom these “truths” refer. Dreger's impression of Bailey reveals a paternalistic view that “truthful” science will actually benefit those trans people who vehemently oppose it:

He clearly puts the value of truth-seeking and truth-telling over the value of the complicated relationships among sex researchers, gender clinicians, and trans people—complicated (even tangled) relationships he sees as having perpetuated the universalizing of the feminine essence narrative at the exclusion of reality. He argues that speaking the truth will help trans people more in the long run, even if it hurts in the short run. (Dreger 2008a:414)

In Bailey's own words:



It is almost always better (in terms of having a positive effect) to know and speak the truth than it is to believe and speak something that is untrue, even if the former upsets people more than the latter. Furthermore, I have profound skepticism regarding claims that X should not be studied or said because it is dangerous, harmful, or hurtful to do so. (Bailey 2007, quoted in Dreger 2008a:414)

For Bailey, the authority and responsibility of speaking the truth rests with the scientist. In his view, the studied populations—even individuals with their own scientific credentials—are effectively lying if they disagree with research findings. Yet Bailey's commitment to the labels of "science" and "truth" was dodged when people complained about scientific misconduct.

The broader effects of the second wave of the Bailey controversy were limited. Dreger's article did not provoke mass attention like Bailey's book. Most responses occurred within academia.<sup>5</sup> The published commentaries appeared to suffice for public dialogue, and people seemed ready to move on. And around this time, transgender people who were interested in psychomedical issues redirected their energy toward the American Psychiatric Association's Sexual and Gender Identity Disorders Work Group for the forthcoming edition of the *Diagnostic and Statistical Manual of Mental Disorders* (American Psychiatric Association 2008; Winters 2008). Tasked with revisiting the highly contested classification of Gender Identity Disorder, opponents of transgender pathologization turned their attention to this issue.

### **Producing Transgender Knowledge**

Now that the drama has unfolded, quite likely to its end, scholars can reflect on its implications. This section discusses several lessons from the Bailey controversy. First, I discuss how insider/outsider positionalities affect the production of knowledge. Then I emphasize the relevance of sociopolitical and historical context in conducting research with marginalized groups. I also illustrate

how the controversy offers an opportunity to further develop transgender knowledge for critical social researchers. I conclude by suggesting specific empirical and theoretical approaches, data collection and analysis techniques, and strategies for dealing with adversarial responses.

The Bailey controversy reflects a longstanding debate within social sciences: the question of insider/outsider researcher positionality. The practical application of positionality in research has not yet been mastered, as one current call for papers states: “further attention [is] required as to what constitutes best practice in terms of qualitative and quantitative research” (Moore, Riggs, and Rinaldi 2012). The Bailey controversy reminds scholars how “outsider” cisgender researchers might be perceived by transgender people, especially when they publish contestable research. But insider/outsider dividing lines may become blurred. Indeed, Bailey advocated for certain transgender rights in his work even though he does not belong to the LGBTQ community (Bailey 2003). That his work also provoked adversarial responses, however, suggests that a researcher’s political standpoint is insufficient. And with increasing visibility of scholars who are transgender- or LGBTQ-identified, or closely allied family, friends, and colleagues, the insider/outsider boundary may overemphasize a false division between “us” and “them.” Debates over credible scholarship, epistemological authority, academic integrity, and injustice suggest that knowledge about transgender identity, experience, and subjectivity is highly contested and contestable. In addition, the divergent perspectives among different ontological communities—disagreements between academics, disagreements between transgender people, and disagreements between academics who are also transgender—complicate the debate. The Bailey controversy reminds scholars that questions remain concerning which positions are most credible in determining both the ways of knowing and what becomes known.

A related point to keep in mind, especially when working with marginalized populations, is the need for understanding of the sociopolitical and historical context of research. In Bailey’s case, the backlash emerged after decades of oppressive sexological research. The fierceness of trans women’s responses was not just

about Bailey or his book. Transsexuals were fighting back against a legacy of pathologizing psychomedical traditions wherein the colonization of transsexual bodies was commonplace (Serano 2007). Transgender women had tired of clinical researchers studying them with little care for understanding transsexuality outside of finding a cause and a cure (see Figure 5). Researchers must pay attention to how such histories may inform reactions to their inquiries and interpretations.



**Figure 5.** “Guerilla Attack.” KIELTYKA’S (2003b) DEPICTION OF TRANSEXUAL RESEARCH PARTICIPANTS FIGHTING BACK AGAINST BAILEY

The Bailey controversy may provide an unintended opportunity to further develop transgender knowledge for critical social researchers. According to Dreger (2008a), the controversy affected the climate of clinical research. She reported that “many sex researchers” told her they would avoid future transgender studies, fearing that transsexuals have become “marked by researchers as being too unstable and dangerous to bother with” (2008a:413).<sup>6</sup> The presumed hesitations of sexologists<sup>7</sup> present an important opportunity for more conscientious social researchers. Critical social theorists and researchers within disciplines such as sociology, anthropology, women’s and gender studies, and cultural studies can pick up the slack that sexologists may have abandoned. To date, most contemporary scholars in these areas who study transgender issues have avoided national backlash. Although social researchers have erred in representations of transgender subjectivities,<sup>8</sup> we might be in a better epistemological position to avoid substantial opposition from the transgender community. Social researchers are less interested in treating transsexuals than in understanding their experiences within those institutions that confer treatment. And many sociologists are interested in social inequality, a foundation that lends itself to eliminating transgender oppression. In addition, poststructural theorizing to decenter the subject has prompted investigation into previously unmarked social categories. Queer theory has helped scholars deconstruct all genders and sexualities, not just those considered deviant (Corber and Valocchi 2003; Fuss 1991; Jagose 1996), and practical methodological guidelines for deconstructing power are also useful.<sup>9</sup> In practice, scholars can complement standard literature reviews by paying attention to community responses to this literature. We can evaluate the numerous popular weblogs and internet forums where community members weigh in on the thoughts of “experts” and thereby infuse scholarly knowledge with community critiques. These epistemological lenses offer opportunities to produce transgender knowledge that is less pathologized than what emerges from clinical studies.

Thoughtfully framing topics connects to study design. Sociology’s empirical attention to social problems is an excellent frame-

work within which to examine how transgender people experience inequality. Although some work in this area has emerged, more research on institutional discrimination against transgender people is needed. Scholars can study transgender inequality in a variety of settings, such as law, education, work, housing, healthcare, religion, sport, prison, and media. Studying interactional issues, such as transgender partnering and parenting, represents another important area of inquiry. Topics like these recognize transgender disempowerment as systematic and move away from tokenizing transsexuals as living proof of gender theory. Consequently, the knowledge that we would produce would enrich our understanding of systematic discrimination as a whole.

Another research design strategy involves attention to the *theoretical* frameworks of research. One major theoretical topic of interest for sociologists is that of identity formation. Researchers can understand transgender identity formation differently than clinical sexologists who pore over the etiology of transsexuality (e.g., Bolin 1988; Cromwell 1999; Devor 1997; Rubin 2003; Valentine 2007). We can interrogate the discord between psychological theories and transgender lived experiences. We can compare contemporary transgender identities with cross-cultural and historical evidence of gender diversity with attention to sociocultural meanings, politics, and technologies that enable postmodern transgender manifestations. We can question how existing theories of sexuality and gender affect the kinds of transgender narratives we do and do not hear. We can also deconstruct these theoretical models, forging new frameworks that do not pathologize gender difference.

In this way, scholars can consider subjectivities that examine both cisgender and transgender identity. By asking cisgender people the same questions typically posed only to transgender people, scholars can expand the study of sexuality and gender and deconstruct their taken for granted assumptions. For example, how does a sense of inner gender identity matter for cisgender people? What does it mean for normative men and women to explain their gendered body modifications as natural when their masculinities and femininities are purposefully constructed and maintained? How does cisgender gendered embodiment re-

late to sexuality? Instead of narrowly defining transgender people as reifying or transcending the gender binary, we can hold cisgender people just as accountable for gender norms and violations of these norms. Moser's (2009) study of autogynephilia—a psychiatric disorder label reserved for trans women—in cisgender women is a salient example of deconstructing cisgender subjectivity. Such orientations facilitate empirical work that affirms transgender experiences and shifts critical attention to the dominant groups that have higher stakes in maintaining these boundaries.

After designing research, scholars need to pay attention to how histories of oppression may lead to difficulty in *finding* willing research participants. Because sociological research may be conceptually inseparable from clinical research for prospective respondents, people alienated by psychomedical research may be inclined to distrust all researchers' motives. A refusal to participate in research is one way for oppressed groups to deploy agency in an oppressive context. It is therefore crucial for researchers to think through how we will recruit people and collect data.

As we analyze data, it becomes important to account for how study participants give meaning to their own lived experiences. We can use member-checking strategies to compare our interpretations with those of the data producers (Erlandson et al.1993; Lincoln and Guba 1985). We can share our analyses with research participants, asking them to respond to anything they find inaccurate or disagreeable. By actively involving the researched into the research process, the production of knowledge becomes more collaborative. The research becomes enriched through continuous dialogue between scholars and informants, and the research participants may feel more heard. Although more time-consuming, this relationship is less exploitative than the linear model used by many scientists who collect data then analyze it without returning to the original sources. If we foreground the experiences of the people we study, we can produce knowledge that privileges the expertise of the people who are studied.

And when challenged by informants, scholars need to carefully consider their critiques and evaluate how and why we arrived at different understandings. Divergent interpretations of

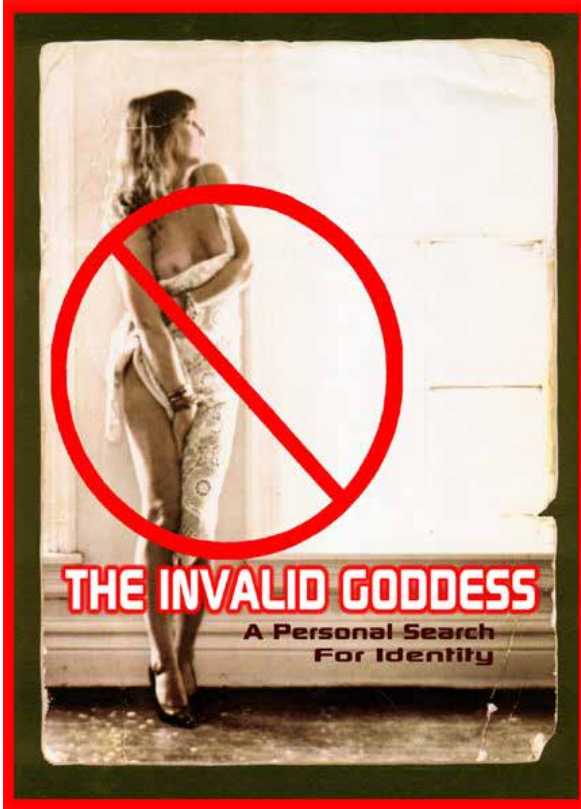
data do not necessarily represent a methodological impasse. As feminists have argued, lived experiences of marginalized communities can substantially contribute to our studies (Smith 1974; Collins 1990). These inclusions are an important part of the production of knowledge, and scholars have a responsibility to resolve or at least address these conflicts. The goal in research is not to avoid all criticism; however, it is important for researchers to reflect on critiques as they progress through analysis. If research controversies arise, scholars should respond to critiques while remaining conscious of the privileges we enjoy as scientific producers of knowledge. This attention is a crucial, but sometimes overlooked, aspect of academic integrity. Minimally, researchers can acknowledge conflicts in their publications, as Rubin (2003) did in his book about transgender men wherein he discloses that several participants dropped out of his study for disagreeing with his framework. This brief admission is an example of a more honest scholarship that exposes power dynamics.

In addition to reporting epistemological conflicts, researchers can publish separate methodological articles that reflect on the conflict.<sup>10</sup> We can discuss our methodological challenges and ways we dealt with them, even including commentary from displeased respondents. We can also create forums—such as weblogs, internet listservs, and conference panels—where critics can openly disagree with researchers' findings, and where scholars can engage with these critiques. We can organize author-meets-critics sessions where critics are not just other congenial scholars, but also include members from the community which the researcher studied. These endeavors might balance out power in the production of knowledge to include more perspectives from dissidents. In the end, researchers can accept dissent as indicative of postmodern possibilities for multiple truths in the production of knowledge.

## Conclusion

The Bailey controversy highlights important issues related to the production of knowledge. It demonstrates the power of distinguished scholars to publish inflammatory generalizations

about an entire community of marginalized people. Although Bailey faced tremendous scrutiny for his book, his role as an expert scientist gave his arguments legitimacy. Bailey produced knowledge; he was able to speak “the truth,” as he saw it.



**Figure 6:** As an invited guest speaker over a period of 10 years, Kieltyka showed this image among others to Bailey’s human sexuality class. “This self-portrait is the first in a series of photographs titled: ‘The Invalid Goddess’ where I try to find a balanced integration of masculinity within a feminized form and identity as a lesbian transsexual woman. These photos were influenced by and a direct response to photographs of ‘sexual variants/freaks’ by Diane Arbus and Robert Mapplethorpe and the clinical case study photographs of Dr. John Money” (Kieltyka 2012, personal email communication). She did not know how Bailey would ultimately ignore and pervert the way she interpreted her own experiences.



Despite this privileging of scientific truth, marginalized communities are not silenced. They can actively oppose the science, attacking it from any direction they see fit to expose its distortions. Indeed, they can resist this authority and offer their own interpretations of their lived experiences (see Figure 6). Although their accounts may not benefit from the stamp of scientific authority, they are able to present another version of the truth and critique the production of knowledge. By belonging to the group that becomes “known” through science, they produce another expertise: the lived experience.

Although I have offered suggestions for improving the production of transgender knowledge, sociology has a long way to go to support transgender scholarship. Recent reports suggest that studying sexuality and gender is still considered strange or overly specialist by some mainstream sociologists (Schilt 2008). Sociologists who research transgender topics often relay stories about being treated by colleagues as studying “freak” sociology. Unfortunately, cisgender researchers in trans studies may have advantages over trans scholars. In the 2009 *Report on the Status of GLBT Persons in Sociology*, transgender-identified scholar Raine Dozier (2009) relayed an exchange that occurred while interviewing for a job:

[The interviewer] confided, “We really need someone to teach sexuality, but we don’t advertise because if we do, every tranny out there applies.” I was momentarily speechless as I scrambled for a response fitting a job candidate. In the silence, he again solicited a response, “I mean every tranny will apply.” Two things were immediately clear: he hadn’t read my work and I wouldn’t be invited for an on-campus interview. (P. 17-18)

Aside from challenging the overt transphobia evident in this interviewer’s comment, the discipline of sociology must learn to accept transgender scholarship as legitimate and treat empirical studies of transgender lives seriously.

In sum, the Bailey controversy highlights the contentions inherent in producing transgender scholarship. It offers a pivotal example in considering different ways of knowing. The controversy should inspire a sharp awareness that, as scholars of sexuality and gender, we are always writing about *people* (see Figure 7). From our research proposals to our published articles, we need to think carefully about our representations. We can rethink assumptions about transsexuality pervasive in the madness of clinical lore. Most importantly, if we reflexively consider the impact of our research, we can hinder further oppression of transgender people within academia. This ethical obligation infuses—and invigorates—the production of knowledge.



Figure 7. “Stop the Madness.” Kieltyka’s (2003c) depiction of the future of transgender research

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## Notes

1 Regarding the controversy examined in this article, note that Bailey wrote letters of support for trans people pursuing surgery (Dreger 2008a) and so occupied the role of gatekeeper for some of his informants who may have viewed him, a psychological researcher, as a powerful aid in realizing their ideal bodies, and may have told him what they thought he wanted to hear.

2 As this article challenges sociologists to consider multiple voices in scholarship, especially when working with marginalized communities, I relay part of the graphic narrative produced by a trans woman who was central to the Bailey controversy, Anjelica Kieltyka.

3 Now the World Professional Association for Transgender Health.

4 Her reasoning can be found in the original Dreger (2008) account.

5 For example, review the 2008 presentations at the National Women's Studies Association in "The Bailey Brouhaha: Community Members Speak Out on Resisting Transphobia and Sexism in Academia and Beyond" at [http://ai.eecs.umich.edu/people/conway/TS/News/US/NWSA/NWSA\\_panel\\_on\\_resisting\\_transphobia\\_in\\_academia.html](http://ai.eecs.umich.edu/people/conway/TS/News/US/NWSA/NWSA_panel_on_resisting_transphobia_in_academia.html).

6 This reaction suggests that the pushback initiated by Conway, James, McCloskey, and Kieltyka was successful. If sex researchers who would presumably contribute to the continued pathologization of trans people now fear the reactions they might encounter, then the resistance to Bailey effectively halted the production of more pathologizing "scientific" productions.

7 For examples of more critical sexology, see: Moser, Charles and Peggy J. Kleinplatz. 2005. "Does Heterosexuality Belong in the DSM?" *Lesbian & Gay Psychology Review* 6(3):261-7; Moser, Charles and Peggy J. Kleinplatz. 2005. "DSM-IV-TR and the Paraphilias: An Argument for Removal." *Journal of Psychology and Human Sexuality* 17(3/4): 91-109.

8 See Serano's critique (2007), especially pages 139-55.

9 For example, see: Browne, Kath and Catherine J. Nash. 2010. *Queer Methods and Methodologies: Intersecting Queer Theories and Social Science Research*. Burlington, VT: Ashgate.

10 For example, see: Luff, Donna. 1999. "Dialogue across the Divides: 'Moments of Rapport' and Power in Feminist Research with Anti-Feminist Women." *Sociology* 33(4):687-703.

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## MARITAL WARRIORS? PRODUCING KNOWLEDGE TO DEFLECT CONTROVERSY IN MARRIAGE PROMOTION EFFORTS

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Rising in the 1990s, symbolic contests over marriage have become a national preoccupation in the United States. With the objective of renewing a marriage culture, marriage promotion efforts—in tandem with battles over the issue of same-sex marriage—appear to participate in the “culture wars,” a term referring to national conflicts over cultural issues like family transformation, abortion, religion in schools, and acceptance of lesbians and gay men. In this article, I examine the knowledge-shaping processes of elite actors in the national marriage movement who draw on what I call an “epistemology of marriage”—a system of knowing that maintains its power by tapping into unmarked assumptions concerning the heterosexual nuclear family. I argue that this epistemology has legitimated and depoliticized the potentially contentious issue of marriage promotion. Drawing on critical heterosexuality studies and cognitive sociology, I analyze these knowledge-shaping processes as a way for elite actors who hold influential ideas, knowledge, and ideologies to deflect contention. In the case of marriage promotion, knowledge elites perform boundary work based on marked categories of homosexuality and same-sex marriage that allows heterosexual marriage to maintain its position as natural and unquestioned. First, these actors establish common ground in their use of social scientific “facts” to justify the idea that heterosexual marriage is the best institution to strengthen American society. Second, knowledge producers rely on commonsense understandings of contentious issues whose power rests on the unmarked nature of this knowledge—the idea that the heterosexual, nuclear family is the “natural” family form.

**R**ising in the 1990s, symbolic contests over marriage have become a national preoccupation in the United States, with debates over same-sex marriage and the political meaning of sexual orientation a central issue. In addition, a grassroots national marriage movement was born in 2000. Its founding “statement of

principles” was signed by 113 supporters, including prominent sociologists and scholars Don S. Browning, William Doherty, Jean Bethke Elshtain, Amitai Etzioni, William Galston, Norval Glenn, Steven L. Nock, David Popenoe, Linda J. Waite, Judith Wallerstein, Barbara Dafoe Whitehead, and James Q. Wilson. Its goal: “We call upon America’s civic, political, moral, religious, professional, policy making, and intellectual leaders to join with us in the great task of renewing a marriage culture” (CMFCE, IAV, and RCFP 2000:19).

The objective of marriage renewal has become a broad policy pursuit in the United States, with efforts beginning under the George W. Bush administration to promote marriage as the most important solution to various social problems, including poverty, crime, and youth delinquency. In recent years, the focus of the movement has been on strengthening marriages through educational programs. A group of elite actors from a variety of professional backgrounds, including think tank researchers, academics, clergy and lay ministers, welfare bureaucrats, and marriage counselors and therapists have influenced the institutionalization of marriage promotion programs in the United States. Elite actors maintain unequal access to resources in relation to economic, social, cultural, political, and/or knowledge capital (Khan 2012). Marriage promotion elites have drawn on their social, political, and knowledge capital to argue in a variety of political arenas for the importance of promoting marriage. For example, the following high-profile think tank staff and founders have presented testimony during hearings on welfare and marriage policy to the U.S. Senate and Congress in connection to funding marriage promotion programs: Patrick Fagan, former senior fellow, Heritage Foundation; Robert Rector, senior fellow, Heritage Foundation; Michael J. McManus, founder of Marriage Savers; Maggie Gallagher, founder and president of the Institute for Marriage and Public Policy; Ron Haskins, senior fellow at the Brookings Institute; and Theodora Ooms, former senior analyst at the Center for Law and Social Policy.

With the objective of reinvigorating a marriage culture in the United States, the marriage movement—in tandem with battles over the issue of same-sex marriage—appears to participate in

the “culture wars,” a term introduced in the early 1990s to refer to national conflicts over cultural issues like family transformation, abortion, religion in schools, and acceptance of lesbians and gay men. Sociologist James Davison Hunter (1991, 1994) theorized the culture wars as bringing together groups of knowledge workers who seek to impose their rival visions of social reality—and their idea of how things ought to be—on the rest of society. Hunter argued that the elites were forming new competing and polarized alliances based on their approach to religious, social, and political issues from an orthodox or progressive standpoint. Hunter would likely assess elites who seek to promote marriage as acting based on a sense of orthodoxy in matters of sexual morality and traditional family values.

Scholars have criticized the culture wars thesis, particularly concerning the question of whether the American public has become more polarized over social issues than it was fifty years ago (e.g., DiMaggio, Evans, and Bryson 1996). Yet, from a sociology of knowledge perspective, many of these critiques ignore a broader question regarding how elites construct knowledge of cultural issues to reach an intended (or unintended) audience and to influence politics and public policy. Hunter theorized that there are two worldviews: the orthodox, based on commitment to a transcendent being, and a progressive worldview that filters values according to shared cultural assumptions. While Hunter recognizes that there are numerous standpoints between the two polarized worldviews, he argues that elites involved in these battles share one or the other moral orientation. In this article, I argue that Hunter’s characterization of the culture wars as comprising two opposite poles of knowledge does not attend sufficiently to what Berger and Luckmann (1966) have theorized as the relevance structures that shape worldviews according to the ways that “perception and imperception, and attention and disattention are tied closely to social location” (Brekhus 2007:452).

Using the case of marriage promotion as an example, this article draws on cognitive sociology and critical heterosexuality studies to analyze the knowledge-shaping processes used by elite actors to influence general understandings of culturally contentious issues (Bonds 2011). I seek to clarify how knowledge producers

exercise their influence on what counts as knowledge based on *social markedness*, knowledge that conveys special interest, and *social unmarkedness*, knowledge that is ordinary and commonplace (Brekhus 2007). In particular, I examine the knowledge-shaping processes of elite actors in the national marriage movement who draw on what I call an “epistemology of marriage”—a system of knowing that maintains its power by tapping into unmarked assumptions concerning the heterosexual nuclear family. These knowledge producers share an epistemology that has legitimated and depoliticized the potentially contentious issue of marriage promotion. I address the ways that cultural battles over marriage’s significance in society depend on preserving a relationship between marked and unmarked categories that renders heterosexuality invisible and beyond question.

### **The Knowledge-Shaping Practices of Elite Actors**

Drawing on the work of Antonio Gramsci, sociologist James Davison Hunter (1991, 1994) theorized that elite knowledge producers—those in a position of disproportionate power to disseminate society’s dominant ideas and beliefs—have been key players in the creation of cultural conflict in the United States. Hunter sought to uncover how some ideas or knowledge claims become more plausible than others (Lucke 2007). He argued that below the surface of public disputes about cultural transformations in sexuality are “fundamentally different conceptions of moral authority,” the knowledge base by which people decide what is right or wrong (Hunter 1991:49). Thus, according to Hunter, knowledge producers generally cluster around two poles: the orthodox (conservative Protestants, conservative Roman Catholics, and Orthodox Jews), and the progressives (liberal Protestants, liberal Roman Catholics, Reform Jews, and secularists).

Hunter’s assessment of the important role that knowledge elites play in societies today reflects broader theoretical conversations in the sociology of knowledge. In recent years, scholars have theorized the ways that knowledge itself is productive in postindustrial societies in a manner similar to that of capital and labor in the industrial period (Zammito 2007). This has involved

a move from an economy based primarily on the physical labor needed to extract natural resources to a knowledge society, where importance is placed on intellectual assets and an economy driven by knowledge-intensive activities that contribute to an accelerated pace of technical and scientific advance (Powell and Snellman 2004). Hunter notes that public discourse today is largely dominated by elites who are not necessarily situated in academic institutions but are more influentially placed in public positions, such as public policy specialists located in think tanks. Work in the “new” sociology of ideas similarly focuses on specialist knowledge producers in the areas of science, morality, culture, or politics who are located in universities and other public and private settings (Camic and Gross 2000). For elite knowledge producers, the importance of gaining intellectual legitimacy and recognition has “significant effects on the ideas that these actors produce and on the fate of the ideas they generate” (Camic and Gross 2000:248).

Scholars have widely criticized the culture wars thesis regarding the question of how far reaching are the divisions among Americans. Studies have shown that Americans are closer in attitudes and opinions than Hunter’s polarization thesis suggests. While Americans tend to be divided along cultural, religious, and political lines, these divisions are diffused rather than clustering around two polar opposites (Demarath and Yang 1997; Uecker and Lucke 2011). In contrast, scholarship finds that American political and religious *elites* are becoming more polarized (Fiorina and Abrams 2008; Fischer and Mattson 2009; Uecker and Lucke 2011). But this body of scholarship has focused predominantly on religious ideology and not on broader questions of how knowledge is constructed in relation to contentious cultural battles. In particular, the new sociology of ideas framework suggests that the importance of achieving legitimacy in a particular field would motivate knowledge producers to seek validity for their beliefs in arenas other than solely in the realm of religion and morality. I have analyzed, for example, the mechanisms that are important in creating “epistemic cultures” (the practices and beliefs that influence the ways a culture justifies its knowledge claims) as a means to influence public policy (Heath 2012a). One of these

mechanisms involves “epistemic communities” or social networks of experts to establish competence in a particular domain and claim policy-relevant knowledge (Haas 1992). The production of such knowledge may have a significant impact on the ways that cultural contests play out.

Scholars have pointed to the need for more research in the realm of the new sociology of ideas on how scientific (and social scientific) ideas move across disciplinary boundaries into nonacademic settings (Vaughn 2006). How do elites exercise power to suppress, dispute, produce, and administer particular social scientific knowledges as they seek to gain a wider audience outside of academia? This article proceeds in the following manner. First, I outline the ways that hierarchical boundaries mark some knowledge as in need of special scrutiny, while relying on unmarked knowledges that treat other categories as commonplace and unremarkable. Next, I assess how elite actors draw on social scientific “facts” to make knowledge claims as a way to deflect controversy. Finally, I analyze how these facts rely on unmarked knowledge concerning the heterosexual, nuclear family as the “natural” family form. This process of making knowledge claims that rely on unmarked knowledge about heterosexuality, I argue, has been a key tool of elite actors who seek to promote marriage as a policy beyond contention.

### **Boundary Work, Unmarked Knowledge, and Heterosexuality**

Within the field of science, efforts are made to distinguish experts from non-experts by delineating the boundaries of “real” science. Gieryn (1999) coined the term “boundary work” to illuminate the ways that scientists establish epistemic authority by means of attributing selected qualities to what counts as credible scientific doctrine, methods, and claims. The concept of boundary work focuses attention on how knowledge can act as a means of social control to sanction activities that fall outside the legitimate boundary of science. Moving the idea of boundary work to other areas of social scientific interest, Lamont and Molnar review the work of cultural sociologists who study it in terms of “typification systems or inferences concerning similarities and

differences” (2002:171) that facilitate an institutionalized definition of membership. Research on boundary work has shown that the political dimensions of knowledge production are best elucidated in the context of controversy, where the boundary issues between knowledge, politics, and policy are contested and visible rather in the background and invisible (Binder 2004; Jasanoff 1996, 2005; Vaughn 2006).

In thinking about cultural conflict, the emerging field of cognitive sociology shines a light on the importance of cognition in boundary work that is subject to ongoing negotiation and struggle (Fuller 2003; Lamont 1992; Laqueur 1990; Nippert-Eng 1996; Zerubavel 1997). By examining the socio-cultural components of discrimination and classification, and the creation of what Zerubavel (1991:21) has called “islands of meaning” that involve processes of grouping items into mental clusters (see also Cerulo 2002), cognitive sociologists have shown how boundaries can be highly contested and facilitate struggles over social relations in general. Cognitive sociologists have studied the boundaries between social *markedness* and its parallel, social *unmarkedness*, to illuminate the cultural distinction between the ordinary (the semiotically unmarked) and the special (the semiotically marked) (Brekhus 1998; Zerubavel 1997).

Scholarship in recent years has turned a critical eye on unmarked categories—including heterosexuality, masculinity, and whiteness—that assume a normative and unremarkable character in everyday life. Sexuality scholars in the late 1990s conceptualized the field of critical heterosexual studies as an important alternative to the once dominant deviance model for studying sexuality (Ingraham 1999, 2005). While theoretical frameworks such as labeling theory shed light on the nominal construction of “the homosexual” and its relation to determining “normal” and “deviant” sexuality (see McIntosh 1968), these approaches have often failed to elucidate the systems of knowledge that produce heterosexuality and its dominance in relation to other sexualities (Namaste 1994; Stein and Plummer 1994). Critical heterosexuality studies derives from feminist theories of the 1970s that challenged the idea that men and women constitute categories of people who are “naturally” sexually attracted to the “opposite”



gender.<sup>1</sup> Building on these theories, the critical study of heterosexuality calls into question taken-for-granted understandings of heterosexuality as coherent, and investigates its multiplicity of meanings, institutional arrangements, and hierarchies.

The concepts of *markedness* and *unmarkedness* help to elucidate the relationship between knowledges that have an explicit social value as either positive or negative, and the unmarked that is tacitly seen as neutral or commonplace. Historical processes and national identities shape these binaries. For example, Jonathan Ned Katz (1996) offered historical perspective on the emergence of the concept of heterosexuality from the domain of the nineteenth-century medical world into the common parlance. By the end of the 1920s, “the heterosexual” had become part of dominant culture, in tandem with the public entrance of the concept of “the homosexual.” As the concept of heterosexuality became the “normal” and dominant category of sexual identity and development, it eventually receded into the background, and the marked category of homosexuality became something to scrutinize and control.

Beginning in the late 1990s, knowledge elites began to promote marriage, relying on boundary work that assumes heterosexual marriage is natural and unquestioned. These actors draw on social scientific studies of heterosexual marriage, based on a hierarchy of sexualities that is implicit to the construction of abnormal and deviant forms (Rubin 1984). That is, promoting heterosexual marriage relies on boundary work that positions the “normal” in relation to the “abnormal.” Efforts to promote marriage draw together an array of knowledge producers, including academics, practitioners (therapists, counselors, marriage educators), welfare bureaucrats, clergy and lay ministers, politicians, as well as community activists who view the institution of heterosexual marriage to be the answer to a range of social problems. Elsewhere, I have addressed the social consequences of marriage promotion efforts in creating and maintaining social inequalities (Heath 2012b). In this paper I analyze the ways that knowledge elites are able to deflect controversy through boundary work, thus contributing to the production of inequality.

## Deploying Social Scientific Knowledge to Deflect Controversy

In the past fifty years, a substantial body of sociological research has examined the changing nature of the heterosexual family in the United States—in marriage and divorce rates, cohabitation, childbearing, sexual behavior, and women’s work outside the home. Transformations in family took center stage in the political culture of the 1970s as a result of the growth of the women’s movement, the rise of non-marital childbearing, debates over the African-American family, and the rise of the religious right in the United States (Fetner 2008; Freedman 2002; Moynihan 1965). After Democrat Bill Clinton’s presidential inauguration in 1992, many thought that the predominance of family-values ideology would subside. Instead, Judith Stacey described the rise in the 1990s of a “neo-family-values campaign” that embraced “an explicitly centrist politics, rhetoric, and ideology,” grounded its claims “in secular social science instead of religious authority,” and rejected “anti-feminism for a post-feminist ethic” (Stacey 1996:54).

By the turn of the 21<sup>st</sup> century, this campaign had mobilized into the self-identified “marriage movement,” uniting academic and non-academic actors to promote a “renaissance” for heterosexual marriage (IAV 2004:17). Specifically geared towards a knowledge society (Powell and Snellman 2004), the marriage movement has involved a network of policy-oriented and scholarly organizations, including the Institute for American Values, with David Blankenhorn—author of *Fatherless America* (1995)—as president; the National Marriage Project, a research and public education initiative once based at Rutgers University and originally co-directed by David Popenoe, Professor of Sociology Emeritus at Rutgers; and Barbara Dafoe Whitehead, a journalist. Since 2009, the National Marriage Project has been housed at the University of Virginia under the direction of sociologist W. Bradford Wilcox. Other organizations and groups have a specifically Christian orientation: for example, Marriage Savers, whose goal is to help churches and communities reduce the prevalence of divorce and raise their marriage rate. Though diverse, elites from these organizations and think tanks share a common language

concerning the need to promote and strengthen marriage based on findings from research on the negative effects of divorce and the greater likelihood of disadvantage experienced by children raised by single parents.

The federal government also embraced dominant ideas about the importance of marriage for society in prioritizing marriage strengthening and promotion in the welfare reform debates. The U.S. Congress passed the Personal Responsibility and Work Opportunity Reconciliation Act (PRWORA) in 1996 that overhauled the welfare system, turning it into a block grant to states. Three of the four declared purposes of the Temporary Assistance for Needy Families (TANF) law referred to promoting marriage and two-parent families and reducing non-marital births. Individual states, such as Oklahoma, allocated TANF dollars toward initiatives to promote and strengthen marriage (see Heath 2012b). During the George W. Bush administration, Wade Horn, the founder and director of the nonprofit National Fatherhood Initiative, became the Assistant Secretary for the Administration of Children and Families (ACF). In 2001, he made promoting and strengthening marriage one of nine ACF priorities and initiated the federal Healthy Marriage Initiative with funding of about \$200 million a year. The 2005 law reauthorizing welfare—the Deficit Reduction Act—included the Healthy Marriage and Responsible Fatherhood Act that established a new grant program to fund “healthy marriage” and “responsible fatherhood” programs. Federal grants under the Deficit Reduction Act that allocated \$500 million for marriage programs over five years designated the following as allowable activities: public advertising campaigns on the value of marriage; education in high schools on the value of marriage; marriage education for non-married expectant women and men, engaged couples, those interested in marriage, and married couples; divorce reduction programs; marriage mentoring programs; and programs to reduce the disincentives to marriage in means-tested programs (National Healthy Marriage Resource Center 2010). Funding for programs has meant substantial growth in activities across the nation to promote and strengthen marriage, and continued under the Obama administration when Congress

approved \$75 million of its proposed Fatherhood, Marriage, and Family Innovation Fund in 2011.

The idea of promoting marriage emerged as a contentious issue early on. As government programs to promote marriage grew across the nation, the media began to cover the controversy over whether policy should promote marriage to reduce divorce rates and non-marital childbearing. The idea that non-marital childbearing is a cause of poverty was central to the language in the 1996 welfare reform law that spells out how this problem bears the responsibility for “a crisis in our Nation” (in Hays 2003:17). Beginning in 2000, the media started to examine marriage promotion as a contentious issue, generally offering first the perspective of the proponents and then their critics’. For example, a lengthy article in the *New York Times* in 2000 recounted what states were doing to promote marriage, noting that the initiatives were attracting support not only from “family-values conservatives” but also from liberals (Belluck 2000). The article was largely supportive, offering several quotes from David Popenoe, who offered justification for marriage promotion efforts based on social scientific research: “Broken families were more likely to need public assistance and to lack health insurance than those that remained intact. The children of divorced parents are more prone to emotional problems that can lead to truancy, drug abuse, teenage pregnancy or juvenile delinquency.” A few paragraphs later, the article presented the view of Attorney General James E. Doyle of Wisconsin in critique of his state’s plans to implement marriage promotion policies: “The role of the state is fighting drug-trafficking and crime and having a good school system. The relationships within my family, that’s my business, not the government’s” (Belluck 2000). Analyzing archival materials ranging from the years 1990 to 2010, I found this pattern was repeated in a majority of articles that offered quotes from proponents as experts on statistics concerning “family breakdown,” and quotes from critics that largely focused on values and opinion rather than on social science.<sup>2</sup>

Judith Stacey (1996) details the important role that social scientists have played in shaping the field of marriage promotion and its knowledge claims. Norval Glenn, the late family sociolo-

gist at the University of Texas, delivered a series of public lectures in 1994 that were critical of the way family sociologists had portrayed the transformations of previous decades. He noted a tendency to downplay negative effects and to offer a “sanguine view of the family changes that started or accelerated in the mid-1960s,” then recounted his own process of coming to terms with the view that “the best family situation for children and adolescents is one in which there is a successful, intact marriage of the biological (or adoptive) parents” (Glenn 1994:2, 10). As Stacey described, Glenn’s narrative targeted the role of ideology (feminist and liberal) that he believed influenced scholars to give a less critical assessment of family transformation. Glenn then switched to an “objectivist” scientific narrative to account for the less sanguine conclusions that many social scientists now recognize. His words suggested that, objectively, heterosexual marriage is the best family situation compared to the feminist and liberal perspectives of supporting diverse families. For him, this latter perspective was fundamentally ideological. While there is substantial research pointing to advantages that children receive in some married, biological-parent families, social scientists do not agree on how to interpret these findings (Brown 2010; Cherlin 1999, 2004; McLanahan and Sandefur 2009). Moreover, there is no evidence to date showing that children of same-sex parents fare worse.<sup>3</sup>

These policy institutes and think tanks have used reports and fact sheets to marshal the power and credibility of science in support of the pro-marriage stance. In a 2002 document, the Institute for American Values spelled out “Why Marriage Matters: Twenty-Six Conclusions from the Social Sciences.” A sampling included: “Marriage is a virtually universal human institution; Marriage has important biosocial consequences for adults and children; Marriage reduces poverty and material hardship for disadvantaged women and their children” (IAV 2002:1-2). A fact sheet from the Institute for American Values stated: “America faces many urgent challenges. Crime. Poverty. Education. And many others. Each is important. But many leading scholars now conclude that our nation’s single most important problem is the weakening of marriage” (IAV 2006:1). Knowledge and evidence about the benefits

of marriage has been presented without contextualization of scholarly debates and complexities. In the case of the IAV fact sheet, for example, no evidence was given to substantiate the claim of general scholarly agreement concerning the weakening of marriage as the greatest social problem. Moreover, historians, anthropologists and sociologists are divided on these issues. A good number have called into question marriage's universality (see Coontz 2005). Likewise, scholars debate whether *marriage* itself can reduce poverty (see Avishai, Heath, and Randles 2012; Lichter, Graefe, and Brown 2004; Manning and Lichter 1996). Instead, these arguments simplify the facts and overstate unanimity.

Reports and fact sheets on the importance of marriage have been disseminated widely among grassroots actors and on websites as evidence of the need to promote it. One of the more prominent websites is the National Healthy Marriage Resource Center, funded with a grant from the Administration for Children and Families' Office of Family Assistance, which bills itself as "a clearinghouse for high quality, balanced, and timely information and resources on healthy marriage." Clicking on the prominent "Research & Policy" tab brings a "Featured Resources" webpage with links to the IAV report on "Why Marriage Matters," and to a report commissioned by the National Fatherhood Initiative, the Institute for Marriage and Public Policy, and the Institute for American Values on "Can Government Strengthen Marriage? Evidence from the Social Sciences," which offered the following summary:

Why should law and public policy support marriage? A large body of social science evidence confirms that marriage is a wealth-creating institution. Marriage changes the relationship between men, women, and their children in a way that leaves men, women, children, and society better off. These are not just "selection effects." The best evidence suggests that marriage itself makes a difference in both adult and child well-being. (Gallagher 2004a:6)

Similarly, Waite and Gallagher (2000), in their influential book that reviews the literature, concluded that the wealth-and health-creating aspects of marriage confirm the “case for marriage.” Yet, other scholars have shown that such claims overstate the relative benefits of marriage (see Musick and Bumpass 2012).

While this packaging of marriage promotion would seem to stoke the flames of controversy, the actual dissemination of knowledge by elites has instead deflected debate in a way that hasn’t been true of other culture war issues like abortion. The knowledge producers of marriage promotion efforts have made this deflection a specific goal. Mary Myrick, founder and president of the project management firm operating the Oklahoma Marriage Initiative, and Theodora Ooms, the firm’s senior consultant, discussed a conscious effort to focus on research findings to alleviate concerns over a highly controversial subject:

We highlight a dimension of the OMI that has not received much comment to date, namely its commitment to using data and research to guide the planning, implementation, and evaluation of the initiative.... Why such a strong emphasis on research? The OMI leadership understood that, when tackling such a new and highly controversial subject as marriage, it was important to ground their work in the best research available. In the short term, this might help to defuse some of the considerable uneasiness and potential criticism about the program. In the long run, it would increase the likelihood that the effort would be successful. (Myrick and Ooms 2002:3-4)

Knowledge producers recognized early on that government policies to promote marriage would be contentious. One way to deflect controversy has been to focus on “objective” accounts of research that provide broad and overstated claims on the benefits of marriage. In the next section, I analyze the boundary work that also made marriage promotion efforts appear less controversial. Knowledge producers rely on an epistemology of marriage—

knowledge about the “natural” American family—to make the case for marriage appear commonsensical and ordinary.

### **Boundary Work and the Epistemology of Marriage**

Marriage advocates have argued for the necessity of upholding the public meaning of marriage where society “formalizes its definition, and surrounds it with norms and reinforcements, so we can raise boys and girls who aspire to become the kind of men and women who can make successful marriages” (Gallagher 2004b:266). Aspirations to renew a marriage culture demonstrate the depth of radical transformations in intimacy and family in the United States. Just half a century ago, it was taken for granted that people would get and stay married. Social theorist Neil Gross noted that the drop in marriage rates and the increase in rates of divorce, cohabitation, and unwed childbearing means a decline in “regulative traditions” that concern “the threatened or actual exclusion of an individual from some moral community if certain practices regarded as central to that community’s historical identity fail to be engaged in” (2005:288). He named the regulative tradition that is at play in marriage culture “lifelong, internally stratified marriage” (LISM): cultural investment in an idealized heterosexual dyad, regulated through state control or a religiously sanctified commitment, and based on an unequal division of labor and power between the genders. Marriage advocates have sought to revive this regulative tradition, although many favor a more gender-egalitarian version.

While the power of the regulative tradition has declined, making it easier for people to enter and exit relationships of their choosing, the ideal and hegemonic form of coupledness extolled by the regulative tradition of LISM still exists. Gross argued that the regulative tradition is not the end of the story; in addition, there are “meaning-constitutive traditions,” defined as expression that enables the possibility for and the transmission of social actions from generation to generation. These meaning-constitutive traditions idealize the nuclear, heterosexual family to make possible “the thinkability of particular acts and projects” (Gross 2005:296). In this sense, these traditions act as a form of



common sense to mark the way that things have “always” been done, and to construct a boundary between “us” and “them” through everyday, unconscious practice. Michèle Lamont (1992, 2002) elucidated the categories or “mental maps” people use when drawing moral and symbolic boundaries between “us” and “them.” Her concept of “boundary work” shed light on the discursive practices that comprise the inclusion of the “pure” and the exclusion of the “polluted” (see also Douglas 1966). In the case of marriage, meaning-constitutive traditions create a bounded space that situates the heterosexual, monogamous couple at the unmarked center in relation to other non-normative relationships (Brekhus 1998).

Nostalgia is a significant factor in producing and maintaining an epistemology of marriage. It relies on an idealized family of the past to consolidate American identity, a past when marriage was supposedly unburdened by the specters of homophobia, class divisions, gender and racial politics, and other anxieties attendant on postindustrialization and globalization (Coontz 1992). Political scientist Mary Caputi maps out how the conservative movement in the United States has relied on an image of “home” to recreate a “*mythical*” past “to regain lost innocence amid the diversity, fractiousness, and dissonance *that in fact are more genuinely American*” (2005:23, italics in original). In recent decades, the image of home has brought comfort in the face of challenges to dominant norms fueled by identity politics and movements of the 1960s and 1970s. This epistemology of marriage enables Americans “to go back to our former identity, search the past for forgotten meanings, and re-create a former, more innocent version of ourselves” (Caputi 2005:110). It speaks of a time when Americans were not disconnected, atomistic, “bowling alone” (Putnam 2000). The power of nostalgia rests in its ability to re-enchanted a cherished and yet imagined past in the face of the relentless march of history. It refers not just to an individual condition but further speaks to a collective identity of symbolism that can motivate movements and collective action (Gamson 1992; Melucci 1989; Taylor and Whittier 1992).

While this epistemology of marriage relates to American identity in general (e.g., it is tied to modern conceptions of the

American dream), it has particular resonance for knowledge producers who advocate for renewing a marriage culture.<sup>4</sup> For them, the decline or “detraditionalization” of marriage speaks directly to a threatened American way of life (Cherlin 2004). An early publication by the Institute for American Values stated:

Our nation has largely shifted from a culture of marriage to a culture of divorce. Once we were a nation in which a strong marriage was seen as the best route to achieving the American dream. We have now become a nation in which divorce is commonly seen as the path to personal liberation. (Council on Families 1995:8)

The reference to divorce as a “path to personal liberation” suggests what for many is a dystopia brought about by the counterculture of 1960s. The quote evokes nostalgia for a time before this dystopia, especially in the 1950s, when the norm of the American dream meant marriage and children, a house in the suburbs, and moving up the financial and social ladder for the majority of white, middle-class, heterosexual Americans.

The epistemology of marriage maps out spaces of “us” and “them” through commonsense knowledge of heterosexuality as an unmarked category that makes the heterosexual, nuclear family appear as the “natural” family form. In this space, knowledge producers engage with ideas about relationships and marriage in a manner that assumes all relationships are heterosexual. The power of this epistemology in broader American society is exemplified by the need to place the signifier “same-sex” before marriage to signal something other than its “natural” form. This epistemology allows knowledge producers to treat marriage as fundamentally and unquestionably heterosexual. In discussing marriage as a sexual union, for example, the marriage movement’s “Statement of Principles” claimed: “Marriage elevates sexual desire into a permanent sign of love, turning two lovers into ‘one flesh’” (CMFCE et al. 2000:8). While the use of the gender-neutral term of “two lovers” could apply to either heterosexual or lesbian/gay couples, the claim that the lovers become

“one flesh” applies to a heterosexual ideal of marriage from the Genesis account of the way God created Eve by taking a rib from Adam’s side. The passage stated: “For this reason a man will leave his father and mother and be united to his wife, and they will become one flesh” (Genesis 2:24, NIV). Implicit to the idea of “one flesh” is a history of Christian moral principles of marriage between a man and a woman. The idea signals a heterosexual union, and perhaps unsurprisingly the statement does not explain what is meant by “one flesh.”

The unmarked nature of marriage as natural and universal has become more problematic due to the success of campaigns to legalize same-sex marriage that led to the recent landmark U.S. Supreme Court’s decision in *Obergefell v. Hodges*, which ruled that denial of marriage licenses and recognition of same-sex marriage violates the Due Process and Equal Protection clauses of the Fourteenth Amendment of the U.S. Constitution. A *USA Today* article spelled out the paradox for these knowledge producers: “The key question that the movement’s leaders—and critics—are grappling with is how one can be a proponent of marriage in general but oppose marriages between gays” (Peterson 2000). On this question, marriage advocates have been split. Some leaders—particularly conservative Christians—unreservedly have rallied to ensure marriage remains exclusively heterosexual. A small faction believes marriage would benefit lesbians and gay men. The vast majority, however, seek to avoid the issue by treating marriage as an unmarked category that applies only to heterosexual couples.

This strategy reaches the highest levels of the elite. A search on the National Healthy Marriage Resource Center website for the words “same-sex marriage” or “marriage equality” does not yield a single article that specifically addresses the issue. Nor does the website include any of the scholarly articles or offer any reports on research pertaining to lesbian and gay parenting. Jamie McGonnigal, a writer for the blog “Talk About Equality,” posted an entry on finding a relationship/marriage advice website called Twoofus.org, a “sister site” of the National Healthy Marriage Resource Center and funded by the U.S. Department of Health and Human Services. He says, “Unsurprisingly, after spending a few

hours combing the site, searching 'gay,' 'lesbian,' 'same-sex' and a number of other terms, I discovered there was absolutely zero recognition of same-sex couples" (McGonnigal 2010). McGonnigal sent a message to the contact e-mail address provided on the website asking if they had any advice for same-sex couples or services to offer. The reply:

While same-sex marriage has been legalized in some states it has not been instituted at the Federal level. As an organization that has received a grant from the Federal government we operate within specific, defined parameters; we do not make policy. Our charge is to share constructive information with the general public about healthy marriages and relationships, and, when needed, provide an easy way for site visitors to find local marriage educators or counselors (in McGonnigal 2010).

This response is particularly interesting not only in that it relies on federal policy to offer justification for failing to provide information on lesbian and gay relationships, but also because it suggests that same-sex relationships cannot enrich the broader conversation of sharing "constructive information with the general public about healthy marriages and relationships." This example offers an important window into how knowledge producers rely on an understanding of heterosexual marriage as an unmarked category. In this case, same-sex marriage forms a marked category "qualifying it as a 'specialized' form that we must distinguish from its more 'generic' form" (Brekhus 1998:35), which becomes a means of exclusion.

The controversy over legalizing marriage for lesbians and gay men would seem likely to pull proponents of marriage promotion into the eye of the storm. Over time, however, elite knowledge producers were able to deflect controversy by making it clear that their message was about "marriage" and not issues relating to lesbians and gay men. This boundary work surfaced in 2004 after President George W. Bush announced his plan to

include provisions in welfare reform's legislation for \$1.5 billion to finance marriage promotion activities. The *New York Times* covered the story by analyzing its timeliness in terms of President Bush's then-recent announcement of support for a constitutional amendment to ban same-sex marriage, following the Massachusetts decision legalizing marriage for lesbian and gay couples. The article also quoted an unnamed presidential advisor who suggested that Bush's proposal to fund marriage promotion would also help to solidify the conservative base in an election year (Pear and Kirkpatrick 2004). Elizabeth Marquardt (2004), vice president for family studies at the Institute for American Values, wrote a lengthy response in the *Chicago Tribune*. She decried the *Times* journalists' conflation of the "Healthy Marriage Initiative, the battle against same-sex marriage, and election year politicking." On the one hand, Marquardt correctly pointed to the fact that efforts to promote marriage far predated President Bush's pronouncement against same-sex marriage. On the other hand, she downplayed any connection between efforts to promote marriage and battles over same-sex marriage. Marquardt claimed that marriage education—teaching couples communication and behavioral techniques that promote healthy marriages—is not a conservative but a liberal idea, comparing it to efforts to educate the public about drugs or sex education. That lesbians and gay men should be part of this broader conversation about whether the government should promote healthy marriages was never mentioned. The assumption of a universal heterosexual norm for marriage hides any contradiction in her logic.

Internal debates over the issue of marriage for lesbians and gay men led knowledge producers to release the 2004 statement, *What's Next for the Marriage Movement?*, which specifically addressed it as one of the great cultural and legal challenges to marriage in the 21st century (IAV 2004). This document signed by many prominent scholars and policy experts was the last official statement to be issued. After this, two of the elite—David Blankenhorn and Maggie Gallagher—both continued to focus their activities and organizations on debating the issue of "same-sex marriage." Maggie Gallagher—a Roman Catholic and a social conservative—became the president of the Institute for Mar-

riage and Public Policy, a conservative think tank that houses the webzine “MarriageDebate.com,” dedicated to discussing issues concerning lesbian and gay rights and same-sex marriage. David Blankenhorn, who identifies as a liberal Democrat and is founder and president of the Institute for American Values, authored *The Future of Marriage* (2007), in which he argued that children need both a mother and a father, and because same-sex marriage can’t provide that, it’s bad for children and for society. Blankenhorn acted as an expert witness in *Perry v. Schwarzenegger* for the proponents of California Proposition 8 (2008), a constitutional amendment restricting marriage to the union of opposite-sex couples.<sup>5</sup>

While a few rallied against same-sex marriage, most knowledge elites focused solely on marriage promotion, addressing the issue as if marriage and relationship education only applies to heterosexual couples. These knowledge producers champion marriage education. Knowledge elites—including academics such as Bill Doherty, Howard Markman, David Popenoe, Scott Stanley, and other non-academics and pop cultural icons such as John Gray, author of best-selling book *Men Are from Mars, Women Are from Venus* (1992)—participated in the annual Smart Marriages conference, sponsored by the Coalition for Marriage, Family and Couples Education, with a goal of making marriage education widely available to the general public. In 2010, this organization held its final conference and a newly formed organization took over: the National Association for Relationship and Marriage Education (NARME.org), whose mission is “to foster education for healthy marriages, responsible fathers, and strong families in America.” The website specifies that:

We unite our efforts as allies in a common mission to save future generations from the destructive consequences of failed marriages, irresponsible fathers, and broken homes that result in poor child outcomes.

We call upon government, business, community and faith-based leaders to take responsibility and

develop the leadership and resources necessary to lead a national effort to promote healthy marriages, responsible fathers, and strong families that result in positive outcomes for both children and adults. (NARME N.d.)

Their mission reflects the strategic use of statistics and research on the breakdown of families to garner support: “Our approach will be continuously informed and updated by the latest research findings.” It also draws on the epistemology of marriage that suggests the need to return to a time when the “consequences of failed marriages, irresponsible fathers, and broken homes” were not prevalent.

## **Conclusion**

Contentious issues in U.S. society—like abortion and gay rights—have often been analyzed from a culture wars framework, focusing on how values create opposing extremes. This article has sought to complicate this picture to analyze the ways that knowledge elites handle and seek to deflect controversy. My theorization of the knowledge-shaping processes for potentially contentious issues offers a window into the ways that knowledge, values, and beliefs can be assembled in loosely bounded domains to become less controversial. Marriage promotion involves actors who approach the world from different perspectives, beliefs, and values. Yet common ground and consensus are reached by means of the strategic use of social scientific research to justify the idea that heterosexual marriage is the best institution for raising children and for strengthening American society. In this sense, knowledge is a productive force that gives meaning to alternate object worlds, both fictitious and real (see Reed 2010). Elites work to deflect tensions both among members who rely on science as an uncontroversial focal point of consensus, and among outsiders who knowledge producers seek to convince with objective “facts” that deflect attention away from the hypotheses, methods, and findings that can motivate research agendas. Providing simplistic accounts of research that do not reflect the diversity of

social scientific knowledge allows elites to make a case that will most likely be accepted by the general public, media, and other scholars without the expertise to know the complexities.

Thus, one way to deflect controversy is reliance on simplistic, objective “facts” that favor a particular value or understanding of a contentious issue. However, this first step is not enough to quell controversy. In some cases, reliance on scientific interpretation and facts is not sufficient to prevent or deflate it. Reliance on scientific explanation, for example, has not been able to subdue the cultural battles over global warming. In this case, those who identify as climate skeptics reject the idea that individuals tend to view scientific information through a cultural lens. The embrace of the objective nature of science has created more divisive factions rather than brought the two sides to a middle ground (McCright and Dunlap 2011). In the case of marriage promotion, objective “facts” equating the breakdown of family to the breakdown of society might also create more divisiveness and controversy. There is a tendency for people to react to scientific evidence on societal risks by endorsing the position that reinforces their connection to others with shared values. Thus, I argue that knowledge producers rely not only on scientific “fact” but also on commonsense understandings of contentious issues whose power rests on the unmarked nature of this knowledge—the idea that the heterosexual, nuclear family is the “natural” family form.

In this article, I’ve drawn on cognitive sociology and the critical study of heterosexuality to explain this second method that knowledge producers depend on to deflect controversy. When possible, knowledge elites perform boundary work based on marked categories of homosexuality and same-sex marriage that allows heterosexual marriage to maintain its position as natural and unquestioned. Drawing on the critical study of heterosexuality, I have analyzed the ways that commonsense, heteronormative ideas about the nuclear, married family of an America from the past persist in our current understandings of marriage and family. Knowledge elites draw together facts about the superiority of marriage, nostalgia for marriages of the past, and a link to American identity to push marriage promotion forward as a commonsense ideology that can be more easily justified than other



culture war issues. Thus, the boundary work of marriage advocates who simplify and prioritize knowledges that make a case for the superiority of heterosexual marriage shines light on the ways that these elites perpetuate inequalities rooted in ideas about the heteronormative family.

In complicating the culture war thesis that focuses on polarized beliefs, this article has sought to elucidate the implicitly contested cognitive maps—in this case, the marked and unmarked knowledges of heterosexual marriage—that construct everyday understandings and that structure inequalities. These cognitive maps structure the conditions that help to sustain punitive policies that either reject lesbian and gay families or require them to mimic the heterosexual ideal of family life. Social and historical context is important to the boundary work that concerns the changing relation of marked and unmarked categories. In particular, actors seek to solidify boundaries when that which was once unmarked becomes more volatile and exposed. Positioned as “expert,” knowledge claims about heterosexual marriage perpetuate the taken for granted practices that situate it at the top of sexual and family hierarchy (Rubin 1984). At the same time, boundary work can lead to social change by challenging the nature of the spaces of “us” and “them.” For the knowledge producers who promote marriage, the challenge of increasingly liberal attitudes towards lesbians and gay men causes stress on the implicit practice of promoting marriage as *heterosexual*. While marriage advocates continue to treat marriage as fundamentally heterosexual, they are now more likely to contend with the issue of same-sex families.

This article has not dealt with the knowledge shaping practices of elites who are critical of marriage promotion efforts. This much smaller and less influential liberal-leaning effort includes actors and organizations that disseminate information on family diversity—the need to support families in all their manifestations. It involves academic feminists and non-elite, left-leaning scholars who have joined other activists to complicate the “case for marriage.” In 1996, such a network spearheaded the Council for Contemporary Families, based at the University of Miami, offering a counterbalance to the National Marriage Project. Its mission is to

supply the press and the public with the latest research on changing American families. The boundary work involved in this case is likely to differ substantially from that of marriage promotion, due both to its smaller size and to a more tenuous connection to the dominant values and unmarked categories of the broader culture. Future empirical research might compare the knowledge shaping practices of elites who emphasize marriage promotion and those who study the diversity of family life to uncover the multiple strategies of knowledge dissemination and how different cognitive maps interact with the broader society. Much can be gained in understanding how knowledge of contentious issues is shaped and mapped from the study of various practices for and against efforts to promote heterosexual marriage.

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### Notes

1. Charlotte Bunch (1975), Adrienne Rich (1980), and Monique Wittig (1992) argued that heterosexuality is neither natural nor inevitable but instead a taken-for-granted institution that regulates those within and outside its boundaries. Theorizing from a feminist perspective, Rich (1980) posited that “compulsory heterosexuality” is an institution that disadvantages all women by sustaining male privilege. Wittig’s (1992) *The Straight Mind* critiqued the institution of heterosexuality as neither natural nor inevitable but instead as a political regime.

2. This article draws on archival materials of news articles, reports, and statements written by marriage advocates ranging from the

years 1990 to 2010, issuing from sources such as the Institute for American Values, the National Marriage Project, the National Fatherhood Institute, Institute for Marriage and Public Policy, the Center for Law and Social Policy (CLASP), the Brookings Institution, the Family Research Council, and the Heritage Foundation. Searches were conducted on the National Healthy Marriage Resource Center website, a clearinghouse for resources on marriage education and promotion. Congressional and Senate hearings on marriage promotion policies were analyzed. All data were coded using a qualitative software program, Atlas.ti.

3. My analysis of data ended in the year 2010, and therefore does not include the controversy over the findings of sociologist Mark Regnerus, the principal investigator of the New Family Structures Study (NFSS) that was commissioned by the conservative Witherspoon Institute. Based on a large nationally representative sample of just under 3,000 young Americans aged 18 to 39, he found that children of mothers who have had same-sex relationships did significantly worse as young adults on 25 of the 40 outcome measures compared to those who spent their childhood with their married, biological parents. After his findings were published in 2012 in *Social Science Research*, many social scientists pointed to serious flaws in the study design, which confounded differences between parents' sexual orientation and being raised in a disrupted family.

4. Nostalgia movements are not singularly located among conservatives but have also been important to the radical left, such as in idealizations of the proletariat. Cultural theorists have traced the way nostalgia organizes knowledge for both progressive and regressive social change (e.g., Hazek 2012; Velikonja 2009).

5. In 2012, Blankenhorn publicly announced his change of heart on the issue of same-sex marriage, stating his support and his desire to build new coalitions between gay and straight individuals to strengthen marriage (Blankenhorn 2012).

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## **AGING AS DISEASE: HOW RADICAL VIEWS ON LONGEVITY EXPOSE UNEXAMINED ASSUMPTIONS IN MAINSTREAM THEORY ON SUCCESSFUL AGING**

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Those researchers and public figures who argue that aging is a blight and propose various schemes for bioengineered immortality have placed themselves well outside of mainstream scholarly opinion on the matter of successful aging. However, much conventional gerontological discourse seems to share elements of this resistance to aging. This paper explores a currently marginal intellectual movement advocating an end to senescence and how it challenges social scientists to account for an undercurrent regarding aging as comparable to a disease in much of their work. An overview of scholarly viewpoints on successful aging is presented alongside an analysis of the aging-as-disease movement's stance and prospects for growth. Ultimately, the paper investigates how aging-as-disease researchers invite scholars and the public at large to rethink the process of growing old, as well as what implications this potential shift in perception might have for how we relate to older adults.

**T**he Methuselah Foundation is unusual as a not-for-profit medical research institute. Rather than focus on treating a specific disease or set of diseases, it has set for itself the goal of dramatically extending healthy human life (Methuselah Foundation 2011a). At first glance, this might seem a common, well-recognized, and perfectly uncontroversial objective. After all, what are the countless disease-prevention and treatment research institutes working for but the goal that people will live longer and more satisfying lives free from various intervening maladies? A closer look, however, reveals that the Methuselah Foundation seeks to "end age-related diseases once and for all" (Methuselah Foundation 2011b). In short, it is working not simply toward a longer and healthier life, but toward a lifespan that is completely unmarked by the pathologies of aging and is, therefore, potentially indefinite.

The following pages feature an analysis of what I refer to as the aging-as-disease phenomenon represented by the Methuselah Foundation and similar organizations, such as the Strategies for Engineered Negligible Senescence (SENS) Foundation and the American Academy of Anti-Aging Medicine, whose co-founder Ronald Klatz is on record anticipating and working toward a future without aging (Kuczynski 1998). The movement embodied by these organizations manifests not just as a resistance toward growing old and frail, but also as a funded and institutionalized campaign to overcome the condition of aging itself. For the time being, it is a fringe movement (Hooper 2005; Mykytyn 2008) whose leading organizations operate well outside of conventional gerontological research; anti-aging medicine is not recognized by the American Board of Medical Specialties or the American Medical Association.

Despite its current marginal status, however, it is important to consider what implications the trend has for gerontology and attitudes toward the older population, as well as what potential there is for it to become a mainstream interest. Above all, it behooves social scientists to recognize that the seemingly radical aging-as-disease agenda actually shares a theoretical starting point with long-held theories about successful aging, or how individuals can maximize wellbeing late in life. As I will demonstrate, in spite of apparent controversy, there is in fact a broad but tacit agreement among gerontologists that aging is comparable to a disease, with all of its negative connotations.

The argument brought forth in this paper serves to remind us not only that shared conceptions and attitudes may underlie open intellectual controversy, but also that knowledge in the social sciences is often produced on the basis of premises and assumptions that are difficult or impossible to scrutinize empirically even as they wield significant influence over how data are gathered, interpreted, and reported (Hammersley and Gomm 1997).

### **The Aging-as-Disease Movement**

The human interest in life extension has a rich and far-reaching history, ranging from ancient legends about fountains and

elixirs to present-day discussions about the role of mitochondrial manipulation (Smigrodzki and Portell 2010), tissue and organ replacement (Atala 2010; West 2010), gene selection (Reis and McEwen 2010), nanotechnology (Freitas 2010; Kurzweil and Grossman 2004), and other strategies in allowing us to perpetually renew our bodies. As Haber (2004) explained, since the nineteenth century the pursuit of longer life has assumed an increasingly negative attitude toward aging, with many viewing the process of growing old as corrosive to individual wellbeing and dangerous to society as a whole. Today's theoreticians, scientists, and philanthropists seeking an end to biological aging send the clear message that it is a disease to be remedied (Haber 2010).

It is worth clarifying, though, that a thoughtful reading and consideration of these views shows that these individuals are actually more troubled by morbidity than by mortality (Gavrilov 2002). It is the extension of active lifespan (Katz et al. 1983), not just the lifespan per se, that interests them. For instance, Sarah Marr, one of the co-founders of the SENS Foundation, drew a distinction between aging and the disabilities of aging, clarifying that the Foundation's mission is to prevent the onset of disorders such as dementia and diabetes (SENS Foundation 2010). Marr, whose foundation focuses on rejuvenation innovations to defeat age-related pathologies, is interested not in having people live longer with Alzheimer's, but in having people live longer with the unhindered capacity to enjoy life.

Such a clarification ought to remind us that gerontological literature deals with a panoply of topics, not just successful aging. For instance, narrative gerontology homes in on how storytelling can illuminate the biographical dimension of aging (Kenyon, Bohlmeijer, and Randall 2010). Social gerontology includes theories of cumulative advantage/disadvantage, which describe how advantages or disadvantages experienced early in life accumulate throughout the aging process (Dannefer 2003), and age stratification, which refers to how society sorts individuals into age groups with certain ascribed roles and expectations (Palmore 2005). The record produced by aging-as-disease advocates shows that they only dismiss those theories of aging that involve making the best of biological failure (successful aging). They do not show

any distaste for those theories that center on self-reflection, accrued wisdom, post-retirement volunteering, and other aspects of aging not specifically related to pathology. If one could live healthily for thousands of years, accumulating a hefty store of life experience and knowledge, this form of aging presumably would not bother aging-as-disease researchers at all. For this reason it is technically an oversimplification to employ the label “aging-as-disease,” though for brevity’s sake I will use the term to characterize research that focuses solely on achieving the complete prevention of the biological failures associated with aging.

A further qualification is that I will use “aging-as-disease” to categorize those individuals who have either stated explicitly that they seek the possibility of immortality and/or have been directly involved with organizations that pursue this goal (such as the Methuselah Foundation). As will be detailed later in the paper, there are researchers who argue that scientific inquiry and innovation should be focused less on treating specific diseases associated with aging and more on undermining the aging process itself, but they make a point to differentiate themselves from those with the more radical goal of doing away with natural death altogether.

It is also problematic to use the term “anti-death” (Mykytyn 2009). During a presentation at the 2011 Idea Festival, Aubrey de Grey (co-founder of both the Methuselah and SENS Foundations) stated that his priority is not longevity; rather it is giving people the ability to choose how long they wish to live instead of having to succumb to an arbitrary time imposed on them by failing health (FORA.tv 2011). De Grey’s statements strongly suggest support for assisted suicide and thus make “anti-involuntary death” perhaps a more fitting title. Indeed, the Immortality Institute (2009) declares that its mission is “to conquer the blight of involuntary death.” To conceptualize this position within gerontological theory, we can imagine the rectangularization of mortality—the model reflecting the observation that most people living in developed countries survive to advanced ages and then die relatively quickly (Gjonça and Marmot 2005)—replaced by a model showing how likely one is to *choose* to die at a given age. Because aging-as-disease advocates identify individual suffering as the reason that aging is abominable, they consider voluntary

(and, therefore, we must assume painless) death to be the most desirable form of mortality.<sup>1</sup>

Having defined the boundaries of the aging-as-disease camp, I will now review more thoroughly what these individuals believe and draw out an underlying commonality in the aging-as-disease approach and in mainstream gerontology's scholarly treatment of successful aging.

### **How Aging Is Portrayed Explicitly and Implicitly as a Disease**

Aging-as-disease researchers agree that late biological aging is marred by suffering (Aigner et al. 2004; Crouch et al. 2007; Davis and Kipling 2006). In addition to highlighting the personal misery that aging often entails, they commonly make the point that it represents a potential disaster for civilization. For example, de Grey (2007a) marshaled evidence showing that modern, economically advanced countries could in the near future face serious problems allocating funds to accommodate a growing population of senior citizens who will create increasing stress on the tax base, medical infrastructure, and economy in general.

Though the tone in which de Grey voiced these concerns might seem alarmist, there is an abundance of scholarship indicating that the demographic transitions occurring in many Western countries necessitate considerable policy change (Crystal and Siegel 2009; Irwin et al. 2009; Magnus 2008). Of course, this is not to say that mainstream, credible reports suggest that only a defeat of aging can alleviate the future stress caused by aging populations. However, it is certainly a matter of widespread agreement that growing numbers of older people in Western nations pose challenges to their respective societies at large. Many mainstream scholars are treating aging in part as a policy problem. For example, Kinsella and He (2009) argued that increases in public spending and losses in productivity in Europe could lead to a situation in which the EU's economic growth rate is cut in half by 2030. With its population not only aging but also shrinking, Europe is finding itself deliberating between the prospect of a substantial increase in immigration (with all of the political and cultural turmoil that would promise on a continent where anti-

immigration parties have lately gained strength) or accepting a position of decreased influence on the global stage (Bernstein 2003).

It is also widely acknowledged that older people can pose significant financial challenges in the form of the economic costs involved in treating age-related diseases and providing healthcare for the afflicted (Di Carlo 2009; Mariotto et al. 2011; Schofield et al. 2011; Zhao et al. 2010). The Alzheimer's Association (2010) predicted that, in the absence of treatment innovations, the cumulative cost of healthcare for people suffering from Alzheimer's over the next forty years will exceed \$20 trillion in today's dollars. Four prominent mainstream gerontologists (including Robert Butler, the first director of the National Institute on Aging) arrived at similar figures, if policymakers do not facilitate scientific intervention (Butler et al. 2006). They also commented that, whereas today medical research institutes attack diseases individually, it would be more productive to focus on "the underlying biological changes that predispose everyone to fatal and disabling diseases and disorders" (p. 33), which they identified directly as being associated with the aging process. Following this logic, they concluded that the medical establishment's new priority should be to delay all aging-related disorders by about seven years. It is noteworthy that these scholars' writing suggests some sympathy with the conception of aging as a disease. Though they made a point to separate their proposals from those of aging-as-disease advocates (which they dismissed as unrealistic), there remains an interesting commonality in the form of the apparent nod to the notion that aging can be seen as a disease, while cancers, cataracts, heart disease, arthritis, and other aging-related afflictions can be considered symptoms.

What are we to make of the strange coexistence between subtle agreement with the aging-as-disease camp regarding the nature of aging and refusal to call it a disease (or at least objectionable) outright? It is impossible to essentialize those opposed to the aging-as-disease camp. Butler's (1980) disagreement, for example, stems from his stance that any prejudicial attitudes toward the aging process are tantamount to bigotry. On the other hand, Olshansky (another contributor to the above-mentioned

report from 2006) seems to reject the notion that aging is a disease simply because he considers it inevitable and, therefore, sees no benefit in lamenting its tragic nature (Olshansky and Carnes 2001). There are clearly several different philosophical orientations motivating disagreement with aging-as-disease research and advocacy, but the fact remains that the mainstream of gerontology (of which Butler and Olshansky are undisputed representatives) persists in distancing itself from the radical aging-as-disease camp even while sharing a base of agreement. The similarity in assessment of aging becomes especially evident when we examine mainstream theories of successful aging.

### **How Successful Aging Theories Implicitly Endorse the Aging-as-Disease Assessment**

Over the years scholars have posed various sets of criteria for judging how well an individual has lived out the autumn of his or her life. While these models have been valuable to social workers, therapists, and other practitioners working to increase happiness among older adults, many of them suggest that old age is like any period of life in terms of how to live well, and those that do claim uniqueness to old age tend to emphasize hardship.

Rowe and Kahn (1997) proposed a three-pronged conceptualization of successful aging that is arguably the most popular. Their model presents low probability of disease or disability, high cognitive and physical capacity, and active engagement with life as the three essential components of aging successfully. Palmore (2002) provided a similar three-fold definition of successful aging: longevity, health, and happiness (as life satisfaction). Lawton (1983) defined successful aging in terms of four "sectors": behavioral competence (motor behavior, etc.), psychological well-being, perceived quality of life, and objective environment (housing conditions, neighborhood, activities, etc). There are dozens of other comprehensive papers covering the topic of successful aging, many of which are referenced in excellent overviews assembled by Lupien and Wan (2004) and Young, Frick, and Phelan (2009).



Rather than provide an exhaustive literature review, the priority here is to draw attention to the fact that the corpus of scholarly work on successful aging tends to revisit several recurring themes: physical health, longevity, psychological wellbeing, strong relational networks, independence and sense of control, and day-to-day stimulation. From these variables it is evident that successful aging, as conceptualized in mainstream gerontological theory, seems to be simply successful living. Surely, physical health and psychological wellbeing are important to human wellbeing whether in adolescence, middle age, or old age. As a Pew study confirmed, “the same factors that predict happiness among younger adults—good health, good friends and financial security—by and large predict happiness among older adults” (Cohn et al. 2009:8). Using these kinds of indicators to assess successful aging implies that aging well simply involves the extent to which living well can be sustained. Strawbridge, Wallhagen, and Cohen (2002) noted that Rowe and Kahn seemed to imply this with their conceptual model of successful aging:

...they argued that what many viewed as effects of aging were, in fact, effects of disease. They proposed that those aging successfully would show little or no age-related decrements in physiologic function, whereas those aging ‘usually’ would show disease-associated decrements, often interpreted as the effects of age. (P. 727)

If successful living in old age were set apart in some meaningful way from successful living in middle and young age, then successful aging would depend not only on avoiding decrements in physiologic function, but also on fulfilling some unique purpose of old age. If, however, successful aging centers on wellbeing, and if wellbeing is essentially the same in terms of general causal factors throughout the life course, then the physical and cognitive markers of advanced age can be seen as hurdles to successful aging, conceived of as successful living. Because Rowe and Kahn did not ascribe any such unique purpose to old age, their model (as described here by Strawbridge, Wallhagen, and Cohen) was

built on the idea that successful aging is aging without the effects of biological aging. Thus we observe again the tacit implication that aging can be conceived of as a disease, or at least something negative that ought to be remediated in some way.

Even the models of successful aging that emphasize resilience implicitly accept the view that aging is a disease. For example, Reichstadt et al. (2007) gathered opinions from older adults about successful aging and assembled a theoretical framework of subjective wellbeing in old age based on these testimonies. Among the four major themes they identified was attitude/adaptation, which included “references to resignation and a ‘realistic’ appraisal of limitations” along with the importance of not dwelling excessively on one’s age (p. 197). A study by von Faber et al. (2001) also revealed that most senior citizens considered successful aging to be a matter of adaptation. Similarly, Baltes and Baltes (1990) suggested a model of selection, optimization, and compensation. According to this model, the life course involves a continuous process of choosing areas of one’s life (interests, routines, relationships, etc.) on which to focus, maximizing gains from those chosen areas and compensating for mounting losses in behavioral capacities (which decrease dramatically as we age) in order to continue enjoying benefits from selected functional domains. Again, adaptation is central to successful aging.

Of course, a case can be made that adaptation is an important aspect of successful living before old age and, therefore, that there is nothing especially telling about its inclusion in models of successful aging; however, the in-built changes of adolescence and middle age that require adaptation are often matters of gain. Overwhelmingly, models of successful aging explain adaptation as a coping mechanism for dealing with increasing negative changes: declining health, reduced independence, disability, etc. Aging is thus constructed as a process predominantly marked by loss and decline.

Furthermore, some scholars have advanced models of successful aging built entirely on this idea of coping with the myriad challenges of old age. Kahana and Kahana (1996) put forth the preventive and corrective proactivity model, which “explores ways in which older adults shape their armamentarium of re-

sources and enhance their late-life well-being as they prepare to confront and actually face normative stresses of aging” (p. 19). Along the same line of reasoning, Harris (2008) provided two in-depth case studies of people with early stage Alzheimer’s who, despite struggling with a condition that will eventually render them completely helpless, manage to remain engaged in life by not being bitter or angry about their diagnosis. Citing the two Alzheimer’s patients, Harris argued that the truly meaningful objective as we age should not be successful aging; the goal should be to cope and do “OK.” According to this model, how well one manages with age-related adversity ought to be the tent pole (if not the only component) of any assessment of successful aging: living well *in spite of* senescence. Again, implicit in these formulations is the idea that aging is comparable to a disease; it is a stage of life defined by adversity and stress.

While successful aging might conceivably be defined as the attainment of some state of being specific to old age, mainstream successful aging scholarship either extends successful living theories into old age (thus implying that successful living in old age requires putting off the biological trappings of aging as long as possible) or makes adaptation and resilience central to living well in old age (thus implying that aging is something that requires coping: a matter of loss, limitation, and compensation). The aging-as-disease camp differs only in that it makes the comparison of aging to disease *directly*; this difference, however, leads to substantial deviation in the research goals of the two camps. Because aging-as-disease advocates view aging as surmountable, they feel that there is no reason to deal with terms like “successful aging.” They can say outright that aging is despicable, that one lives successfully in essentially the same way at thirty-five and seventy-five, and that this success is ultimately ruined by biological aging itself. Therefore, they declare, the condition should be done away with. To say anything but that, they argue, is to intellectualize a human tragedy needlessly (de Grey 2007b).

This accusation of over-intellectualizing aging does not apply, however, to those theories outside of (and, in fact, rather critical of) the mainstream that assign unique importance to old age. Moody (2005) proposed a more holistic concept of success-

ful aging, arguing that old age possesses an essential value to society and the shared human condition regardless of the aged individual's enjoyment or suffering. As he sees it, older people should be more inspiring in wheelchairs than on ski slopes, as disability serves as an example of the human spirit's resilience in the face of perfectly natural illnesses. Similarly, Tornstam (1997) called for a reassessment of old age according to more spiritual considerations. According to him, aging individuals are able to move toward a state of being he referred to as "gerotranscendence" (Tornstam 2005), which entails a series of changes from a materialistic and narcissistic outlook on life to a more cosmic, transcendental, and selfless one informed by life experience and a sense of communion with past generations. This perspective posits aging as a time designed for reflection and taking account of one's life narrative, something less feasible when working a job and raising children. According to this stance, successful aging is not merely successful living drawn out as long as possible; it is the effective realization of advanced age's specific purpose. Here aging is good and necessary. While aging-as-disease researchers disagree with this portrayal of aging, charges of logical inconsistency and theoretical redundancy would not be sustainable. It is therefore possible to construct a model of successful aging that is not troubled by implicit assumptions of aging as a disease.

### **Forecasting the Future Popularity of the Aging-as-Disease Movement**

If an increasing number of people come to see aging as a disease and "successful aging" as a rhetorical superfluity and distraction, then there could be major implications for gerontological scholarship and debate (concerning not only successful aging), for attitudes toward the aged (which I will address later), and for healthcare and governmental regulation of medicinal research and drug production. While there are plenty of research institutes ready to investigate possible drug treatment of aging altogether rather than just individual age-related diseases, the current regulatory environment in Europe and North America is unaccommodating to such practices. Regulators will not license

medicines for something as general as aging because it is not considered a disease. This creates a disincentive to pharmaceutical companies to develop drugs that would attack the biological processes that make the human body vulnerable to the more specific ailments that regulators recognize as diseases (Kelland 2010). However, such an environment could change if enough people were to come to view aging as a disease. Therefore, it is worthwhile to gain an understanding of how popular the aging-as-disease perspective is and what potential it has for growth.

The aging-as-disease movement has received widespread attention from both the general news media (Hsu 2011) and popular science news (Technology, Entertainment, Design 2006). Responding to a particularly popular proposal for anti-aging treatment—Strategies for Engineered Negligible Senescence (SENS)—a number of respected scholars and public officials voiced concern that it has received great attention from popular media, suggesting that the debate is moving more front-and-center in popular discourse (Estep et al. 2006). These individuals also warned that the promise of conquering involuntary death is “a hopelessly insufficient but ably camouflaged pipe-dream” promulgated unscrupulously “to the hopeful many” (p. 3).

In spite of such critiques, recognizing that there are a hopeful many is an important factor in considering the future popularity of the aging-as-disease vision. As Higgs et al. (2009) observed, the greater individualization that has grown up in recent decades has spawned a new emphasis in much of Western society on self-reliance, consumption, and a new socially-constructed notion of productivity that views the physical deterioration built into natural aging as anathema. The result is a pervasive “will to health” in Western societies that obliges older people to prove their lasting relevance and functioning in spite of the natural aging process. An outgrowth of this widespread gerontophobic culture is a reality in which “anti-aging quackery has become a multimillion dollar industry exacting great monetary, health, and social costs” (Perls 2004:682). In addition to making them increasingly interested in avoiding old age, cultural developments demanding everlasting youth may have conditioned people to be quite receptive to the aging-as-disease message.

Talk of eliminating aging fits neatly into this cultural rejection of natural aging; however, though there is widespread attraction to sustained health and increased longevity, many may not be ready to embrace such a radical reconfiguration of the human experience. Unfortunately, there are no reliable survey data indicating how many people would want to be in control of when they die (should they choose to at all), but scholars have called into question whether the elimination of aging would be socially feasible or attractive. Bortolotti (2010) argued that a lifespan unconstrained by natural forces would inevitably become meaningless. Taking a more reserved approach, Temkin (2008) warned that people should think carefully before embarking on radical longevity research. Though he offered no definitive answer to the question of whether an indefinite lifespan would be a good thing, he did assert that we should “learn to live well before we learn to live long” (p. 207). Such attitudes may represent a more widespread resistance to conquering aging, which should remind us that new policy does not emerge from a purely rational process of substituting good information for bad information. Public notions of decency and “naturalness” can also play the role of gatekeeper to new and contentious policy. If there is a general hesitation toward eliminating involuntary death, then the future popularity of the aging-as-disease camp depends on the erosion of this cultural feature.

Additionally, Callahan (2009) warned that there are broad social consequences to radically extending average human life expectancy and that longer lives would not help to remedy any of humanity’s present problems. Callahan’s admonition reflects the fact that much of gerontology describes aging as an aspect not just of individuals, but also of social organization and culture (Baars et al. 2006). As described previously, age stratification theory (Riley 1971) presents age as a major factor in how societies structure themselves and assign roles to individuals. Because such social organization would surely be disrupted if aging-as-disease aspirations were to materialize, social gerontologists also have some role to play as critics or advocates of radically-extended life spans (Dumas and Turner 2007). Future popularity of the aging-as-disease agenda depends in part on how policymakers

and social scientists conceive of a society redefined by such new notions of lifecycle.

Another immensely important determinant of future popularity is how scientific discovery will either discredit or empower the aging-as-disease camp. A significant contributor to the skepticism toward and outright rejection of aging-as-disease proposals is their perceived lack of scientific credibility (Warner et al. 2005; Vincent 2009). Future technological progress will either confirm their pseudoscientific status or force skeptics to reconsider their objections. At the moment much theorizing on anti-aging treatment seems highly speculative. For example, in the July 2005 issue of the MIT-owned science publication *Technology Review*, editor-in-chief Jason Pontin announced a \$20,000 prize to any scientist with a published record of biogerontological scholarship who could prove that SENS is “so wrong that it is unworthy of learned debate” (Pontin 2005). In the end, no one was able to convince the judges, whose deliberations Pontin (2006) summarized:

In short, SENS is highly speculative. Many of its proposals have not been reproduced, nor could they be reproduced with today’s scientific knowledge and technology. Echoing Myhrvold, we might charitably say that de Grey’s proposals exist in a kind of antechamber of science, where they wait (possibly in vain) for independent verification. SENS does not compel the assent of many knowledgeable scientists; but neither is it demonstrably wrong. (Para. 13)

It is probably the case that even if there were to be knowledge shifts in both the social and physical sciences concerning the nature of aging, its potential for remediation, and the desirability of eliminating senescence, the process of translating such new knowledge into policy would be long and complicated. Knowledge that is relevant to social organization and value systems becomes embedded in a society’s institutions, thus often making it difficult to question and revise (Choucri 2007). As explained

before, forecasting future popularity should not be based on a model of knowledge formation as an entirely rational process by which superior data quickly supplant discredited information. “Knowledge inertia” (Liao 2002) tends to slow the transition.

Nevertheless, even if overcoming aging proves to be a hopeless fantasy and the average person never comes around to the idea of exerting control over his or her time of death, it remains the case that the aging-as-disease camp challenges mainstream gerontologists to address an unstated negative attitude toward aging in their theories of successful aging. It is noteworthy that many mainstream scholars have failed to recognize this attitude in their own research even as many of them work to combat societal ageism.

### **Anti-Aging Vs. Anti-Aged**

Any growth in popularity of the desire to eradicate aging will unquestionably entail shifting perceptions of the aged. Given the amount of negativity toward aging inherent in the aging-as-disease platform, we should consider possible overlap with ageism. The term “ageism” was coined by Butler (1969), who defined the bigotry as “a deep seated uneasiness on the part of the young and middle-aged—a personal revulsion to and distaste for growing old, disease, and disability and fear of powerlessness, ‘uselessness,’ and death” (p. 243). Butler, who was the first director of the National Institute on Aging, further defined the term in 1980, introducing three components:

- 1) Prejudicial attitudes toward the aged, toward old age, and toward the aging process...;
- 2) discriminatory practices against the elderly, particularly in employment...;
- 3) institutional practices and policies which...perpetuate stereotypic beliefs about the elderly, reduce their opportunities for a satisfactory life, and undermine their personal dignity. (P. 8)



Applying these two classic definitions of ageism, it is clear that aging-as-disease positions have components of ageism. As explained above, aging-as-disease researchers make no apologies about writing off the aging process as needlessly painful and socially draining. These attitudes illustrate Butler's criterion concerning revulsion toward the aging process; however, it is unclear whether being opposed to aging necessarily crosses the line toward being hostile to older adults through prejudicial attitudes and discriminatory practices.

Inevitably, this question returns us to the issue of whether aging can be considered a disease. If it is a disease, then one could argue that the refusal to cure aging amounts to ageism, since such a stance could imply that old people are unworthy of medical care (de Grey 2004). Furthermore, eliminating aging might then be the best way to eliminate ageism, as it gets rid of the phenomenon at the root of the prejudice. If, on the other hand, aging is not a disease but rather a desirable, lifecycle-affirming, socially necessary state of being, then those subscribing to the aging-as-disease agenda may be ageist. Certainly, no right-minded individual would propose that a good way to deal with the problem of racism is to physically eliminate races, as that would trespass upon cherished principles of diversity, multiculturalism, and the value of life.

Still, seeking to eliminate aging does not inherently and in principle entail prejudice against old people. That said, were the position to gain popularity, it could inspire resentment. Because the argument against aging includes points about the social costs of an aging population, it is entirely possible that the aging-as-disease movement could breed ill will. This possibility poses another challenge to aging-as-disease opinions taking on mainstream appeal. Representatives of conventional knowledge—both institutions and individual experts—who consider age a defining characteristic of older individuals may resist these attitudes simply because of a perceived threat to the older population's human dignity. It is important to bear in mind that contradictory viewpoints on the nature of aging do not clash in a theoretical vacuum. Even when discussing the biological dynamics of senescence, we are concerning ourselves with a state of being that defines the

day-to-day lives of millions of people, many of whom may take serious exception to any suggestion that they suffer disability and ought to be cured.

Of course, until “curing” aging becomes possible, such a social policy consideration remains in the domain of thought experiments, but (as explained before) efforts to obtain a “cure” would be hindered by an unsympathetic public. If the scientific community were to reach a consensus that biological aging is a remediable disturbance of the body’s normal and healthy functioning and should be eradicated to the extent possible, this might grease the skids for policy aimed at ending senescence, but a citizenry opposed to such a scheme would be a major barrier. The same dynamic applies to stem cell research, abortion, euthanasia, animal rights, and other issues involving the intersection of public and scientific views on suffering in democratic societies, in which public sentiment has some meaningful role to play in policy formulation.

## **Conclusion**

With respect to future developments, we can only speculate. There is no way to know at the moment what kind of scientific findings and cultural developments may push the aging-as-disease camp toward or further away from mainstream, respectable opinion. The proposal to end the human experience of aging is still a very controversial minority viewpoint. Though it is beginning to see the light of popular discourse, it remains mostly rejected by credentialed scholars.

However, regardless of scientific feasibility and popular sympathy, those pushing for an end to aging force us to interrogate widely held gerontological assumptions. The question of whether aging is a disease may well get bogged down in semantics. What is a disease, after all? What kind of connotational baggage does the word carry? However, it is at least clear that aging-as-disease researchers pose a significant challenge to conventional social scientific models of successful aging by calling into question their theoretical soundness and usefulness. If their views do become

a scientific and cultural force to be reckoned with, the challenge will be increasingly formidable.

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### Notes

1 The aging-as-disease movement presumably would have no quarrel with the line of scholarship dealing with “successful dying,” which focuses on life’s terminal stages. Though I have not found any official statements on the subject, it is possible to deduce from their argumentation about aging and death that aging-as-disease advocates appreciate the merit and use of scholarship on dying well. Unlike successful aging theories, successful dying literature is not exclusive to a particular stage of the life course. Whether considering the role of spirituality at the end of life (Kaut 2002), how to deliver the bad news that a patient has a terminal illness (von Gunten et al. 2000; Griffin et al. 2003; Arnold and Egan 2004; Curtis et al. 2005; Rabow and Pantilat 2006), managing pain during life’s final stages (Miettinen et al. 1998; Whitecar et al. 2000; Leleszi and Lewandowski 2005; Mercadante et al. 2009), or taking an active role in assisting in a patient’s passing (Pasman et al. 2009; Dees et al. 2010; Vandenberghe 2012), successful dying studies offer unique insights about a very specific experience. Even if they would argue that the pain and misery of involuntary death should not be experienced by anyone, aging-as-disease advocates would presumably recognize the importance of successful dying theory.

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