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AUTHOR Yin, Robert K.; Heinsohn, Ingrid
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ABSTRACT

This case study, one in a series of research efforts designed to examine the utilization of the Administration on Aging's research, discusses reasons for the wide utilization of the Older Americans Resources and Services (OARS) research. (The OARS methodology assesses the levels of functioning of individual elderly persons. The resulting information may be used to determine the types of services needed by the person.) OARS is first defined, and its three characteristics--an assessment instrument, a resource allocation model, and an organizational resource at Duke University--are briefly described. The OARS research project is then summarized. Illustrative vignettes describe three types of applications of the OARS methodology: estimation of potential needs for services to elderly populations across the country; community planning, and an intake instrument to assess levels of functioning of individuals entering a specific clinic or facility. Three propositions for improving utilization are suggested: extensive social networking, interventions to boost utilization, and vigorous information dissemination. These propositions are then discussed as policy implications. (YLB)

# EXECUTIVE SUMMARY

# The Uses of Research Sponsored by the Administration on Aging (AoA)

## CASE STUDY NO. 2

## Older Americans Resources and Services (OARS)

Robert K. Yin

Ingrid Heinsohn





November 1980

Gerontological Research Institute

AMERICAN INSTITUTES FOR RESEARCH
1055 Thomas Jefferson Street, NW, Washington, DC 20007

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# PREFACE

This is an executive summary of a case study on the usefulness of AoA's research. The full case study is entitled *The Uses of Research Sponsored by the Administration on Aging, Case Study No. 2: Older Americans Resources and Services (OARS),* American Institutes for Research, Washington, D.C., 1980.

This case study represents the second of several on the usefulness of AoA's research. (The first case study was entitled *The Uses of Research Sponsored by the Administration on Aging, Case Study No. 1: Transportation Services for the Elderly*, American Institutes for Research, Washington, D.C., 1980.) The goal is for each case study to show how and why the research was used for policymaking or practice purposes. The aggregate implications from all of the case studies, together with a separate review of appropriate literature, will be used to develop an R&D utilization strategy for AoA. The case study and the development of this overall R&D utilization strategy are part of the continuing work of the Gerontological Research Institute, supported under AoA award No. 90-AR-2173.

The conduct of the case study was facilitated by the assistance of key informants, who were interviewed from March through June 1980. The list of informants may be found at the end of this executive summary.

## CAPSULE SUMMARY

The Older Americans Resources and Services (OARS) is a methodology for assessing the *levels of functioning* of individual elderly persons. The assessment follows an interview, of about 120 questions, covering the full range of psychological, social, and health statuses of a person. The resulting information may be used to determine the types of services needed by the person; the information may also be aggregated across a sample of people, so that communities can design services for their elderly populations.

The OARS methodology, developed by a research team at the Center for the Study of Aging and Human Development (Duke University), has been an innovative contribution to the field of gerontology. Because the assessment is comprehensive, and because it is directly applicable to service issues, the methodology has been widely used across the country. In one notable application (there have been at least 100 documented applications of OARS), the U.S. General Accounting Office has conducted community surveys and estimated the service needs of the entire national population of older Americans. To this day, the Duke research team continues to provide technical assistance and information to potential users.

The development of the OARS methodology was based on a research project, supported by the Administration on Aging (AoA) from 1971 to 1977. Thus, the OARS experience represents another example in which AoA-sponsored research has led to practical applications. As a case study of *research utilization*, the OARS experience provides further information on how AoA might design effective policies for enhancing the utilization of other research projects in the field of aging.

Based on the OARS experience as well as those from a previous case study (see *Case Study No. 1: Transportation Services for the Elderly*),

several propositions for improving utilization should be considered. First, successful utilization follows the formation of an informal social network, linking knowledge producers (researchers) with knowledge users (service providers, policymakers, or consumers). The networking process creates a marketplace for ideas, and the support of individual research projects should be undertaken with the creation of this marketplace as one goal. In the marketplace, the key roles are played by people, and not necessarily research reports.

Second, utilization activities must also occur throughout the life of a research project, and not simply at its completion (as is now commonly the case). Research investigators and potential users must develop continued contacts with each other. The contacts promote a fine-tuning process, in which information about user problems can influence the research in progress, and in which users can be alerted to the likely applicability of the research to yet other problems.

Third, utilization also depends on the vigorous dissemination of project materials—but not necessarily of a research project's final report. The "useful" materials from a research project may often be a handbook, a manual, a questionnaire, and other social science tools that represent the "development" phase of R&D. These are the materials that will be most helpful in assisting service providers.

# EXECUTIVE SUMMARY

## Introduction: What is OARS?

In 1971, a group of investigators at the Center for the Study of Aging and Human Development at Duke University embarked on a research effort ultimately to become identified as the Duke OARS project. Since then, Duke OARS (Older Americans Resources and Services) has become known in the field of gerontology as a method for developing an information system to: (a) determine the levels of functioning of individual elderly persons, (b) match these levels to potential service needs, and (c) analyze this relationship to assess alternative service arrangements. Moreover, the OARS effort can now be regarded as one of the most productive and significant contributions to the field of aging.

The main concrete product of OARS has been a methodological manual. The *OARS Manual* has been issued twice, in 1976 and in 1978.[1] Several thousand copies of both editions have been printed and distributed. A full definition of the OARS effort, however, needs to account for at least three characteristics that are broader than the manual itself: OARS as an assessment instrument, OARS as a resource allocation model, and OARS as a organizational resource at Duke University.

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[1] The two editions are as follows: Eric Pfeiffer (ed.), *Multidimensional Functional Assessment: The OARS Methodology: A Manual*, Duke University, 1976; and Duke University Center for the Study of Aging and Human Development, *Multidimensional Functional Assessment: The OARS Methodology: A Manual*, 1978, 2nd edition.

The *OARS assessment instrument* (the Multidimensional Functional Assessment Questionnaire–MFAQ) is the best known facet of the OARS effort. The instrument consists of about 120 closed-ended questions, used to interview older adults:

- About 70 questions deal with the respondent's level of functioning, covering five major topics: social resources, economic resources, mental health, physical health, and activities of daily living;
- About 25 questions ask the interviewer to rate the respondent's status, on the basis of summary scales for each of the five topics plus the respondent's overall condition; and
- About 25 questions deal with the services currently being received by the respondent.

The *OARS resource allocation model* represents the conceptually significant aspect of OARS, and is the basis for the MFAQ instrument. The full model indicates the entire social system within which local services are provided. The model provides a way of interpreting change in functional status as a result of service utilization. Again, while schematically simple, the model captures the complex relationships among the population, the array of community services, and the individual service "packages" received.[2]

Finally, OARS as an *organizational resource* emerged gradually at Duke's Center for the Study of Aging and Human Development. The organizational unit's identity and exact boundaries have changed from time to time, including the following components and functions: a clinic, related research projects, training, and technical assistance sessions for OARS users, and a data archive of the results of OARS applications.

## OARS as a Research Project

Support for the OARS project was initiated by a grant from the Administration on Aging (AoA), first made on July 1, 1971, and titled the "Evaluation of Protective Services." The ideas for the original proposal resulted from numerous discussions between AoA officials and Duke researchers, in part related to an earlier AoA grant

[2] See George L. Maddox and David C. Dellinger, "Assessment of Functional Status in a Program Evaluation and Resource Allocation Model," *The Annals of the American Academy of Political and Social Science*, July 1978, Vol. 438, pp. 59-70, and Richard M. Burton and David C. Dellinger, "Planning the Care of the Elderly: The Duke OARS Experience," unpublished paper, Duke University, 1980.

made to Duke in 1968. Prominent at one time or another among the Duke researchers were Dr. Ewald Busse and Dr. Carl Eisdorfer, who were the first and second directors of Duke's Center for the Study of Aging and Human Development; Dr. George Maddox, who is the third and present director; and Dr. Eric Pfeiffer, who was the principal investigator for the OARS project.

The discussions reflected a gradual convergence of interest in identifying alternatives to institutionalization of the elderly. As Maddox later reported:

> Not long after my return from sabbatical, a proposal came to the Center from a federal agency to undertake social policy research. The issues were intellectually and politically complex: alternatives to institutionalization of the impaired elderly.[3]

The federal agency, AoA, had been under two types of pressure during these years. First, the rapid increase in nursing homes was becoming too costly, from society's point of view, and had been accompanied by a number of dramatic abuses, involving fires and other health hazards. National attention to the problem culminated with a June 1971 speech by the President of the United States at the joint convention of the National Retired Teachers Association and the American Association of Retired Persons:

> ...if there is any single institution in this country that symbolizes the tragic isolation and shameful neglect of older Americans,... it is the substandard nursing home, and there are some. Some are unsanitary. Some are ill-equipped. Some are overcrowded. Some are understaffed...[4]

In August 1971, the President announced a program to increase support for nursing homes inspectors and to consolidate federal enforcement activities. Nevertheless, the search for alternatives to institutionalization continued to be a priority. Second, AoA, being an agency within Elliot Richardson's Department of Health, Education, and Welfare, was under pressure to rationalize its process for planning research, and to expand the support of research directed at major policy issues.

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[3]George Maddox, introductory remarks in George L. Maddox and Robin B. Karasik (eds.), *Planning Services for Older People: Translating National Objectives into Effective Programs*, Duke University, 1976, p. 4.

[4]Remarks by the President of the United States before the National Retired Teachers Association and American Association of Retired Persons, combined convention, Chicago, June 25, 1971. (*Weekly Compilation of Presidential Documents*, June 28, 1971.)

The initial award by AoA to Duke was for about $100,000, to study the "alternatives" issue. Eventually, AoA also provided two continuation grants; two other federal agencies—the Social and Rehabilitation Service and the Health Resources Administration—also joined AoA in supporting the OARS project. The full funding history for the project is shown in Table 1. Funding support for the original OARS project ended in 1977. Nevertheless, the OARS work has continued at the Duke Center. The Center still responds to inquiries about OARS, provides technical assistance on the MFAQ instrument to new users, conducts workshops and conferences to facilitate interchanges among users, maintains the data archive, and uses the MFAQ instrument in its own clinical operations.

## Uses Made of the OARS Research Project

The OARS methodology, encompassing both the MFAQ instrument and the analytic comparison between levels of functioning and service needs, has been used by a large number of service providers and policymakers during the last few years. At least three types of applications can be distinguished:

- Using OARS to estimate the potential needs for services of elderly populations across the country, with appropriate implications for federal policymaking;
- Using OARS for community planning, in which the instrument is administered to a sample of residents in a community, to determine the potential needs for services for the entire community; and
- Using OARS as an intake instrument, to assess the levels of functioning of individuals entering a specific clinic or service facility.

The following vignettes describe three specific utilization experiences, as illustrative examples (in actuality, there are at least 100 known applications of OARS).

### Vignette No. 1

A major application of the OARS instrument and model has been made by the U.S. General Accounting Office (GAO). The effort resulted from GAO's desire, beginning in 1974, to study the relationship between federal services and the "whole person," and not merely to conduct

TABLE 1
Funding History of OARS Project

| Grant Award or Amendment No | Date | Funding Agency AoA | SRS | HRA | Brief Description of Purpose |
|---|---|---|---|---|---|
| **First Award** | | | | | |
| 93-P-75172/4-01 | 6/71 | $99,682 | | | Eight-month award covered the development of a research design, staff development, Pretesting of research instruments, activation of a Community Advisory Board, and a survey of community resources (The original proposal had covered the first year of a three-year effort for about $183,000.) |
| Amendment 1 | 2/72 | | | | Time extension from February 1972 to March 1972. |
| **Second Award** | | | | | |
| 93-P-75172/4-02 | 4/72 | $330,000 | | | Second year continuation; however, an additional $24,631 represented carryover from first award, so total award statement was for $354,631. |
| Amendment 2 | 10/72 | | | | Amendment to readjust personnel and survey costs. |
| Amendment 2/1 | 11/72 | | | | Amendment to correct typographical errors in second award. |
| Amendment 4 | 4/73 | | | | Time extension from March 1973 to April 1973. |
| **Third Award** | | | | | |
| 93-P-75172/4-03 | 4/73 | $318,658 | $55,000 | | Third year continuation. |
| Amendment 1 | 7/73 | | | | Supplemental award. |
| Amendment 2 | No date | | | | Time extension from April 1974 to June 1974. |
| **Fourth Award** | | | | | |
| 93 P 75172/4-04 | 6/74 | $156,827 | $86,056 | $150,000 | Fourth year continuation. |
| Amendment 1 | 6/75 | | | | Time extension from June 1975 to June 1976. |
| Amendment 2 | 5/76 | $11,775 | | | Supplement for services and consultation to other organizations conducting related investigations on reliability and validity. |
| Amendment 3 | 6/76 | | | $15,000 | Supplement for further analysis of data for the National Center for Health Services Research. |
| Amendment 4 | No date | | | | Time extension to February 1977. |
| TOTAL FUNDING | | $916,942 | $141,056 | $165,000 | |

program-specific evaluations.[5] GAO officials had already designed their study and searched widely for appropriate instruments when they learned about OARS in a January 1975 conference. With assistance from the OARS team at Duke, GAO then used the OARS instrument in its data collection efforts.

In the major data collection effort, GAO's Cleveland field office conducted two waves of interviews, using a random sample of elderly persons living in Cleveland. This interview information was combined with records from 130 local organizations regarding the services provided to this specific sample of persons. The first wave survey was done in mid-1975, with about 1,600 elderly respondents; the second wave survey, involving follow-up interviews of the same respondents, was completed by the end of 1976. As a result of this effort, GAO has been able to answer a wide variety of questions posed by Congressional policymakers, covering the status of the elderly, the services being received by them, and the potential costs of new services still needed.

The GAO also expanded its information base by incorporating the results of surveys done by independent research teams in Lane County, Oregon (a rural-urban area) and the Gateway Health District in Kentucky (a rural area). (GAO officials learned of these other efforts while attending a Duke "OARS Users" Conference in 1978.) The data have been used to address such policy issues as:

- the comparative status of urban and rural elderly populations;
- the potential need for and cost of congregate housing,
- the conditions and needs of people 75 years and older;
- the comparative costs of home and institutionalized health care; and
- the potential usefulness of a national information system on the well-being of the elderly.

## Vignette No. 2

The Benjamin Rose Institute, a private, nonprofit, multi-service agency in Cleveland, Ohio, provides social and health care services to the elderly residing both in institutions and in the community. When the new executive director of the Institute took over in 1978, she

[5] The overall GAO mandate was reinforced by Title VII of the Congressional Budget and Impoundment Act of 1974, P.L. 93-344, July 12, 1974, which established an Office of Program Review and Evaluation in the GAO. This and other details of the GAO-OARS effort were cited in an interview with Mr. William Laurie, now Senior Staff Member, Cleveland Regional Office, U.S. General Accounting Office. Mr. Laurie was the primary official responsible for the entire GAO-OARS effort.

was interested, for planning and evaluation purposes, in obtaining data on the Institute's clients and services in Cleveland. However, standardized, comprehensive data on clients were unavailable, and information on health services and health needs were nonexistent. Consequently, Institute staff were required to conduct a survey of their service population.

In their review of assessment instruments, the Institute staff found the OARS questionnaire to be the most suitable. It was the most comprehensive tool available and could be administered by caseworkers rather than clinicians. But the primary reason for choosing OARS was the existence of a comparison data base established in the GAO study (see Vignette No. 1). The staff could determine whether they were actually helping the more impaired elderly by comparing their findings with those of the Cleveland GAO study.

The OARS questionnaire was administered to all of the Institute's clients (N=600) in the community. OARS was helpful in substantiating many impressions and suppositions held by the research and service staff about client characteristics and about service need and use. The survey findings confirmed that a real need existed for neighborhood-based services, especially transportation and medical services, such as physical therapy.

## Vignette No. 3

The Wisconsin Community Care Organization (CCO) project was established in 1975 to develop a coordinated system of in-home and community services for functionally disabled adults. The goal was to provide alternatives to premature or inappropriate institutionalization in a nursing home. To date, the project has served approximately 2,000 clients and maintains an active caseload of 1,000. The CCO contracts with community agencies to provide specific services related to activities of daily living, including personal care, housekeeping, meal preparation, and transportation. It also coordinates services among community providers, between acute and long-term care systems, and between the client and the service delivery system.

In operating the service, project staff administer a battery of assessment tools to measure changes in a client's condition over time. One such tool used is the OARS instrument. Once the client is determined eligible for the program, the OARS questionnaire is administered at intake as a multidimensional needs assessment. It is then readministered at six-month intervals to review the client's status.

The OARS instrument was chosen because of its comprehensive nature and demonstrated validity and reliability. Although some service practitioners were initially overwhelmed by its length, they now consider it to be a valuable tool, because it forces them to explore all aspects of a client's condition. Due to the design of the instrument, the responses are also considered easy to code.

These utilization experiences, along with the other known applications of the OARS methodology, indicate that the results of the OARS research project have been used under many different practical circumstances.

## Why the OARS Research Project was Useful

The reasons for the utilization of the OARS research are discussed in detail in the full case study. A further purpose of the case study, however, has been to identify more general propositions to improve future utilization strategies for AoA. Moreover, the propositions based on the OARS case study build directly upon those of the previous case study on transportation and the elderly.[6] When viewed together, a potentially consistent pattern emerges for guiding future policymaking.

**Proposition No. 1: Utilization was intensive and extensive because of the development of an informal social network, linking knowledge producers (researchers), and knowledge users (consumers, service providers, and policymakers).** This proposition is almost identical with that from the first case study. In both instances, the proposition reflects the importance of an interactive model of research utilization.

The networking characteristic strikes at the essence of the OARS experience. Throughout the duration of the OARS project, the research involved the development of interpersonal ties, two-way communications, and ultimately a "life of its own" for the project itself. In retrospect, a key characteristic of this networking activity was its diffuseness; a *marketplace* for the exchange of ideas was created. The networking efforts produced numerous contacts, often serendipitously, throughout the life history of the OARS project. With the Duke OARS staff remaining active, the networking continues to this day and facilitates even further utilization of the OARS methodology.

**Proposition No. 2: "Interventions" designed to boost utilization may occur throughout the research process, and not at a single point during a presumed linear sequence.** This proposition is identical with that from the first case study and is entirely congruent with the OARS

[6] See Robert K. Yin and Ingrid Heinsohn, *The Uses of Research Sponsored by the Administration on Aging, Case Study No. 1: Transportation Services for the Elderly*, American Institutes for Research, Washington, D.C., September 1980.

experience. In both cases, a nonlinear sequence of events was found to occur between the conduct of the research and the utilization activities.

For instance, networking started early, even before the first important pieces of the research had been completed, much less reported. Dissemination also started early, with formal presentations at major conferences and workshops devoted to the discussions of the problem being investigated and the approaches being pursued. The nonlinear sequence was also characteristic of later events; specific utilization efforts led to purposeful modifications in the OARS instrument, on a case-by-case basis, in addition, one group of users—the GAO staff—helped to resolve some of the analytic issues that had been left incomplete in the research model, and these improvements have now been transmitted to new users of the OARS method.

Proposition No. 3: Utilization cannot take place without vigorous dissemination of information. The OARS experience again confirms a finding from the first case study. OARS produced a wide array of materials, not limited to research publications, and these materials appear to have played an important role in promoting utilization.

Although utilization requires more than the mere one-way communication of ideas, utilization cannot occur if these ideas are not adequately transmitted—generally in writing—in the first place. For OARS, dissemination has included such "products" as:

- the basic OARS *manual*, which includes instructions, instruments, and supporting articles on various aspects of the OARS method;
- continued items of interest inserted in the *newsletters* produced by Duke's Center for the Study of Aging and Human Development—i.e., "Center Reports," "Advances in Research," and "Information for OARS Users." Each of these newsletters has a mailing list of nearly one thousand individuals and organizations; and
- *data tapes* from previous OARS studies, conducted both by the Duke team and by other organizations, such as GAO. The availability of these data has helped new users to conduct comparative analyses and thus to better interpret their own situations.

Interestingly, in neither the OARS nor the transportation case study was the important dissemination effort focused around a comprehensive *final report*. The types of materials listed above can

all be used much more flexibly, both in time and in the specificity of focus, than can a final report. The OARS project did have a final report, but this was used mainly to satisfy administrative requirements and not for dissemination purposes.

**Proposition No. 4: Utilization was facilitated because the research involved a "synthesis" and "development" activity.** This final proposition may be considered a constraining condition for the preceding utilization lessons. In other words, the types of networking, nonlinear sequence of events, and dissemination activities may be most appropriate where a research project consists of two related characteristics: (1) the project is not aimed at producing a unique set of empirical findings, but represents a synthesis of previous findings; and (2) the outcomes of the research are embodied in products akin to the "development" phase of social R&D—e.g., handbooks, instruments, methods, and other usable tools. (This final proposition is also similar for both case studies, except that the synthesis and development characteristics were considered under separate propositions in the first case study.)

Most research projects in applied social science have not, in fact, been like the OARS and transportation projects. The outcomes or ideas from most projects have generally been reported at a conceptual level that falls short of providing advice for specific implementation activities. The OARS and transportation projects, in contrast, provided adequate conceptual documentation but also yielded materials that were immediately usable in a practice setting. Thus, if a user simply wants to apply the results of the OARS project, the manual and MFAQ instrument are sufficient devices.

The development of such usable tools can only follow effectively where a research project has first synthesized the lessons from previous research. This synthesis process, involving reviews of the literature and discussions with other relevant investigators, assures that the tools will represent the best rendition of the state-of-the-art. An obvious corollary is that the previous research must have been sufficiently advanced to sustain the synthesis effort. For OARS, the use of this prior research is reflected directly in the development of the MFAQ instrument, which was in part based on the prior efforts of others. Where synthesis is possible, the results are more robust than where a research project has produced an entirely new set of empirical findings. The latter are unstable in that they may or may not be corroborated by subsequent research. These discrete findings, therefore, are not the best foundation for immediate application to practical situations.

**Policy Implications.** Because of the congruence of the propositions from both case studies, three general policy implications are worth considering. These implications are the types of guidelines needed to develop improved utilization strategies for future AoA-sponsored research.

The first implication is that utilization strategies may have to be tailored to specific situations. Synthesis and development projects require different strategies than do new empirical analyses. Therefore, an initial step would be to *review the portfolio of AoA-sponsored research and discriminate between "research" and "development" projects.*

The distinction between these two types of projects is not a simple one. In general, however, a "research" project is one where new data collection or empirical analysis is being undertaken. The main products of this type of project are academic publications or other reports mainly intended for research audiences. A "development" project is one where the research activity is designed to produce usable tools, generally on the basis of some synthesis of previous research. The development project may also produce academic publications, but these are the auxiliary rather than the only products from the research.

A second implication is that a research-funding agency such as AoA should *encourage vigorous networking efforts throughout the life history of a development project*. Because the key to the networking efforts appear to be interpersonal relations, and because the networking efforts must be started before any research products have been completed, the networking should be built around individual people and not around specific materials. In other words, a key insight from the case studies is that, *for utilization purposes, the target of intervention may be a person (the research investigator) rather than a product (a research report).*

This second implication leads to a drastically different view of the utilization process. Among other things, the common federal intervention of creating an information clearinghouse (which disseminates written reports) would hardly be a sufficient utilization strategy. In contrast, utilization may only occur effectively as a result of direct contact between user and research, and not merely because of exposure by the user to research reports. Such contact may be seen as performing the following functions:

- researchers and users get to know about each other's existence, facilitating present and future communications about specific, user-related problems;

- researchers and users have opportunities to explain their different orientations to each other, providing the groundwork for more effective subsequent communications;

- researchers are able to communicate directly on those facets of the topic about which a user is most concerned; and

- an individual researcher is able to serve as a "synthesizer" of information relevant to users, in which advice is not only based on the lessons of a single project, but may also reflect the researcher's best wisdom on a topic.

Third, no matter how effective the networking efforts, a research-funding agency such as AoA must also *support the dissemination of project materials*. Because these materials must be made available in a timely and relevant manner, the likely form of these materials will be either the *usable tools* themselves or *brief summaries* that appear in conference proceedings, newsletters, magazines, and other periodicals aimed at service providers and policymakers (and elderly persons and their families) rather than at research audiences.

## PEOPLE INTERVIEWED FOR CASE STUDY

| Name | Present Title | Title During OARS Project |
|---|---|---|
| Elizabeth Benson | Site Coordinator<br>Wisconsin Community Care Organization<br>Madison, Wisconsin | |
| Robert Black | ICF, Inc.<br>Washington, D.C. | Operations Research Assistant<br>Office of Program Planning and Evaluation<br>Social and Rehabilitation Service<br>Washington, D.C. |
| Richard Burton | Associate Professor<br>School of Business Administration<br>Duke University<br>Durham, North Carolina | |
| Gerda Fillenbaum | Senior Fellow<br>Center for the Study of Aging and Human Development<br>Duke University Medical Center<br>Durham, North Carolina | |
| Linda George | Director<br>Data Archive for Aging and Human Development<br>Center for the Study of Aging and Human Development<br>Duke University Medical Center<br>Durham, North Carolina | |
| Marilyn Glascock | Project Coordinator<br>National Indian Council on Aging<br>Albuquerque, New Mexico | |
| Byron Gold | Special Assistant to the U.S. Commissioner on Aging<br>Administration on Aging<br>Washington, D.C. | |
| Susan Lambert | Coordinator<br>L.I.F.E. Daycare Center for Older Adults<br>Concord, North Carolina | |
| William Laurie | Senior Staff Member<br>Cleveland Regional Office<br>United States Accounting Office<br>Cleveland, Ohio | Project Manager<br>Cleveland Regional Office<br>United States Accounting Office<br>Cleveland, Ohio |
| George Maddox | Director<br>Center for the Study of Aging and Human Development<br>Duke University Medical Center<br>Durham, North Carolina | Co-Principal Investigator, 1971 - 1972<br>Principal Investigator, 1972 - 1976 |

## PEOPLE INTERVIEWED FOR CASE STUDY (Continued)

| Name | Present Title | Title During OARS Project |
|---|---|---|
| Paul Nelson | Greene County Commission on Aging<br>Yellow Springs, Ohio | |
| Edward Neuschler | Office of Legislation<br>Health Care Financing Administration<br>Washington, D.C. | Office of Program Planning and Evaluation<br>Social and Rehabilitation Service<br>Washington, D.C. |
| Linda Noelker | The Applied Gerontology Research Center of the Benjamin Rose Institute<br>Cleveland, Ohio | |
| William O'Rourke | Psychiatrist<br>Geriatric, Gerontology Practice<br>Coordinator of Gerontology Program<br>Northern Essex Community College<br>Haverhill, Massachusetts<br><br>Professor<br>University of Lowell<br>Lowell, Massachusetts | |
| Julius Pellegrino | Division of Extramural Research<br>National Center for Health Services Research<br>Health Resources Administration<br>Hyattsville, Maryland | Staff Director<br>Evaluations Section<br>National Center for Health Statistics<br>Health Resources Administration<br>Hyattsville, Maryland |
| Eric Pfeiffer | Director<br>Suncoast Gerontology Center<br>University of South Florida Medical Center<br>Tampa, Florida | Project Director, 1971 - 1972<br>Co-Principal Investigator and Project Director, 1972 - 1976 |
| Martin Sicker | Associate Bureau Chief for Policy<br>Bureau of Private Radio<br>Federal Communications Commission<br>Washington, D.C. | Director<br>Office of Research, Demonstrations, and Manpower Resources<br>Administration on Aging<br>Washington, D.C. |
| K. Mary Straub | Nurse Consultant<br>Reimbursement Branch<br>Division of Longterm Care<br>Health Care Financing Administration<br>Baltimore, Maryland | Division of Longterm Care<br>National Center for Health Services Research<br>Health Resources Administration<br>Hyattsville, Maryland |
| Ryland Swain | | Project Officer<br>Administration on Aging<br>Washington, D.C. |
| Marvin Taves | Director<br>Division of Model Projects and Demonstrations<br>Administration on Aging<br>Washington, D.C. | Chief<br>Research Applications and Demonstration Division<br>Administration on Aging<br>Washington, D.C. |
| Howard White | Special Assistant to the Associate Commissioner for Research, Demonstrations, and Evaluation<br>Administration on Aging<br>Washington, D.C. | Chief<br>Evaluation Division<br>Administration on Aging<br>Washington, D.C. |