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Record Group/Collection: Donated Historical Materials
Collection/Office of Origin: Frieden, Lex, Collection
Series: Related Materials
Subseries: Grants

OA/ID Number: 52088
Folder ID Number: 52088-004

Folder Title:

I.L. [Independent Living] Training Grant R.S.A. Rehabilitation Services Administration] 1977

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Withdrawal/Redaction Sheet (George Bush Library)

Doc. No. / Type	Subject/Title	Date	Restriction	Classification
01. Resume	Resume [redaction] (2 pp.)	6/1/77	C	
02. Resume	Curriculum Vitae [redaction] (1 pp.)	n.d.	C	
03. Resume	Curriculum Vitae [redaction] (1 pp.)	n.d.	C	

Page 1 of 1

Collection:

Record Group: Donated Historical Materials

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File Location: I.L. [Independent Living] Training Grant R.S.A. Rehabilitation Services Administration] 1977

Pinksheet Number: MB10693

OA/ID Number: 52088-004

Date Closed: 8/17/2016

FOIA/Sys Case #: 2016-2624-S

Re-review Case #:

P-2/P-5 Review Case #:

TEXAS INSTITUTE FOR REHABILITATION AND RESEARCH
IN THE
TEXAS MEDICAL CENTER
1333 MOURSUND AVENUE
HOUSTON, TEXAS 77030
October 5, 1977

P. O. Box 20095
Houston, Texas 77025

Telephone
Area Code 713, 797-1440

Mr. Joseph A. Mottola
Acting Commissioner of Rehabilitation Services
330 "C" Street S.W.
Washington, D.C. 20201

Dear Mr. Mottola:

We are in receipt of your letter of September 27 authorizing approval of Grant #22-P-59106/6-01, "Independent Living: A Model Training Program to Foster Research Utilization and Program Development".

We deeply appreciate your favorable attention to this program of dissemination and utilization of research and demonstration results in the field of independent living, to which we are deeply committed.

Sincerely,


William A. Spencer, M.D. *ms*
President

WAS:mk

CC: Dr. Jean Cole ✓
Mr. Tim Muzzio

Rehabilitation Services Administration

Our Reference: 22-P-59106/6-01

William A. Spencer, M.D., President
Texas Institute for Rehabilitation
and Research
1333 Moursund Avenue
Houston, Texas 77030

RECEIVED SEP 27 1977
T. I. R. R.
HOUSTON TEXAS

OCT 5 1977

A.M. P.M.
7|8|9|10|11|12|1|2|3|4|5|6

Dear Dr. Spencer:

I am pleased to advise you that your application for the above referenced grant entitled, "Independent Living: A Model Training Program to Foster Research Utilization and Program Development," has been approved. The Notice of Grant Awarded is enclosed.

Questions concerning any program or technical aspects of your project should be referred to Mr. Tim Muzzio at 202-245-0516. Any fiscal or administrative problems should be referred to Mr. Leo J. Eger at 202-245-0474.

The financial report for the 01 grant budget period will be due December 30, 1978. Enclosed is a report form. The completed form should be returned to the following address:

Division of Grants and Contracts
Office of Human Development
Mary E. Switzer Memorial Building, Room 1427
330 "C" Street, S. W.
Washington, D. C. 20201

Sincerely,

Joseph A. Mottola
Acting Commissioner of
Rehabilitation Services

Enclosures

cc: Dr. Jean Cole
Regional Office
Mr. Tim Muzzio
Mr. A. Rotundo

NOTICE OF GRANT AWARDED

1. GRANTING OFFICE Rehabilitation Services Administration	2. CATALOG NO. 13.627	3. GRANT NO. 22-P-59106/6-01	4. AMEND. NO.
5. TYPE OF GRANT AWARDED Under Authority of P.L. 93-112, as amended to Pertinent DHEW & OHD Regulations and Policies Applicable to: <input checked="" type="checkbox"/> RESEARCH GRANT <input type="checkbox"/> DEMONSTRATION GRANT <input type="checkbox"/> TRAINING GRANT <input type="checkbox"/> SERVICE GRANT <input type="checkbox"/> OTHER _____ (Specify)		6. BUDGET PERIOD: FROM 9/29/77 THROUGH 9/30/78 7. TOTAL PROJECT PERIOD: FROM 9/29/77 THROUGH 9/30/78 8. TYPE OF GRANT <input checked="" type="checkbox"/> NEW <input type="checkbox"/> COMPETING EXTENSION <input type="checkbox"/> CONTINUATION <input type="checkbox"/> SUPPLEMENT <input type="checkbox"/> REVISION FOR () See Reverse for explanation	

9. PROJECT/PROGRAM TITLE **Independent Living: A Model Training Program to Foster Research Utilization and Program Development**

10. GRANTEE ORGANIZATION
Texas Institute for Rehabilitation and Research
1333 Moursund Avenue
Houston, Texas 77030

11. PRINCIPAL INVESTIGATOR OR PROGRAM DIRECTOR
Jean A. Cole, Ph.D.
13. CONGR. DISTRICT **22**
14. COUNTY **Harris**

12. APPROVED BUDGET

PERSONNEL	\$ 30,380
FRINGE BENEFITS	0
TRAVEL	2,400
EQUIPMENT	0
SUPPLIES	1,000
CONTRACTUAL	18,000
OTHER	37,587
TRAINEE STIPENDS (No.)	
DEPENDENCY ALLOWANCE	
TRAINEE TUITION & FEES	
DIRECT COSTS	\$ 89,367
INDIRECT COSTS	10,420
CALCULATED AT <u>34.3</u> OF (\$ <u>30,380</u>)	
TOTAL FEDERAL APPROVED BUDGET	\$ 99,787

15. AWARD COMPUTATION

A. TOTAL FEDERAL APPROVED BUDGET	\$ 99,787
B. UNOBLIGATED BALANCE FROM PRIOR BUDGET PERIOD(S)	\$
C. TOTAL AMOUNT AWARDED THIS BUDGET PERIOD	\$ 99,787

16. AMOUNT AWARDED - THIS ACTION **\$ 99,787**

17. TOTAL GRANTEE PARTICIPATION **Minimum of 5% of total allowable project costs required**

18. SUPPORT RECOMMENDED FOR REMAINDER OF PROJECT PERIOD
PERIOD _____ TOTAL FEDERAL COSTS _____
None

19. REMARKS
This award will be paid through DEAFS. (See attached instructions.)
RSA GRANTS OFFICER

20. CAN NO. 71994602	21. APPROP. NO. 7571636	22. APPLICANT EIN 171-133-167-841
Albert Rotundo ALBERT ROTUNDO 7-77	23. OBJECT CLASS 17 17	24. PAYEE EIN Same

25. Signature - OHD GRANTS OFFICER
Elizabeth A. Krone 9/27/77

26. Signature - CERTIFYING OFFICER
Berwick A. Dravis 9/27/77

27. SIGNATURE AND TITLE - PROGRAM OFFICIAL
SEP 27 1977
Acting Commissioner of Rehabilitation Services

BOB ECKHARDT
8TH DISTRICT, TEXAS

COMMITTEE ON
INTERSTATE AND FOREIGN
COMMERCE
CHAIRMAN
SUBCOMMITTEE ON
CONSUMER PROTECTION AND FINANCE



COMMITTEE ON
INTERIOR AND INSULAR AFFAIRS

SUBCOMMITTEES:
NATIONAL PARKS AND INSULAR AFFAIRS
ENERGY AND THE ENVIRONMENT
MINES AND MINING

CONGRESS OF THE UNITED STATES
HOUSE OF REPRESENTATIVES
WASHINGTON, D.C. 20515

October 6, 1977

Dr. Jean A. Cole
Texas Institute for Rehabilitation
and Research
1333 Moursund Avenue
Houston, Texas 77030

Dear Dr. Cole:

I wanted to congratulate you on your recent research grant from the Rehabilitation Services Administration. I am certain that your program is quite deserving.

My very best wishes and good luck to you.

Sincerely,

A handwritten signature in cursive script, appearing to read "Bob Eckhardt".

Bob Eckhardt

memorandum

To: Jean Cole, Ph.D.
Mr. Lex Frieden ✓

From: Mark Fuhrer, Ph.D. *MF*

Date: 23 June, 1977

Congratulations to you both for having generated a really solid grant application to RSA. It is one of those cases where the proposed work is much more effectively thought out than the "request for proposal" that provoked it.

One fundamental mistake may have been made. Considering the proposal's quality and the rapidity with which it was put together, it may occur to RSA that there is an inverse relationship between quality and time-available-for preparation. On this basis, I can easily imagine RSA going to a 24-hour solicitation-and-response cycle. And to think that the field will have you both to thank.

OFFICE OF THE SECRETARY
Office of Human Development
Rehabilitation Services Administration

TO : State Rehabilitation Agencies (General)
State Rehabilitation Agencies (Blind)
Assistant Regional Directors, OHD
Directors, ORS
RT Center Directors

DATE: May 11, 1977

Mr. Friedman

FROM : Executive Director for Research & Evaluation, RSA

SUBJECT: Solicitation of FY'77 R&D Applications

Enclosed is a draft of the Program Announcement which was recently published in the Federal Register. The announcement indicates the availability of \$3.4 million for 27 new and competing extension research and demonstration projects in FY 1977.

I would like to encourage each of you to bring this announcement to the attention of any potential applicant who you feel has the ability to develop a proposal around one of the priorities in a sound manner. We hope that a number of applications will be received for each priority. In that way we can all be assured that only the strongest proposals that the field can generate will be funded.

The time frame is tight. Even so, I know that any efforts you can make in securing good applications, will contribute substantially to the strengthening of our research program.

Jim
James F. Garrett

RECEIVED

HOUSTON TEXAS

MAY 18 1977

A.M. P.M.
7|8|9|10|11|12|1|2|3|4|5|6

A

SUMMARY STATEMENT

DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE

Office of Human Development

Rehabilitation Services Administration

RESEARCH AND DEMONSTRATIONS

HEW/RSA announces competition for new grants; closing date of

June 20, 1977 for receipt of applications

DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE

Office of Human Development

Rehabilitation Services Administration

RESEARCH AND DEMONSTRATIONS IN

VOCATIONAL REHABILITATION

Announcement of Grants for FY '77 (Program Announcement No. 13627-772)

The Rehabilitation Services Administration, Office of Human Development, announces that applications will be accepted until June 20, 1977, from State vocational rehabilitation agencies and other public or nonprofit agencies or organizations wishing to compete for grants in Fiscal Year 1977 under the Research and Demonstration Projects for Vocational Rehabilitation authorized by Title II, section 202(a) of the Rehabilitation Act of 1973, as amended (29 U.S.C. 762) to assist in the rehabilitation of handicapped individuals.

All applications received by the closing date which are complete and conform to the requirements of this program announcement will be accepted for review and consideration for award.

Regulations applicable to this program were published in the Federal Register in Subpart A and Subpart D of Part 1362 of Chapter XIII of Title 45 of the Code of Federal Regulations (45 CFR Part 1362) on November 25, 1975.

Scope of this Program Announcement : This program announcement identifies general program objectives and funding priorities of the Research and Demonstration Projects for Vocational Rehabilitation for Fiscal Year 1977. Competitions in special emphasis areas will be announced separately in the Federal Register.

A. Program Purpose

The purpose of the Research and Demonstration Program in Vocational Rehabilitation is to conduct research, design demonstration projects, and plan related activities which bear directly on the development of methods, procedures and devices to assist in the provision of vocational rehabilitation services to handicapped individuals, especially the most severely handicapped ones.

Grants made under Title II, Section 202(a), research, test and demonstrate new methods, systems and approaches that can be used promptly, effectively and efficiently.

B. Eligible Applicants

Any State vocational rehabilitation agency, and other public or nonprofit agency or organization, including institutions of higher learning may apply for a grant under this announcement.

C. Available Funds

Of the \$29 million appropriated by the Congress for research and demonstration projects in Fiscal Year 1977, the Rehabilitation Services Administration expects to award an estimated \$3.4 million for new and competing extension grants in the program areas identified below.

It is expected that some 27 grants will be awarded pursuant to this announcement. The range of funds per grant is expected to be from \$50,000 to \$200,000, with the average award expected to be \$126,000.

Generally, projects will be supported for periods of one to five years.

The funds currently available will sustain the budget for the first year of the project. Support of any additional time remaining in the project period will depend on funds available, the grantee's satisfactory performance in achieving the project objectives for which the grant was awarded, and the grantee's continued assurance of supporting the priorities of the Rehabilitation Research and Demonstration Program.

D. Project Objectives and Funding Priorities

Research and demonstration projects in vocational rehabilitation are intended to discover new knowledge and to overcome knowledge gaps in significant areas by the development of methods, procedures and devices to assist in the provision of vocational rehabilitation services to disabled individuals, especially those with severe handicaps. The primary function of research is to make service delivery more effective.

Fiscal Year 1977 project objectives and funding priorities have been developed for the following research areas. These have been developed to enable applicants to be responsive to the information and service needs of the Rehabilitation Services Administration. The number after each funding priority should be included in any inquiries regarding a specific research objective:

1. UNIVERSE OF NEEDS

Objective: To review current research efforts on conceptualization of disability based on functional limitations; categorize current efforts; identify approaches which have the greatest promise for assisting in the planning and delivery of vocational rehabilitation services; and prioritize gaps in research so that future efforts may address them.

Funding priority: Priority will be given to those applications which address the above objective in terms of: Function limitations: State of the Art Review. (A-3)

(A conference of investigators who are researching functional limitations will be organized as a part of the project effort.)

(Cole, Stock, Frieden, Spencer for satellite program and extended New Options)

10. RESEARCH AND EVALUATION UTILIZATION

Objective #2: To establish a National Rehabilitation Information Center, including establishing a collection of information, a catalogue of information, circulation and copy services, access to computerized data, and dissemination procedures for summaries of new R&D reports.

Funding priority: Funding priority will be given to those applications which address the above objective in terms of: National Rehabilitation Information Center (S-23)

(Frieden, Rossi, Spencer)

E. The Application Process

Application Submission: In order to be considered for a grant under the Rehabilitation Research and Demonstration Program, all applications must be submitted on standard forms available from the Division of Grants and Contract Management, Office of Human Development. The application shall be executed by an individual authorized to act for the applicant agency and to assume the obligations imposed by the terms and conditions of the grant award, including the regulations for projects on Rehabilitation Research and Demonstrations.

One signed original and three copies of the grant application, including all attachments, are required. The original and two copies, which are for review purposes, are to be submitted to the central receiving office of the Office of Human Development. The other copy is to be submitted concurrently to the cognizant State Vocational Rehabilitation Agency. This agency reviews the applications and forwards its comments to the Commissioner.

Application Consideration: The Commissioner determines the final action to be taken with respect to each grant application. Applications in response to this announcement which are late are not accepted and applicants are notified accordingly. Otherwise, all applications will be considered for funding.

All accepted applications are subjected to a competitive review and evaluation conducted by qualified persons outside of Federal employment. The results of the competitive review supplement and assist the Commissioner's consideration of the competing applications. The Commissioner's consideration also takes into account the comments of the State Agencies of Vocational Rehabilitation, the HEW Regional Offices and the headquarters program office. Comments on the applications may also be requested from appropriate specialists and consultants inside and outside of the Government.

When the Commissioner has reached a decision either to disapprove or not to fund a competing grant application, the unsuccessful applicant is notified of that decision.

Grant Awards: The Commissioner makes grant awards consistent with the purposes of the Act, the regulations, and program announcements within the limits of Federal funds available for the purpose of supporting Rehabilitation Research and Demonstration projects. The official grant award document is the Notice of Grant Awarded. The Notice of Grant Awarded sets forth in writing to the grantee the amount of funds granted, the purpose of the grant, the terms and conditions of the grant award, the effective date of the award, the budget period for which support is given and the total grantee participation, if any. The initial award also specifies the total project period for which support is contemplated.

F. Criteria for Review and Evaluation of Applications

Competing grant applications will be reviewed and evaluated by persons outside of the Rehabilitation Research and Demonstrations Office against the following criteria:

1. The project objectives address the RSA objectives listed above in this program announcement and those stated in the application package relating to the specific funding priority.

2. The project objectives focus on the development of new or innovative techniques to achieve the RSA project objective(s).

3. The application contains a substantive plan for dissemination of findings to potential users including feedback mechanisms on use and specific outcomes.

4. The project findings will be presented so that they are immediately implementable.

5. The hypotheses to be tested in each project are clearly stated so that the findings relate directly to the project objective(s).

6. The application contains a plan for the thorough review and analysis of literature related to the project.

7. The project's proposed design is complete and feasible, includes measurable objectives and an evaluation component.

8. The project's proposed staff is capable; the staffing pattern appropriate and the applicant organization's facilities and resources are adequate.

9. Applicant organization has a good track record in the conduct of similar and related activities.

10. Project's budget is feasible, and reasonable; all costs are well justified in relation to anticipated project results.

11. Project seems likely to be completed within the proposed time schedule.

12. Projects which will utilize other public resources (in addition to this grant) will receive special consideration.

13. Project does not supplant activities which are funded under other Federal programs (DDO, AoA, VA, etc.....)

G. Closing Date for Receipt of Applications.

The closing date for receipt of applications under this program announcement is June 20, 1977. Applications may be mailed or hand delivered to: Receiving Office; Division of Grants and Contracts Management; Office of Human Development, DHEW; Room 1427, Mary E. Switzer Building; 330 C Street, S.W.; Washington, D.C. 20201 (Attention: 13627-772). Hand delivered applications are accepted during normal working hours of 9:00 a.m. to 5:00 p.m.

An application will be considered to have arrived by the closing date if:

1. The application was sent by registered or certified mail no later than June 20 as evidenced by the U.S. Postal Service postmark or the original receipt from the U.S. Postal Service;
2. The application is sent by mail and received on or before the closing date in the Department of Health, Education, and Welfare, the Office of Human Development, or the Rehabilitation Services Administration mailrooms as evidenced by the time date stamp or other documentary evidence of receipt maintained by such mailroom, or
3. The application is hand delivered to the office designated to receive the application in the application instructions. Hand delivered applications will be accepted no later than COB June 20, in any case.

H. Late Applications

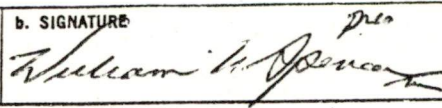
Late Applications will not be accepted and applicants will be notified accordingly.

I. Availability of Application Forms

Application kits which contain the prescribed application forms, the project description, and information for the application may be obtained by making a request, containing the funding priority, and number to:

Division of Grants and Contract Management
Office of Human Development
Room 1427, Mary E. Switzer Building
330 C Street, S.W.
Washington, D.C. 20201

Attention: (13627-772)

FEDERAL ASSISTANCE		2. APPLICANT'S APPLICATION	a. NUMBER	3. STATE APPLICATION IDENTIFIER	a. NUMBER
1. TYPE OF ACTION <input type="checkbox"/> PREAPPLICATION <input checked="" type="checkbox"/> APPLICATION (Mark appropriate box) <input type="checkbox"/> NOTIFICATION OF INTENT (Opt.) <input type="checkbox"/> REPORT OF FEDERAL ACTION		Leave Blank	b. DATE Year month day 19	b. DATE Year month day ASSIGNED 19	
4. LEGAL APPLICANT/RECIPIENT a. Applicant Name : Texas Institute for Rehabilitation & Research b. Organization Unit : c. Street/P.O. Box : 1333 Moursund Avenue d. City : Houston e. County : Harris f. State : Texas g. ZIP Code: 77030 h. Contact Person (Name & telephone No.) : Jean Cole, Ph.D.; Lex Frieden (713) 797-1440, Ext. 504			5. FEDERAL EMPLOYER IDENTIFICATION NO. 74-1334678 6. PROGRAM (From Federal Catalog) a. NUMBER b. TITLE Rehabilitation Research and Demonstration		
7. TITLE AND DESCRIPTION OF APPLICANT'S PROJECT RFP S-20 (13 May 1977) "Independent Living: A Model Training Program to Foster Research Utilization and Program Development" For description, please refer to Remarks.			8. TYPE OF APPLICANT/RECIPIENT A-State H-Community Action Agency B-Interstate I-Higher Educational Institution C-Substate J-Indian Tribe District K-Other (Specify): D-County Non-profit rehabilitation center E-City Enter appropriate letter <input checked="" type="checkbox"/> K F-School District G-Special Purpose District		
10. AREA OF PROJECT IMPACT (Names of cities, counties, States, etc.) National		11. ESTIMATED NUMBER OF PERSONS BENEFITING Indeterminant		9. TYPE OF ASSISTANCE A-Basic Grant D-Insurance B-Supplemental Grant E-Other Enter appropriate letter(s) <input type="checkbox"/> A C-Loan	
13. PROPOSED FUNDING a. FEDERAL \$ 108,478 .00 b. APPLICANT .00 c. STATE .00 d. LOCAL .00 e. OTHER .00 f. TOTAL \$ 108,478 .00		14. CONGRESSIONAL DISTRICTS OF: a. APPLICANT 22 b. PROJECT 22 16. PROJECT START DATE Year month day Est. 19 77 9 1 17. PROJECT DURATION 12 Months 18. ESTIMATED DATE TO BE SUBMITTED TO FEDERAL AGENCY 19 77 6 20		12. TYPE OF APPLICATION A-New C-Revision E-Augmentation B-Renewal D-Continuation Enter appropriate letter <input type="checkbox"/> A 15. TYPE OF CHANGE (For 12c or 12e) A-Increase Dollars F-Other (Specify): B-Decrease Dollars C-Increase Duration D-Decrease Duration E-Cancellation Enter appropriate letter(s) <input type="checkbox"/>	
19. FEDERAL AGENCY TO RECEIVE REQUEST (Name, City, State, ZIP code) Rehabilitation Services Administration; 330 C St., Wash., D.C.				21. REMARKS ADDED <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
22. THE APPLICANT CERTIFIES THAT a. To the best of my knowledge and belief, data in this preapplication/application are true and correct, the document has been duly authorized by the governing body of the applicant and the applicant will comply with the attached assurances if the assistance is approved. (1) NA (2) (3)		b. If required by OMB Circular A-95 this application was submitted, pursuant to instructions therein, to appropriate clearinghouses and all responses are attached: No response <input type="checkbox"/> Response attached <input type="checkbox"/>			
23. CERTIFYING REPRESENTATIVE a. TYPED NAME AND TITLE William A. Spencer, M.D., President		b. SIGNATURE 		c. DATE SIGNED Year month day 19 77 JUNE 17	
24. AGENCY NAME		25. ORGANIZATIONAL UNIT		27. ADMINISTRATIVE OFFICE	
26. ADDRESS		28. FEDERAL APPLICATION IDENTIFICATION		29. FEDERAL GRANT IDENTIFICATION	
31. ACTION TAKEN <input type="checkbox"/> a. AWARDED <input type="checkbox"/> b. REJECTED <input type="checkbox"/> c. RETURNED FOR AMENDMENT <input type="checkbox"/> d. DEFERRED <input type="checkbox"/> e. WITHDRAWN		32. FUNDING a. FEDERAL \$.00 b. APPLICANT .00 c. STATE .00 d. LOCAL .00 e. OTHER .00 f. TOTAL \$.00		33. ACTION DATE 19 34. STARTING DATE Year month day 19 35. CONTACT FOR ADDITIONAL INFORMATION (Name and telephone number) 36. ENDING DATE Year month day 19 37. REMARKS ADDED <input type="checkbox"/> Yes <input type="checkbox"/> No	
38. FEDERAL AGENCY A-95 ACTION		a. In taking above action, any comments received from clearinghouses were considered. If agency response is due under provisions of Part 1, OMB Circular A-95, it has been or is being made.		b. FEDERAL AGENCY A-95 OFFICIAL (Name and telephone no.)	

SECTION I—APPLICANT/RECIPIENT DATA

SECTION II—CERTIFICATION

SECTION III—FEDERAL AGENCY ACTION

SECTION IV-REMARKS *(Please reference the proper item number from Sections I, II or III, if applicable)*

7. Title and Description of Applicant's Project: RFP S-20 (13 May 1977)

"Independent Living: A Model Training Program to Foster Research Utilization and Program Development"

The proposed research utilization project will develop a method for improving the spread and utilization of research and demonstration results in the field of independent living. Persons in this field from around the country will work together to develop a standardized and coherent body of information on independent living as a basis for a model training program directed toward severely handicapped individuals, public and private agency personnel, voluntary and professional organizations, and service facilities.

PART II

PROJECT APPROVAL INFORMATION

Item 1.
 Does this assistance request require State, local, regional, or other priority rating? _____ Yes No
 Name of Governing Body _____
 Priority Rating _____

Item 2.
 Does this assistance request require State, or local advisory, educational or health clearances? _____ Yes No
 Name of Agency or Board _____
 (Attach Documentation)

Item 3.
 Does this assistance request require clearinghouse review in accordance with OMB Circular A-95? _____ Yes No
 (Attach Comments)

Item 4.
 Does this assistance request require State, local, regional or other planning approval? _____ Yes No
 Name of Approving Agency _____
 Date _____

Item 5.
 Is the proposed project covered by an approved comprehensive plan? _____ Yes No
 Check one: State
 Local
 Regional
 Location of Plan _____

Item 6.
 Will the assistance requested serve a Federal installation? _____ Yes No
 Name of Federal Installation _____
 Federal Population benefiting from Project _____

Item 7.
 Will the assistance requested be on Federal land or installation? _____ Yes No
 Name of Federal Installation _____
 Location of Federal Land _____
 Percent of Project _____

Item 8.
 Will the assistance requested have an impact or effect on the environment? _____ Yes No
 See instructions for additional information to be provided.

Item 9.
 Will the assistance requested cause the displacement of individuals, families, businesses, or farms? _____ Yes No
 Number of:
 Individuals _____
 Families _____
 Businesses _____
 Farms _____

Item 10.
 Is there other related assistance on this project previous, pending, or anticipated? _____ Yes No
 See instructions for additional information to be provided.

PART III - BUDGET INFORMATION

SECTION A - BUDGET SUMMARY

Grant Program, Function or Activity (a)	Federal Catalog No. (b)	Estimated Unobligated Funds		New or Revised Budget		
		Federal (c)	Non-Federal (d)	Federal (e)	Non-Federal (f)	Total (g)
1. Rehabilitation Research & Demonstration	13.627	\$ NA	\$ NA	\$108,478	\$	\$108,478
2.						
3.						
4.						
5. TOTALS		\$	\$	\$108,478	\$	\$108,478

SECTION B - BUDGET CATEGORIES

6. Object Class Categories	- Grant Program, Function or Activity				Total (5)
	(1)	(2)	(3)	(4)	
a. Personnel	\$ 30,380	\$	\$	\$	\$
b. Fringe Benefits					
c. Travel	2,400				
d. Equipment					
e. Supplies	1,000				
f. Contractual	18,000				
g. Construction					
h. Other	46,065				
i. Total Direct Charges	97,845				
j. Indirect Charges	10,633				
k. TOTALS	\$108,478	\$	\$	\$	\$
7. Program Income	\$	\$	\$	\$	\$

SECTION C - NON-FEDERAL RESOURCES

(a) Grant Program	(b) APPLICANT	(c) STATE	(d) OTHER SOURCES	(e) TOTALS
8. NA	\$	\$	\$	\$
9.				
10.				
11.				
12. TOTALS	\$	\$	\$	\$

SECTION D - FORECASTED CASH NEEDS

	Total for 1st Year	1st Quarter	2nd Quarter	3rd Quarter	4th Quarter
13. Federal	\$ 108,478	\$ 11,528	\$ 44,429	\$ 35,993	\$ 16,528
14. Non-Federal					
15. TOTAL	\$ 108,478	\$ 11,528	\$ 44,429	\$ 35,993	\$ 16,528

SECTION E - BUDGET ESTIMATES OF FEDERAL FUNDS NEEDED FOR BALANCE OF THE PROJECT

(a) Grant Program	FUTURE FUNDING PERIODS (YEARS)			
	(b) FIRST	(c) SECOND	(d) THIRD	(e) FOURTH
16. NA (one year project)	\$	\$	\$	\$
17.				
18.				
19.				
20. TOTALS	\$	\$	\$	\$

SECTION F - OTHER BUDGET INFORMATION

(Attach additional Sheets If Necessary)

21. Direct Charges: See attached Budget Justification.
22. Indirect Charges: By previous agreement, indirect charges are 35% of salaries and wages (\$30,380) or \$10,633.
23. Remarks:

PART V

ASSURANCES

The Applicant hereby assures and certifies that he will comply with the regulations, policies, guidelines, and requirements including OMB Circulars Nos. A-87, A-95, and A-102, as they relate to the application, acceptance and use of Federal funds for this Federally assisted project. Also the Applicant assures and certifies with respect to the grant that:

1. It possesses legal authority to apply for the grant; that a resolution, motion or similar action has been duly adopted or passed as an official act of the applicant's governing body, authorizing the filing of the application, including all understandings and assurances contained therein, and directing and authorizing the person identified as the official representative of the applicant to act in connection with the application and to provide such additional information as may be required.
2. It will comply with Title VI of the Civil Rights Act of 1964 (P.L. 88-352) and in accordance with Title VI of that Act, no person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any program or activity for which the applicant receives Federal financial assistance and will immediately take any measures necessary to effectuate this agreement.
3. It will comply with Title VI of the Civil Rights Act of 1964 (42 USC 2000d) prohibiting employment discrimination where (1) the primary purpose of a grant is to provide employment or (2) discriminatory employment practices will result in unequal treatment of persons who are or should be benefiting from the grant-aided activity.
4. It will comply with requirements of the provisions of the Uniform Relocation Assistance and Real Property Acquisitions Act of 1970 (P.L. 91-646) which provides for fair and equitable treatment of persons displaced as a result of Federal and federally assisted programs.
5. It will comply with the provisions of the Hatch Act which limit the political activity of employees.
6. It will comply with the minimum wage and maximum hours provisions of the Federal Fair Labor Standards Act, as they apply to hospital and educational institution employees of State and local governments.
7. It will establish safeguards to prohibit employees from using their positions for a purpose that is or gives the appearance of being motivated by a desire for private gain for themselves or others, particularly those with whom they have family, business, or other ties.
8. It will give the grantor agency or the Comptroller General through any authorized representative the access to and the right to examine all records, books, papers, or documents related to the grant.
9. It will comply with all requirements imposed by the Federal grantor agency concerning special requirements of law, program requirements, and other administrative requirements approved in accordance with Office of Management and Budget Circular No. A-102.

SECTION F: BUDGET JUSTIFICATION

(a) Personnel

Principal Investigator (Cole)	15% time	\$ 3,180
Principal Investigator (Frieden)	15% time	\$ 2,000

Jointly responsible for overall planning and direction of project, recruitment of consultants, initiation of cooperative relationships with agencies.

Project Coordinator (Lewis)	100% time	\$12,000
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Responsible for planning workshops and research utilization conference, maintaining liaison with consultants and cooperating agencies, preparation of written and audio-visual materials.

Research Assistant (Russell)	50% time	\$ 4,800
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Responsible for accumulating and abstracting materials on independent living, providing general assistance to project coordinator (graduate student).

Secretary (one full-time equivalent)		\$ 8,400
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Responsible for routine secretarial duties as well as assistance in preparing training materials

TOTAL PERSONNEL EXPENSE		\$30,380
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(b) Fringe Benefits

Included in indirect costs.

(c) Travel

Travel by each principal investigator to serve as a consultant in implementing training program on independent living in various agencies.		\$ 2,400
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(d) Equipment

Not applicable.

SECTION F: BUDGET JUSTIFICATION (Continued)

(e) Supplies

Supplies used in operation of project offices and in production of training materials. \$ 1,000

(f) Contractual

Contracts to be made with six selected independent living projects to produce videotapes for training program (six videotapes @\$3,000 each) \$18,000

(g) Construction

Not applicable.

(h) Other

Advisory Committee Planning Workshop

A two-day workshop to be held in Houston involving 15 selected experts in the field of independent living (12 Americans, 3 persons representing European independent living programs in Sweden, France, and the Netherlands).

Consultant Fees (\$150 per day x 2 days)	\$ 4,500
Air travel (Americans)	4,000
Air travel (Europeans)	4,000
Per diem (room and meals @\$50 per day)	1,500
Ground transportation	400
Workshop materials	<u>500</u>
TOTAL WORKSHOP EXPENSE	\$14,900

SECTION F: BUDGET JUSTIFICATION (Continued)

National Research Utilization Conference
on Independent Living

A two-and-a-half day conference to be held in Houston involving 30 persons who represent severely handicapped individuals, Rehabilitation Services Administration regional offices, Federal, Regional and State level research utilization specialists, State vocational rehabilitation agencies, other human service agencies, voluntary organizations, and service providers.

Air travel	\$14,000
Per diem (rooms and meals)	4,500
Ground transportation	1,200
Meeting rooms	865
Consulting fees for faculty	1,500
Conference materials	<u>2,400</u>
TOTAL CONFERENCE EXPENSE	\$24,465

Pilot Training Seminar

A workshop for State vocational rehabilitation agency personnel to evaluate and refine the independent living training program. Expenses to be shared cooperatively as in previous joint training efforts.

Duplicating and materials	\$ 500
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General Operating Expenses

Office space	\$ 1,200
Telephone	600
Printing and duplicating	1,700
Local videotaping	<u>500</u>
TOTAL ROUTINE OPERATING EXPENSE	\$ 4,000

SECTION F: BUDGET JUSTIFICATION (Continued)

Production of Final Report

Final report on planning workshop, research utilization conference, pilot training workshop, and general project results.

\$ 4,500

(i) Total Direct Charges

\$97,845

(j) Indirect Charges

Calculated by previous agreement as 35% of salaries and wages (\$30,380)

\$10,633

TOTAL BUDGET

\$108,478

PART IV
PROJECT NARRATIVE

1. PROJECT TITLE
2. RESEARCH AND DEMONSTRATION ISSUE
3. PROJECT OBJECTIVES
4. WORK PLAN - TASK DESCRIPTIONS
5. METHODOLOGY
6. UTILIZATION PLAN
7. COST BENEFIT MEASURES
8. BACKGROUND
9. REVIEW OF APPROPRIATE LITERATURE

APPENDICES

1. PROJECT TITLE

Independent Living: A Model Training Program to Foster
Research Utilization and Program Development

2. R&D ISSUE

This project has been planned to address the issue of Research and Evaluation utilization as it relates to independent living programs in rehabilitation. More directly the proposed project seeks to develop a cost effective model for broad-based inter-disciplinary training programs which would transfer relevant skills and information acquired by the developers of independent living programs to persons with less experience in the field who are interested in becoming more involved in independent living program development.

This project will address several RSA RU research objectives:

- (1) It will provide a national forum for dissemination of recent R&D findings in the area of independent living.
- (2) It will involve potential users in planning and proposing standardized data reporting and information acquisition formats in the area of independent living.
- (3) It will involve potential users in establishing the degree of need for technical assistance programs in the area of independent living.
- (4) It will recommend a method for centralized storage, retrieval, and dissemination of information in the area of independent living.
- (5) It will test the usefulness of recent R&E projects by making considerable use of findings in the area of independent living.
- (6) It will link R&E findings, resource persons, and users from the area of independent living.
- (7) It will involve potential users in the development of training programs in the area of independent living.
- (8) It will produce a model training program for service agencies which may be useful in other areas in addition to the area of independent living.
- (9) It will serve as a catalyst for the future development of innovative programs in the area of independent living.

In summary, the proposed project holds promise as a capacity-building tool which will link a wide variety of resource persons and potential users in a model effort of research utilization focused on a relatively new and important area in the field of rehabilitation.

3: PROJECT OBJECTIVES

The proposed research utilization project will develop a method for improving the spread and utilization of research and demonstration results in the field of independent living. Persons in this field from around the country will work together to develop a standardized and coherent body of information on independent living as a basis for a model training program directed toward severely handicapped individuals, public and private agency personnel, voluntary and professional organizations, and service facilities.

Project activities will include:

A two-day advisory committee planning workshop in which 15 persons with expertise in independent living will develop an organized body of information on this subject.

A national research utilization conference in which 30 to 40 invited participants will review the work of the planning workshop, evaluate training materials on independent living developed out of the workshop effort, and make plans for dissemination of training program(s) on this subject.

A pilot training seminar on independent living for state vocational rehabilitation agency personnel to test the usefulness of the training program and materials.

Specific objectives of the project are:

Objective 1:

To document a lexicon of terminology relating to the field of independent living and to develop "as necessary" words, phrases, and definitions to accurately describe functions, processes, and outcomes of independent living.

The thrust of this objective is to produce and make available a set of descriptive words and phrases to be used as a common reference point in discussions relating to independent living.

Objective 2:

To develop a standardized analytical method for categorizing independent living programs according to significant dimensions (e.g. services provided, client characteristics, organizational and management structure, program leadership and sponsorship, resources available, principle means of support, etc.).

The purpose of this objective is to create a functional and generally useable set of descriptive categories capable of being accessed from a variety of viewpoints and able to indicate basic differences and similarities between different types of independent living programs.

Objective 3:

To assess the feasibility and develop a proposal for establishing a national independent living data bank and technical assistance program.

The purpose of this objective is to assess a variety of means, and the associated cost and potential benefits, for systematically collecting and disseminating information about the development and operation of independent living programs throughout the country. Additionally, possible methods of utilizing available technical expertise to assist in the development of independent living programs and to maintain the operation of established successful independent living service delivery programs will be examined.

Objective 4:

To develop audio-visual training materials on independent living.

The purpose of this objective is to convey to a variety of audiences general information on independent living issues as well as to illustrate several alternative independent living models and their relative advantages and disadvantages.

Objective 5:

To develop a model training program on independent living intended for severely handicapped individuals, personnel of public and private agencies, voluntary and professional organizations, and service facilities.

This objective is intended to provide for dissemination of information on independent living to handicapped persons who might use such arrangements, to counseling personnel who offer advice and coordinate services for handicapped clients, and to persons who might foster the development of new independent living programs.

4: WORK PLAN - TASK DESCRIPTIONS

A. OBJECTIVES AND TASKS

The following section outlines tasks required to complete the project objectives. Unless otherwise specified, work will be performed by project staff. A summary of project staff roles is included at the end of this section which outlines their responsibilities for various tasks.

OBJECTIVE 1:

To document a lexicon of terminology relating to the field of independent living and to develop "as necessary" words, phrases, and definitions to accurately describe functions, processes, and outcomes of independent living.

Task A: Collect extant materials and reviews relating to independent living as it is presently conceived.

Comment

This task should require less than one man-month of effort to complete as this applicant already has much of this material on file. The results of several current major efforts to review the state of the art of independent living will be immediately available for review by this project as the principal investigators are presently serving as advisors and consultants to these other projects (i.e. "What Has Been Done With Respect to Independent Living" by Ed Roberts, and "The History and Background of the Boston Center for Independent Living" by Fred Fay).

Task B: Cull from the available literature key terms, phrases, and concepts which need to be defined.

Comment

This task will require a concentrated and sensitive search by project personnel, but will require less than one man-month of effort.

Task C: Define the words, phrases, and concepts derived in Task B.

Comment

This task may require as much as two man-months of efforts for cross-referencing available definitions from the literature on independent living with sources from other fields. In some cases it will involve contacting individuals who are active in the independent living movement and securing their assistance in defining terms and concepts, as well as validating presently available definitions.

Task D: Complete a draft of the lexicon and circulate it to the project advisory and planning group for review and comment.

Task E: Revise the draft lexicon according to comments and suggestions made by the reviewers, and publish a final draft of the lexicon for dissemination and use in the National Conference and Model Training Seminar.

OBJECTIVE 2:

To develop a standardized analytical method for categorizing independent living programs according to significant dimensions (e.g. services provided, client characteristics, organizational and management structure, program leadership and sponsorship, resources available, principle means of support, etc.)

Task A: Collect extant materials and reviews relating to independent living as it is presently conceived.

Task B: Cull from the available literature and materials key variables, categories, type descriptions, etc., and begin to lay out alternative patterns for organization.

Comment

Tasks A and B should be done concurrently with the similar tasks described for Objective 1 above.

Task C: Hold a meeting of project advisory and planning group in order to discuss and work out details for analytical categorization of independent living programs.

Comment

This task will occur shortly after the lexicon and other background materials are complete.

Task D: Produce a draft method for categorizing independent living programs and use it to categorize those programs identified in the background and review materials.

Comment

This task will utilize data collected in Task B, Objective 3.

Task E: Introduce the categorical method at a national meeting of persons interested and involved in the operation and development of independent living programs.

Comment

The methodology for analyzing and categorizing independent living programs will be a major part of the training materials to be developed and used initially at this national conference.

Task F: Revise the analytical method and categories according to comments and suggestions received at the national conference, and prepare a final draft for publication, dissemination, and use in the model training seminar.

OBJECTIVE 3:

To assess the feasibility and develop a proposal for establishing a national independent living data bank and technical assistance program.

Task A: Develop a format for systematically obtaining information along prescribed dimensions on the planning, development, and operation of independent living programs around the country.

Task B: Identify independent living programs throughout the country and distribute a proposed format for the acquisition of information from these programs along with a questionnaire addressing issues such as perceived importance of centralized information processing, projected use, suggested alternative format, perceived needs for technical assistance, and suggested methods for providing technical assistance.

Task C: Assess the results of the survey questionnaire described above and present them to the project consultation and advisory committee for further recommendations.

Comment

This task will be closely coordinated with Task C, Objective 2.

Task D: Revise and publish a refined format and procedure for information collection and dissemination, and draft a model proposal for the establishment of a technical assistance program for independent living projects.

Task E: Present the proposed format and program described above to a national conference for discussion and further revision.

Task F: Disseminate consensual recommendations and begin to obtain support for future efforts.

Comment

The implementation of tasks D, E, and F, depend on assessments of the feasibility made by the project consultation and advisory group, and subsequently by participants at the national conference.

OBJECTIVE 4:

To develop audio-visual training materials on independent living.

Task A: Develop a general videotape and accompanying written outline on independent living based on the issues and dimensions defined in an advisory committee planning workshop.

Comment

These materials will be produced by the Audio-Visual and Composition and Design Departments of the Texas Institute of Rehabilitation and Research with consultation from workshop participants and from selected Texas Rehabilitation Commission staff.

Task B: Circulate completed tape and outline to workshop consultants and incorporate their suggested revisions.

Task C: Contract with six differing independent living programs to produce videotapes on their specific projects using the standardized comparative format developed in Task A.

Comment

Projects will be selected to represent a variety of independent living models including clustered and dispersed residences, differing supportive service models, and differing circumstances in which the program was established. It is expected that the independent living programs asked to produce videotapes will be represented on the Advisory Committee.

Task D: Develop printed materials that integrate the videotape on general issues and the six project videotapes into a cohesive presentation dealing with independent living for handicapped individuals.

Task E: Develop additional videotape(s) and written materials as needed to relate general information on independent living to specific audiences.

Comment

Audiences for whom specific materials might be developed include handicapped individuals with different types of impairments who wish to select an independent living situation for their own use, counselors who make decisions about client referrals, and agency personnel who are seeking information on how to establish an independent living program.

Task F: Present combined training materials at national research and utilization conference for comment and revision.

Comment

This national research and utilization conference will have approximately 30 invited participants including severely handicapped individuals, research and utilization specialists at the national, regional, and state levels, and representatives of state agencies, voluntary and professional organizations, and service facilities.

Task G: Test and evaluate training materials at pilot training seminars (See Objective 5, Task D), and incorporate needed revisions.

OBJECTIVE 5:

To develop a model training program on independent living intended for severely handicapped individuals, public and private agencies, voluntary and professional organizations, and service facilities.

Task A: Develop alternative training methods for a model training program on independent living using materials developed in Objective 4.

Task B: Present a sample training program using alternative methods to participants in a national research and utilization conference for their evaluation (See Objective 4, Task F).

Task C: Use evaluation feedback from research and utilization conference to refine a training program on independent living.

Task D: Conduct a pilot training seminar for selected vocational rehabilitation agency personnel.

Comment

This pilot seminar will be coordinated jointly with personnel of the Texas Rehabilitation Commission including the Regional Training Office, Program Specialist for the Severely Disabled, Research Utilization Specialist, and Director of Extended Rehabilitation, all of whom have worked previously with project staff in the area of independent living. (A program from an earlier training seminar conducted jointly with the Texas Rehabilitation Commission is included in Appendix B.)

Task E: Evaluate the effectiveness of the pilot seminar and incorporate needed revisions.

Task F: Disseminate information on the independent living training program and foster its use by various agencies and organizations.

Comment

Participants in the Advisory Committee Planning Workshop and the National Research and Utilization Conference will be major agents in the dissemination effort. Plans for dissemination are discussed at length in Section 6 on Utilization.

SUMMARY OF RESPONSIBILITIES OF THE PROJECT STAFF

Principal Investigators

jointly responsible for overall planning and direction of project, recruitment of consultants, initiation of cooperative relationships with agencies and organizations

Project Coordinator

responsible for planning workshops and research utilization conference, maintaining liason with consultants and cooperating agencies and organizations, preparation of written and audio-visual materials

Research Assistant

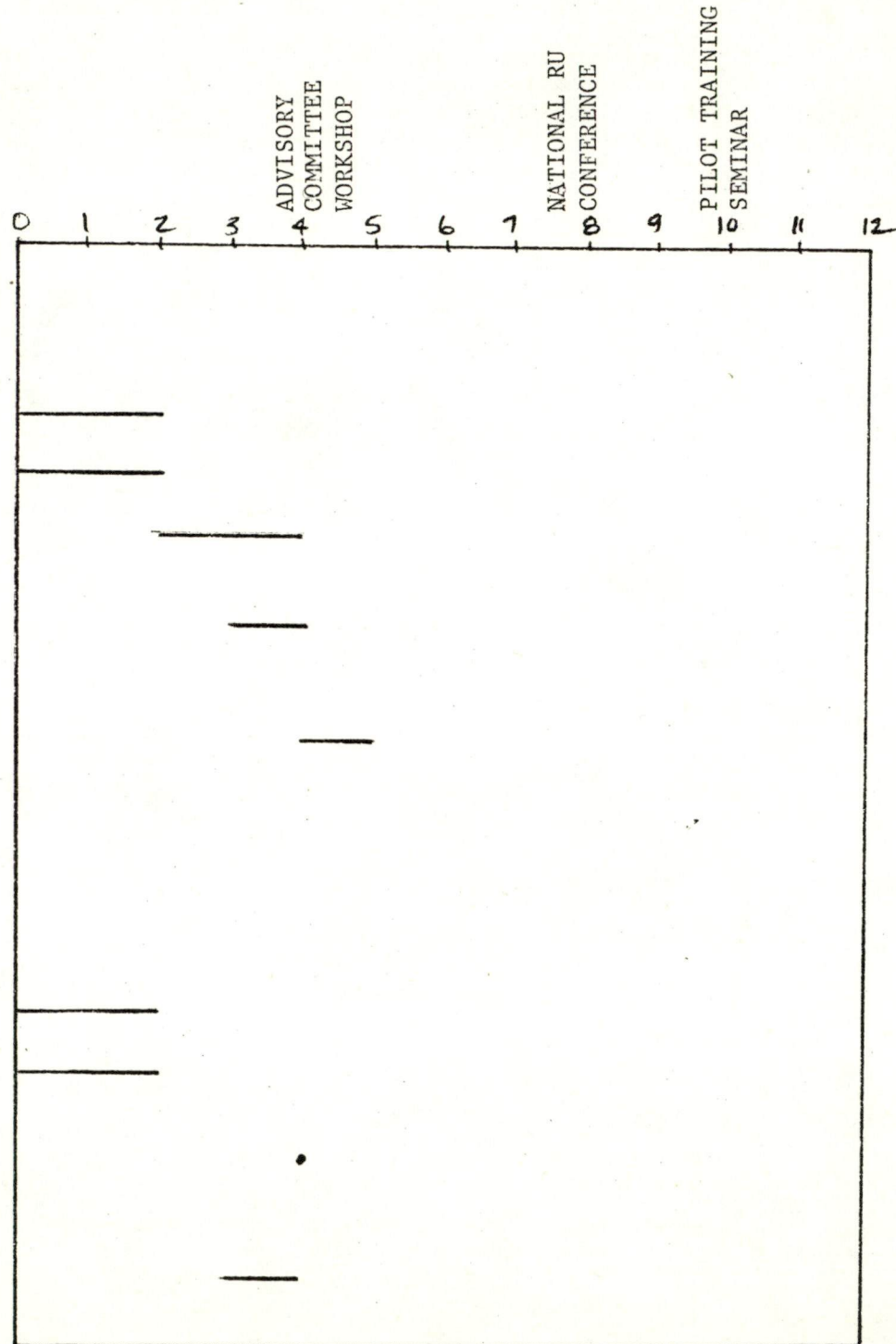
responsible for accumulating and abstracting materials on independent living, providing general assistance to project coordinator

Secretary

responsible for routine secretarial duties as well as assistance in preparing training materials

B. GANTT CHART

- OBJECTIVE 1: development of a lexicon relating to independent living
- A review of the literature
 - B cull key terms and concepts
 - C define terms and concepts
 - D complete and circulate draft to advisory committee for review
 - E develop final draft for use in national conference and training seminar
- OBJECTIVE 2: development of analytical categories and methodology related to independent living
- A review of literature
 - B cull key terms and concepts
 - C hold meeting of project advisory committee to discuss categorization
 - D produce a draft method to categorize independent living programs (pilot test)



OBJECTIVE 3:

E introduce method at national conference

F revise and incorporate conference feedback

G publish final draft for use in model training seminar and later training efforts

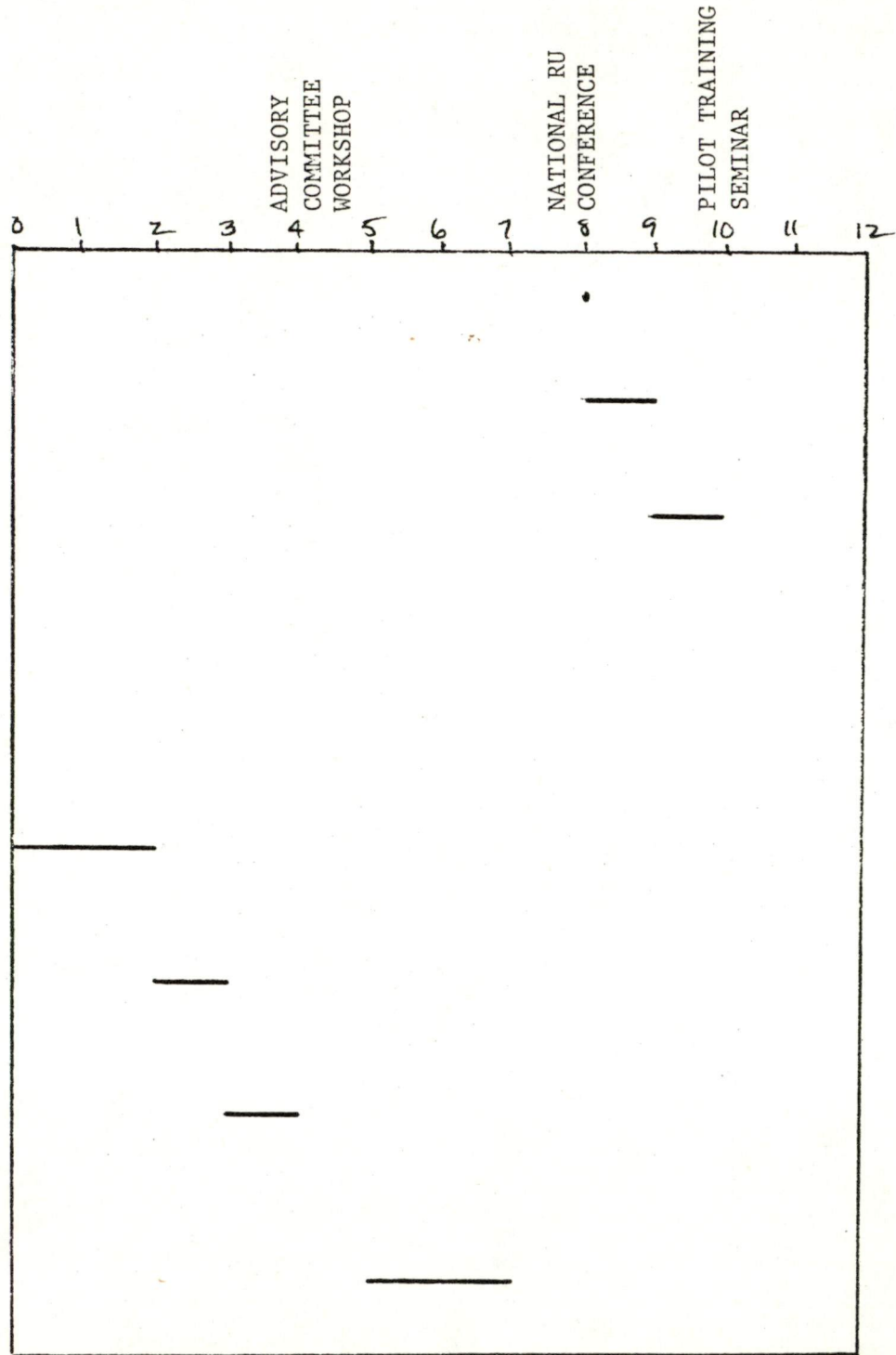
feasibility assessment and proposal for information bank and technical assistance program

A develop format for systematically collecting information on independent living programs

B identify independent living programs and distribute survey questionnaire

C assess results of questionnaire and present to advisory committee for further recommendations

D publish refined format and procedure for information collection and dissemination; draft proposal for establishment of technical assistance program



ADVISORY
COMMITTEE
WORKSHOP

NATIONAL RU
CONFERENCE

PILOT TRAINING
SEMINAR

0 1 2 3 4 5 6 7 8 9 10 11 12

E present format and program to national conference for discussion and further revision

F distribute consensual recommendations and seek support for future efforts to establish information bank and technical assistance program

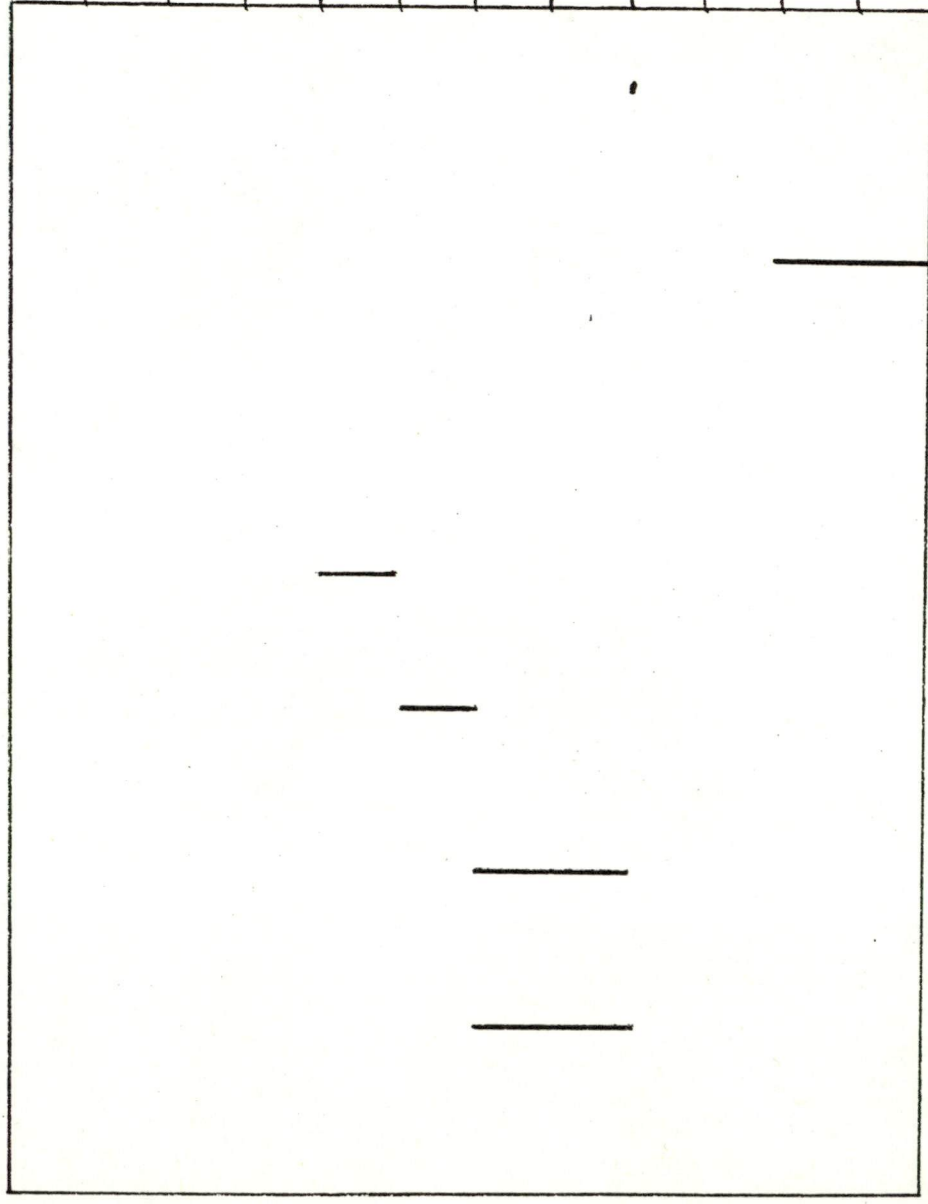
OBJECTIVE 4: development of audio-visual materials on independent living

A develop introductory videotape and written outline on workshop issues

B circulate to workshop consultants and incorporate suggested revisions

C contract with six selected independent living programs to produce videotapes on their projects using standardized format

D develop printed materials to integrate videotapes into a cohesive presentation



ADVISORY
COMMITTEE
WORKSHOP

NATIONAL RU
CONFERENCE

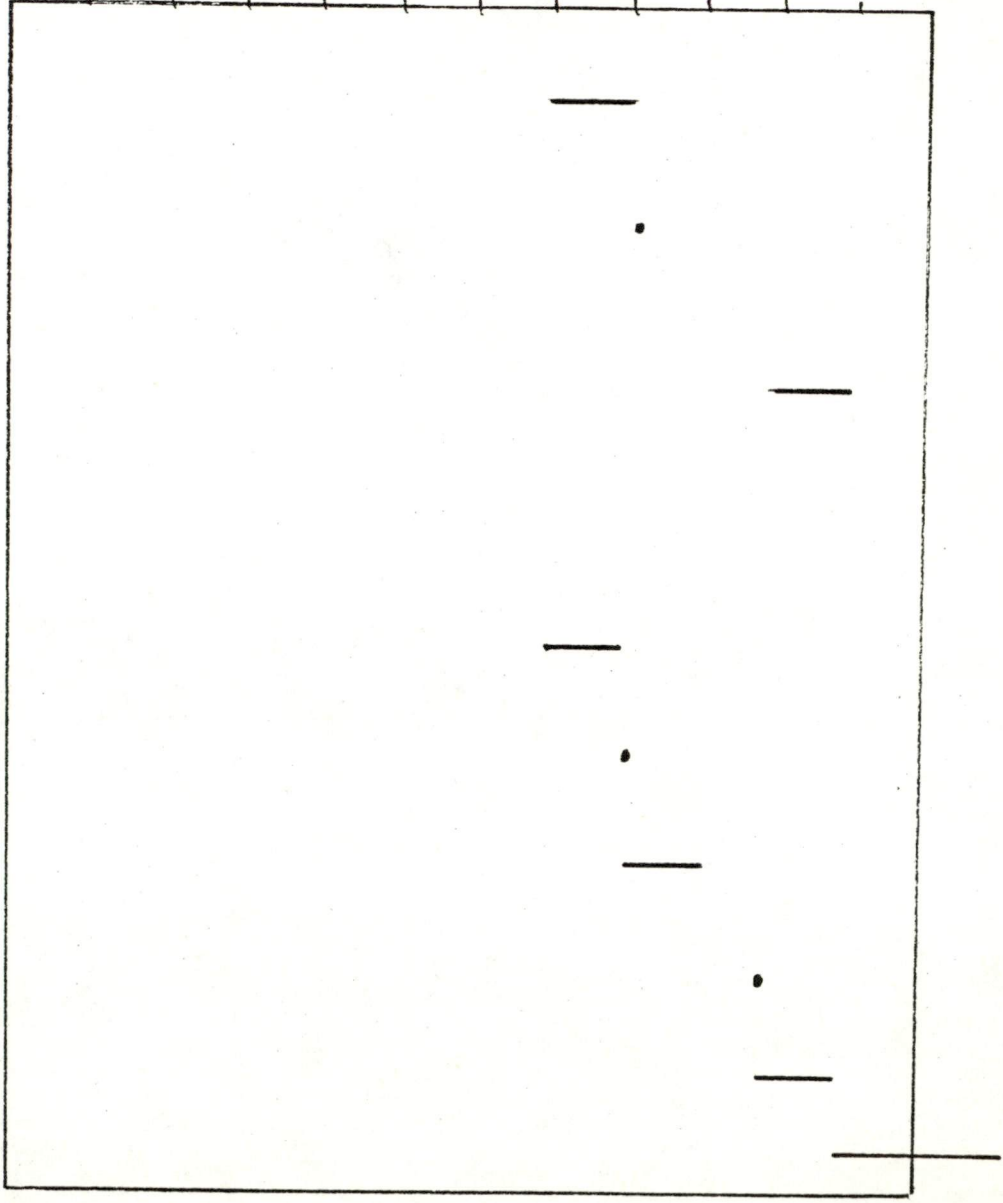
PILOT TRAINING
SEMINAR

0 1 2 3 4 5 6 7 8 9 10 11 12

- E develop additional video-tapes to relate information to specific audiences
- F present combined training materials at national RU conference for comment and revision
- G test training materials at pilot training seminar and incorporate needed revisions

OBJECTIVE 5: development of a model training program on independent living

- A develop appropriate methods for model training program using materials from objective 4
- B present sample training program at national RU conference
- C use evaluation feedback to refine program
- D conduct pilot training seminar for selected vocational rehabilitation agency personnel
- E evaluate effectiveness of seminar
- F disseminate information on program and foster its use



5: METHODOLOGY

B. Developmental Methodolgy

1. Special Techniques and Resources

This project is intended to provide a structure for cooperation among a variety of experts on independent living programs, on research utilization, and on agency operations to improve the availability of independent living options to severely handicapped individuals. These persons will be involved in the development of a coordinated body of information on independent living and in the development of training efforts in this field through a planning workshop, a national research utilization conference on independent living, and a pilot training seminar.

These activities are designed to involve a workable number of participants so that each person can play an active role, in contrast to extremely large conferences where the majority of persons are passive observers. In each case, materials will be circulated prior to meetings so that participants can be prepared for substantive working sessions.

Information and training materials developed in the project will be produced in part by the Audio-Visual Department of the host institution. The development of some materials (six videotapes) will be contracted with various independent living programs in order to illustrate a variety of options and approaches.

2. Design, Test, Redesign Cycle

There are numerous steps in the course of this project in which persons representing a variety of backgrounds are involved in developing, evaluating, and refining materials. Major vehicles for this process are a planning workshop, national research utilization conference, and pilot training seminar. The project staff will be involved in on-going development activities so that structured group meetings can be used to best advantage. The specific materials to be designed, evaluated, and reworked at each stage of the process are outlined below.

GENERAL PROJECT OUTLINE

<u>MONTH</u>	<u>STAFF TASKS</u>	<u>WORKSHOPS & CONFERENCES</u>
1		
2		
3	Reviews of literature; development of preliminary analytical frameworks; circulation of preliminary workshop materials	
4		ADVISORY COMMITTEE PLANNING WORKSHOP (15 participants with expertise in independent living)
5		
6	Development of audio- visual and written training materials including six contracted videotapes for pilot presentation at research utilization conference	
7		
8		NATIONAL RESEARCH UTILIZATION CONFERENCE ON INDEPENDENT LIVING (30-40 participants)
9	Refinement of training materials; planning for dissemination	
10		PILOT TRAINING SEMINAR
11	Evaluation of seminar methods; dissemination of training programs; preparation of final report on project	
12		

A. Expected Useable Research and Demonstration Product:

This project is expected to produce a number of products including:

Numerous issue statements, a lexicon and standardized analytical reporting format on independent living programs.

A detailed recommendation for the establishment of a workable information bank and technical assistance program on independent living.

A general videotape and accompanying written materials that summarize concisely the major issues and dimensions in independent living programs.

Six videotapes on a variety of specific independent living projects produced according to a standardized comparative format.

Additional videotapes designed to present independent living information to selected audiences.

A model training program for public and private agency personnel, voluntary and consumer organizations, and service providers that uses the audio-visual materials cited above as well as other methods such as group discussions or field trips.

B. Market

It is expected that these products will be useful to agency personnel, facility staff, voluntary organizations serving handicapped individuals, consumers and consumer organizations, and governmental policy makers. By making a coherent and consolidated body of information on independent living models available to these persons, the project will hopefully increase awareness of the feasibility of independent living, improve the referral and access of handicapped persons to such programs, and foster the development of more independent living programs. An estimate of the size of these target populations can be found in Section 7 on Cost Benefit Measures.

C. Dissemination Plan

Written materials, videotapes and a written report on a model training program will be used to share information developed in the project.

Initially these materials will be disseminated and used in a state agency training format in cooperation with the Texas Rehabilitation Commission where a number of joint efforts are already underway. (Two key staff members recently developed a two-day workshop for

the Texas Rehabilitation Commission counselors in cooperation with agency training personnel, see Appendix B).

This pilot experience can then be expanded within other agencies and organizations in this region and elsewhere. It is expected that participants in the National Research Utilization Conference will be major agents in fostering the adoption of the training program in many parts of the country. These participants will represent a wide geographical base and variety of positions in the entire rehabilitation system and in the community of handicapped citizens.

D. Utilization Plan

- (1) Independent living opportunities are a widely recognized need throughout the country, so no major resistance to the use of training programs resulting from this project is expected.
- (2) The training program developed in the project is specifically intended to portray a wide range of independent living options that have been used in a variety of settings with differing resources or this reason limited applicability in a single set of unique circumstances should not be a problem.
- (3) The training program developed in this project will be designed to be useful in a state agency training format so that it should be readily usable in usual training settings. Written materials will be provided to coach person(s) responsible for conducting the training. Materials will be usable with a minimum of space and simple equipment including a videotape machine or slide projector and a tape recorder. The project will support the costs of materials development so that audio-visual and written materials can be sold to potential users at minimal duplication cost.
- (4) It is expected that the training program will result in the referral of many more handicapped individuals to appropriate independent living options. The usefulness of the program in fostering the development of new independent living programs is less certain, but experience indicates that there are now a great number of agencies, facilities, voluntary organizations and consumer organizations seeking information on how to establish independent living programs.
- (5) The project will track the use of training materials ordered following the completion of the first program year. This will not be an elaborate data collection effort.

E. Implementation Plan

The program will initially be implemented within the training system of the Texas Rehabilitation Commission. The project staff will be actively involved in expanding its use in the region. Participants in the national research utilization conference will be major agents in the expanded use of the training program in other parts of the country. Project staff will also be prepared to visit distant agencies who may request consultation in establishing independent living training programs.

F. Commitments to Implement Results of Project

Mr. Jess Irwin, Commissioner of the Texas Rehabilitation Commission, has expressed firm support of his agency in working cooperatively on this project. Other commitments have not been formalized, but a number of agencies and individuals have expressed serious interest to program staff in working on such a project.

G. Indexed Abstract of Proposal

The proposed research utilization project will develop a method for improving the spread and utilization of R&D results in the field of independent living. Persons in this field from around the country will work together to develop a standardized and coherent body of information on independent living as a basis for a model training program directed toward severely handicapped individuals, public and private agency personnel, voluntary and professional organizations, and service facilities. Project activities will include (a) a two-day advisory committee planning workshop in which 15 persons with expertise in independent living programs will develop an organized body of information on this subject; (b) a national research utilization conference in which 30 to 40 invited participants will review the work of the planning workshop, evaluate training materials on independent living developed out of the workshop effort, and make plans for dissemination of training program(s) on this subject; and (c) a pilot training seminar on independent living for state vocational rehabilitation agency personnel to test the usefulness of the training program(s) and materials.

7. COST-BENEFIT MEASURES

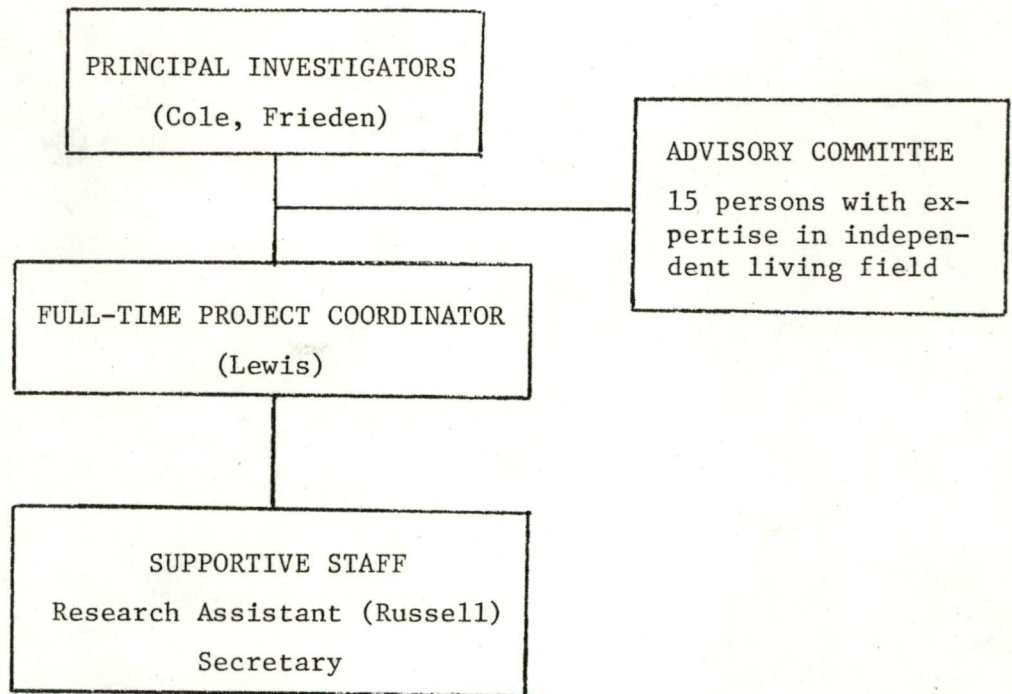
The Urban Institute estimates that there are over ten million individuals in the United States who are "most severely disabled". This number is expected to grow to more than 13 million by 1984. Of those who are now considered most severely disabled, almost two million reside in institutions of one sort or another. Most of the rest live with family members and depend on them to provide essential care.¹ It is difficult to estimate the proportion of these individuals who could benefit from services provided by independent living programs. However, it is conceivable that the majority of individuals with most severe disabilities in the United States today are in need of services typically provided by independent living programs. It is possible that the proposed project could ultimately benefit up to ten million severely disabled individuals who are presently in need of independent living support services.

The most direct benefits of this project would be to participants involved in the national conference and subsequently to persons who, or programs which, make use of training materials developed by the project. State vocational rehabilitation programs and local housing and community service programs may benefit immediately from training materials and could model training programs of their own after this project. Further secondary benefits may accrue to dozens or possibly hundreds of independent living programs which make use of information and technical assistance programs initiated by this project.

It is hoped that this project will eventually be part of a movement to free severely disabled individuals from their dependence on others for support and for assistance in activities of daily living; to allow severely handicapped individuals to live their lives in greater independence and with greater dignity; and to provide severely disabled individuals the back-up support required to make them productive in both a vocational and an avocational sense. Furthermore, the potential benefit of this independent living movement would extend to the families of disabled persons and to society as a whole. For those who return to work, lost wages would be restored, industry would regain labor skills, and there would be new purchasing power and tax revenues for the economy. For those who were freed from constant attendance or dependency, institutional disability income and welfare costs would often be decreased.²

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- 1 Report of the Comprehensive Service Needs Study, The Urban Institute, Washington, D.C., 1975.
 - 2 Fay, F. Problems of the Severely and Multiply Handicapped, Awareness Papers, White House Conference on Handicapped Individuals, Washington, D.C., 1977.

8. BACKGROUND

A. Staff Organizational ChartB. Staff Qualifications

See Appendix D for Curriculum Vitae of project staff.

C. Other Qualifications of Staff

In addition to the qualifications of the principal investigators and other key staff persons cited above, the potential for success of this project will be enhanced by the experience of the host agency, the Texas Institute for Rehabilitation and Research, in developing innovative independent living programs including the

Cooperative Living Residential Program, Independent Lifestyles, Quality Living, and Free Lives projects. (See Appendix C for summary information on these independent living clusters in Houston.) The project will further be enhanced by the cooperation and collaboration of the state vocational rehabilitation agency, the Texas Rehabilitation Commission, which has played a leadership role throughout the states in developing independent living programs through its extended rehabilitation services project. Additionally, the project will be enhanced by cooperation and collaboration with the state social and welfare services agency, the Texas Department of Public Welfare, which is in the midst of an SRS sponsored, statewide demonstration program to develop independent living opportunities for Medicaid eligible clients with severe disabilities.

Project plans call for the identification and appointment of a key group of consultant-advisers who have particular experience and expertise relating to independent living programs. This group may include such persons as the Director of the Office of Independent Living in the Department of Housing and Urban Development, various directors of state vocational rehabilitation agencies or program directors from those agencies, consumer representatives of client groups served by operational independent living programs, research utilization specialists from RSA central and regional offices, special centers personnel responsible for the development of independent living programs, RSA personnel responsible for initiating and developing independent living programs, and founders and leaders from such programs throughout the country. It is anticipated that this group will lend significant credibility to the project, and that their advice and consultation will result in the production of high quality training materials and the culmination of a highly successful conference.

The principal investigators have, within the past six months, developed and implemented a training program on new options for severely physically disabled individuals for state vocational rehabilitation personnel. A description and evaluation report of this training program is included as Appendix B. This recent experience should be of great benefit to the project staff in completing the proposed project.

D. State Merit System Classification

Not applicable.

E. Related Efforts of Project Staff

(1) The principal investigators and support staff for the proposed project are presently involved in the development and evaluation of the New Options transitional living program, an independent living skills training program (RSA R&D 13P57889/6-01, see Appendix A). The proposed project would be compatible with and supplementary to the New Options transitional living program. It would provide significant additional input into the development of that program as well as functioning as a showcase for that project in terms of dissemination. Key staff persons to be hired after the notification of grant award include the project coordinator and a research assistant. These individuals should be available at the time of grant award.

(2) Independent living as a programmatic concept in rehabilitation has a comparatively recent history of development. This will be discussed in the following section of this proposal. The principal investigators of this project have been intimately involved in planning and implementing independent living programs since 1972. Jean Cole was responsible for evaluating the previous Cooperative Living program sponsored by TIRR and RSA, and she is presently director of the New Options transitional living project. Lex Frieden, a quadriplegic, lived in the Cooperative Living residential project for two years and during that time helped manage the project. He participated in the first independent living conference in Berkeley, California in 1975, and is presently a consultant to the Institute for Research Utilization which is preparing a state-of-the-art review on independent living.

The New Options project and the Cooperative Living project, in which the principal investigators have been and are presently involved, have been modeled by several other independent living programs around the country. Additionally, key staff persons from the proposed projects have had the opportunity to visit many other independent living programs during the past several years.

Experience of the applicants in the independent living field has clearly pointed out a need to develop common reference points and terminology for purposes of communication in the field. Also, in this area of rapid development, it is important to constantly update and stay current with developments in order to avoid mistakes and maximize the benefit of transferable experiences. Finally, it appears to be of utmost importance in this early developmental stage of independent living programming to provide personnel who may ultimately be involved in the success or failure of many of these developing programs with the background knowledge required to understand these programs and to work with them.

F. Endorsements

Endorsements and letters of support for this project will be sent directly to the Director of Research, RSA, DHEW. Reference to the involvement of key parties such as the Texas Rehabilitation Commission, Texas Department of Public Welfare, American Coalition of Citizens with Disabilities, Rehabilitation and Training Centers Association and others is made in Section C above.

G. Implications for Legislation

There are a number of policy questions that will be considered by Congress as programs for independent living are debated. These policy questions include the following: Who is the target population? What services are essential for independent living? What is the role of a private sector? What changes in current service programs are necessary for independent living? What has been the legislative history of independent living programs? What are the projective costs of independent living programs? What are the promising program proposals for future development in independent living? These questions and others like them are presently under advisement by a variety of sources. The proposed project will no doubt result in substantive and hopefully sound recommendations relating to each of the issues listed above as well as others which are expected to become apparent during the course of the project. By involving participants who have a variety of points of view, significant concensual policy and program recommendations should result from this project.

9. REVIEW OF APPROPRIATE LITERATURE

As is the case in many rapidly developing fields, published reports and documentation of independent living programs become available from one to two years after the fact. For this reason it is difficult to obtain up-to-date information.

However, it is possible to document the history and conceptual bases of the independent living movement as it is presently understood. As a matter of fact, several exceptionally useful efforts have either been recently completed or are presently underway. Principal among these are Gini Laurie's book on Housing and Home Services for the Disabled (1977) and a state-of-the-art review of independent living programs by Ed Roberts et.al. under contract from the Institute for Research Utilization in Washington, D.C. (in press). In her book, which is subtitled "Guidelines and Experiences in Independent Living", Laurie describes a number of independent living arrangements across the United States and throughout the world. In his paper, Roberts will focus his discussion on recent major legislative and programmatic advances in independent living in the United States.

In addition to these, the Center for Independent Living has recently published a series of papers prepared for their 1975 conference on Independent Living (1976), the White House Conference on Handicapped Individuals recently published a report of their Long Term Care Seminar (1977), the Texas Institute for Rehabilitation and Research and Tufts Rehabilitation Institute will soon publish extensive reports on independent living projects sponsored by their respective Research and Training Centers, and several reports on Comprehensive Needs Demonstration projects are now or will soon be available. Most of these papers focus on a programmatic response to the multiplicity of service needs which must be met in order for persons with severe disabilities to be able to live as independently as possible.

The traditional use of the term independent living in rehabilitation implied medical stability and independence in a very strict and limited sense. Today, independent living refers to the ability of a severely disabled person to actively participate in society - to work, own a home, raise a family, and generally to share in the joys and responsibilities of community life (Pfleuger, 1977).

Unique independent living programs designed to deliver a variety of services needed by severely disabled persons who want to be comparatively independent and who desire to have more control over their own destinies have recently been established in several places across the country. Foremost among these are programs in Berkeley, California, Boston, Massachusetts, Worcester, Massachusetts, Houston, Texas, and Ann Arbor, Michigan (see for example CIL, 1976; Stock and Cole, 1975; and Laurie, 1977). Major efforts in this field have also been made in Sweden, France, and the Netherlands (see for example Lenard, 1975; Brattgard, 1971; Het Dorp, 1972; and National Swedish Institute, 1972). These independent living programs provide such services as health maintenance, attendant care, transportation, education, employment, peer counseling, independent living skills training, architectural modification, equipment repair, and so forth. It should be noted that although housing is an integral component of many of these programs, the focus of independent living is on the provision of a wide variety of supportive services.

It is apparent from this brief review that very little is widely known about certain key issues related to the development of independent living. For example, no extant literature or data address the question of liability in these programs. Is a small non-profit entity which provides independent living services such as attendant care or transportation obligated to subscribe to costly liability insurance programs? And if so, can a severely disabled individual afford to share his or her portion of that cost and still live independently? The proposed project will develop training materials which would allow persons with expertise in areas outside the field of rehabilitation or independent living (such as liability insurance carriers) to understand the nature of these programs well enough to make sound decisions regarding them.

In summary, two major deficits appear in the literature on this subject. Because the field has no substantial history, there is little literature available. What does exist is largely descriptive. Secondly, due to the fact that descriptive terminology is very often vague and ambiguous, there is little agreement on the meaning of basic concepts and issues.

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APPENDICES

APPENDIX A

RT-4 Report Summarizing Work of Principal Investigators on Community Integration of Severely Physically Handicapped Individuals

APPENDIX B

Program from Two-Day Seminar on New Options Transitional Living Project Conducted by Principal Investigators and Other Staff for State Vocational Rehabilitation Agency Counselors

APPENDIX C

Summary Information on Four Independent Living Clusters in Houston, Texas

APPENDIX D

Curriculum Vitae of Project Staff

APPENDIX A

Transitional Living: A Program Fostering Community
Integration of Severely Physically Handicapped Persons

JUNE 1977

Report on RSA Project Grant # 13P57889/6-01
(interim)

Supported in part by RT4, RSA, DHEW

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STATEMENT OF THE PROBLEM:

Recent developments in rehabilitation have placed an increased emphasis on creating opportunities for special housing, education, and employment for severely physically handicapped persons. The Rehabilitation Act of 1973 recognizes the special and unique needs of the severely disabled. The provision of opportunities offered by the Act has permitted some individuals who were formerly isolated in institutions such as nursing homes or in dependent home situations to begin lives of independence and productivity. These efforts, though important, have been slow to evolve, they lack comprehensiveness, and too few persons have been offered maximum options and opportunities. There are countless other individuals who find it overwhelmingly difficult to assume the responsibilities that these new opportunities afford. Many of these persons have the basic untapped capabilities necessary to become independent and develop a lifestyle of personal satisfaction and productivity. However, due to a fragmented approach of limited scope and the absence of a model of transition, many severely physically handicapped persons cannot bridge the gap between a protected institutional existence or an isolated and confining home situation to the management and assumption of an independent lifestyle.

Present national programming offers few prototypes that prepare the severely physically handicapped individual to move from a dependent setting into an independent setting. Structured programs which place an emphasis on offering maximum opportunities at cost-effective levels are essentially non-existent. Emphasis is not placed on allowing the severely physically handicapped person to assume the multiple stresses of independent living and employment in a gradual manner.

In June of 1976 TIRR began a model transitional living program called New Options which is designed to foster the integration of severely physically handicapped individuals into their communities. Goals of integration may include the establishment of independent living, involvement in educational and vocational opportunities, active social participation in the mainstream of society, the enhancement of personal skills important in daily problem solving, and the stabilization of goals and objectives required to maintain a satisfying quality of life. The planning and initial months of operation of New Options were supported in part by RT-4 funds which continue to support a portion of the research to evaluate program effectiveness. In October of 1976 an R&D grant (13-P-57889/6-01) was funded by RSA. This has substantially increased the project capability to conduct service demonstrations and evaluation research.

Three years of experience in a previous R&D residential project (SRS R&D 13-P-55487/6-01) (RT-4. Projects R-157 and R-158) have provided valuable background information to project personnel on the process of reintegration of severely physically handicapped persons into the community. Forty

severely disabled young adults have lived in the Cooperative Living Project since it opened in January of 1972. This project provided a first opportunity to begin involvement in education, vocational training, or employment. Almost all of the Cooperative Living residents made important gains in independence during their stay in the project. The program removed many constraints that existed in residents' former living environments, but contained no elements of structured transitional programming. Gains in independence thus occurred largely as a result of residents' own individual efforts over a relatively long period of time. (As of September, 1975, mean length of stay in the project was 15 months.)

The New Options transitional project has utilized the valuable background experience of the Cooperative Living Project, explicitly incorporating into a planned and structured transitional program many of the features fostering independence that operated implicitly in the earlier program. This structured transition offers a number of advantages: (a) the acquisitions of important skills can be made in much less time, (b) the new program serves a number of persons with marginal potential for independence who would have been unable to benefit from the earlier program that demanded greater personal resources, (c) the new program provides more information and experience than residents of Cooperative Living gained in spite of their longer stay in the project because of important added project resources, (d) the project permits the development and careful comparative evaluation of alternative transitional learning experiences. In essence, detailed studies can be made of controlled and directed transitional processes that in the Cooperative Living Project were left largely to chance.

The New Options project is housed in TIRR's Maximum Independence Center, a dormitory-style building located four miles from the main Institute building in the Texas Medical Center. Each project participant has a private room. Meals, transportation, and non-professional attendant assistance are provided on a shared basis. The project staff includes a project director (anthropologist), research director (psychologist), functional skills adviser (physical therapist), social worker, part-time vocational counselor, driver, attendant manager, and attendant staff. A number of active handicapped persons from the community who lead many program activities are called staff associates. The structure and content of the program are discussed at length under Current Year's Activity, Progress, and Findings to Date.

Two primary types of research are conducted in the transitional living project. The first examines the development and evolution of the project from a holistic anthropological perspective. It is intended to provide a description of internal processes of development, to trace the changing relationships of the project to its host rehabilitation hospital and to the state vocational rehabilitation agency, and to provide background information on the program as a context for viewing outcome data. A major goal of this portion of the study is to provide a structured overview of the transitional living program to facilitate replication. The second type of research employs a longitudinal multimeasure design with control groups to evaluate the

effects of the program on participants' behavior, attitudes, and information base. The hypothesis being tested in this portion of the study is that the TIRR transitional living program presents certain information, skills, and experiences which facilitate the behavioral adaptation and personal adjustment of individuals to severe physical disabilities. These two portions of the study are discussed separately below.

Sub-study I: An Anthropological Study of Program Development

OBJECTIVE (S):

1. To trace internal processes of development in the transitional living program, focusing on changes in goals, methods of planning, program content, and in other areas.
2. To analyze the project as a social system, examining roles, interpersonal relationships, and patterns of interaction among staff members and participants.
3. To examine external relationships between the transitional living project and other organizations with particular emphasis on relationships with the host rehabilitation hospital and the state vocational rehabilitation agency.

METHODOLOGY:

Respondents in this portion of the study include project participants, members of the attendant staff, professional staff members, and personnel of other organizations who interact regularly with the project. Participants in the transitional living program include severely physically handicapped persons completing rehabilitation programs at the Texas Institute for Rehabilitation and Research as well as handicapped individuals living in nursing homes or family homes where integration into the mainstream of society has been hindered. All participants must be medically stable and must meet the criteria defining persons as individuals with most severe handicaps (IMSH). The Institute and the Texas Rehabilitation Commission are important sources of referrals. Initially the participants have been single persons with spinal cord injuries who are between the ages of 18 and 50, though the population will be systematically diversified as the project progresses. The live-in project provides a program of transitional training and experience for 8 persons at a time with the program lasting 6 weeks for each participant. It is expected that a total of approximately 150 persons will participate in the transitional program during three years of operation.

Previous research that provides an overview of an entire therapeutic environment can be found in the literature on the concept of the therapeutic community (see for example Caudill, 1958; Cumming & Cumming, 1962; Rapoport, 1960). Literature on the development of community-based programs in the area of emotional or psychiatric disability is relevant to this study also

(Fairweather et al., 1969; Rausch & Rausch, 1968; Moos, 1974). Some methods of data collection have been borrowed from these studies.

The major method of data collection is participant observation made by the project director from an anthropological perspective and recorded in the form of field notes (Pelto, 1970). These observations are directed toward the objectives listed above as well as toward other areas that emerge as significant during the evolution of the project. They focus on informal day-to-day interaction, on planned program activities, on organizational activities such as staff meetings, and on interaction between personnel of the project and outside organizations.

Observational data are supplemented by other types of information. A comprehensive record of project activities is maintained using detailed weekly calendars and logs kept by the attendants and driver. Some participants are asked to keep diaries during their stay to record their activities and their feelings and responses to experiences.

Interviews are conducted periodically with participants, staff members, and persons from outside organizations who interact with the project to explore their feelings about various aspects of the program. At the end of each six-week cycle, participants are asked to complete a questionnaire evaluating the training modules, staff, and other aspects of the program. In the future, additional information on personal perceptions of the transitional program will be gathered. Professional staff members will record brief summary assessments of their daily activities in staff diaries on a time sample basis. Once during each six-to-eight week program cycle, staff members and participants will record their views of the program environment using a measure developed by Moos (1974) in studying community-based programs for persons with psychiatric disabilities (Community Oriented Program Evaluation Scale). If time and resources permit, a projective format similar to the Thematic Apperception Test using pictures of typical project situations may also be employed to elicit views of the project (Caudill, 1958).

Descriptive reports produced in this anthropological study are intended to convey a general view of the evolution of the transitional project over time and to analyze processes of development. This portion of the project research documents the nature of the program itself and thus serves as a measure of the independent variable (program) in the portion of the research dealing with program effects and outcomes.

Sub-study II: A Study of Program Effects and Outcomes

OBJECTIVE (S):

1. To determine the behavioral effects of the transitional program.
2. To determine the informational effects of the transitional program.
3. To determine the attitudinal effects of the transitional program.

4. To determine what specific effects the program will have on certain types of individuals and to develop a means of predicting relative outcomes.

METHODOLOGY:

Design: A longitudinal multimeasure design with control groups is being employed in this study. A series of indicated measures is systematically being made before, during, and after the subject participates in the program to determine the effect of the independent variable (program) on the subjects' behavior, attitudes, and information base.

Subjects: Each participant in the New Options transitional living program is coincidentally a subject in this study. Other severely disabled individuals may also be asked to participate as control subjects in this study. (See description of participant population in preceding section.)

Control Groups: Since subjects are rotated through the program on a continuous basis, those individuals who are just coming into the program serve as a control group for those who are leaving (see Campbell & Stanley, 1963, Institutional Cycle Design). In order to insure comparable control groups, the program is kept as stable as possible with planned changes occurring only on even cycles. In the future, subjects from the complete pool of applicants will be matched and paired on the basis of intake and referral data. Individuals from each pair will then be randomly assigned to consecutive treatment or program cycles. Additionally, depending upon available resources, it may be possible to obtain control data from matched individuals who for various reasons never enter the program.

MEASURES:

1. **Independent Variables:** The primary independent variable (program) is being constantly monitored and documented with staff and subject diaries and checklists. The anthropological study of program development is a major source of this information. Subject variables related to objective 4 are discovered by intake documents (medical and personal histories) and referral forms.

2. **Dependent Variables:** The dependent variable related to objective 1 (behavioral effects) is being measured regularly by several instruments. These instruments include wheelchair odometers and rest time monitors (Halstead, Cooperative Rehabilitation Engineering Center, TIRR, BCM, and TAMU), and functional activity and performance scales (Tufts Long Range Evaluation Summary, RT-7). Additional instruments which are presently under development to measure behavioral effects of the program include behavioral logs (Willems, RT-4, Project R-136), a goal oriented behavioral check list, and a survey of critical incidents.

The dependent variable related to objective 2 (information effects) will be measured by a series of quizzes. These quizzes are presently being designed and relate to the informational content of specific training modules and seminars. These quizzes are under construction at the present

time and should be used throughout the forthcoming project reporting period.

The dependent variable related to objective 3 (attitudinal effects) is being measured by a questionnaire developed by the project staff. Other standardized instruments such as the Siller Semantic Differential, Yaker Attitudes Toward Disabled Persons Test, Tennessee Self Concept Scale, etc., will be introduced periodically in order to validate and supplement the data obtained with this instrument.

The dependent variable related to objective 4 (outcome) is being measured by some of the instruments described above as well as others. Follow-up questionnaires are routinely mailed to subjects approximately four months after they participate in the program. These questionnaires include module ratings, program ratings, application information, follow-up questions, a goal completion survey, and the functional activity and performance scale mentioned above. Follow-up questionnaires are also sent to those counselors who refer clients to the program. Plans are being made for a staff person to do follow-up in the field, thus providing an opportunity to do follow-up interviews and direct observations.

PATIENT/CLIENT CHARACTERISTICS:

Age

1-16 years: 0
16-64 years: 39
65 and over: 0

Sex

Male: 34
Female: 5

Income Status

Public Assistance: 39
Self-support: 0
Modified self-support: 0

SRS/RSA Priority Target Groups

Severely disabled: 39
Drug abusers: 0
Alcoholics: 0
Public offenders: 0
Other: 0

Clients on Vocational Rehabilitation Rolls: 39

Total Patient/Clients Served with R&T Center Funds: 39

RELEVANCE OF THE PROBLEM TO REHABILITATION:

Many of the functional skills and the psychological and social coping abilities that serve well within a rehabilitation hospital are inadequate resources as severely physically handicapped individuals leave this specialized protected environment and return to the larger society. Some persons manage to bridge the gap successfully between the institutional environment and the community, but these are usually persons with exceptional capabilities and resources. Current rehabilitation programs are largely lacking in methods to assist physically impaired persons in making this transition. For many handicapped persons, the demands of independent living and of educational or vocational productivity are more than can be managed simultaneously. Consequently, many potentially productive persons never have a chance to become independent, and they either retreat or are pushed into isolated environments. The New Options project is intended to develop and evaluate transitional programming designed to bridge this serious gap in rehabilitation services. Community integration and an active lifestyle can become feasible goals for many handicapped persons if they are taught and can practice new adaptive skills and if they are allowed to deal with stresses and assume responsibilities in a segmented sequence.

CURRENT YEAR'S ACTIVITY, PROGRESS, AND FINDINGS TO DATE:

a. Program Development: During the project's first year, major tasks were planning program content, assembling a staff, putting the basic transitional program into operation, and planning and implementing research procedures. In planning the project, core staff members traced the experiences of residents of the previous Cooperative Living Project and talked with them about how they initiated changes in their lives. There seem to be several important prerequisites for becoming actively involved in the community. One of these is having information about what opportunities are available and the knowledge of how to get needed information. The second prerequisite is the possession of certain personal skills that are needed in order to take advantage of available opportunities. These skills may include social assertiveness, diplomacy, an ability to budget energy well, or an ability to manage financial affairs. A third important prerequisite is a more general skill that may be termed problem-solving capability. This involves the ability to analyze a situation, to obtain new information, to make decisions, and to formulate sequential plans. It involves being able to anticipate consequences and to take action before crises develop.

In order to convey important information and to teach people needed skills, a series of 10 training modules were established. These modules are intended to show people the range of options available to them in (a) living arrangements, in (b) education/vocational training and employment, (c) in transportation, (d) in the performance of physical tasks, (e) in meeting medical needs, (f) and in sexual relationships. Modules are also offered to help people develop new skills in (g) managing financial affairs, (h) dealing with attendants and budgeting energy, (i) developing social skills and

assertiveness, (j) goal-setting and problem-solving. Each module meets one time per week and a typical week includes about 30 hours of planned program activities. Time is also built into the schedule for participants to work on individual projects such as drivers training.

A variety of teaching methods are used in the project. Training modules include classroom instruction, group discussions, and numerous fieldtrips into the community. The modules are usually co-lead by a regular staff member and a staff associate. The associates are handicapped persons who are actively involved in the community and who are paid to work in the project. They are an important resource, providing extensive information to participants and serving as behavior models. The staff has tried to choose a variety of associates who represent differing lifestyles and diverse values and viewpoints. The extensive use of staff associates is based on observation of the importance of modeling in the previous residential project.

The project has developed various resource materials in conjunction with modules. These include written materials for participants to take home in an individual notebook. Some modules have also been videotaped, and much more of this activity is planned.

The New Options staff includes a project director (anthropologist), a research director (psychologist), a social worker, a functional skills adviser with a background in physical therapy, and a part-time vocational counselor. In addition to organizing group activities, each of these persons is involved in goal-setting and problem-solving with participants on a one-to-one basis. The purpose of this counseling is to help the individual learn to solve problems on his own. This approach often involves departures from traditional professional roles in which staff members tend to solve problems for clients rather than letting them devise their own solutions. Many outside resource persons are also involved, including physicians, agency personnel, and other persons encountered by handicapped persons in the community.

An important element of New Options, in addition to the program content, is the experience of living for six weeks in a dormitory-style setting with a non-professional attendant staff. Participants frequently interact with each other informally on a one-to-one basis, and there seem to be some important effects of this close interaction with peers. Many participants have never been away from the personal care of family members or a nursing staff, and learning to manage the interaction with attendants and direct their own care is an important skill to be acquired.

The experience of the project's first year has yielded significant findings in several areas of program development:

- (1) Program Content: For the most part the planned program content has proven to be appropriate and useful from the viewpoint of both staff members and participants. A few changes have been made in the original set

of 10 modules. A new module has been added on the use of leisure time. The module on problem-solving proved to be too abstract to teach effectively, so much of its content has instead been incorporated into other modules. The social skills module has varied from cycle to cycle depending on the competencies and needs of particular groups of participants. In addition to core program areas for the participants as a group, time has also been set aside for 'electives'. These are experiences in the community arranged for one individual participant with special interests in areas such as cooking, gardening from a wheelchair, or exploring the feasibility of doing upholstery work.

Methods used to convey program content have evolved with experience to include more fieldtrips, more contact with a greater variety of staff associates, and the use of new media such as videotaping.

(2) Staffing: In general, the staffing planned for the project has been effective, though some changes have been made. The most difficult role to define and fill has been that of personal counselor. It has been hard to achieve a good balance between therapy on the one hand and more concrete planning and problem-solving with individuals on the other. More exploration is needed in this area. The staff has also learned that more time is needed from the part-time vocational counselor, and this position has been changed from 20% to 30% time effort. A new part-time staff position has been created for a Coordinator of Staff Associates. This individual is responsible for making logistical arrangements and for supervising the active handicapped persons from the community who conduct various program activities.

In viewing the project as a social system, it is interesting to note that one program staff member always seems to be a focal point of informal socialization among the group of participants. Initially this role was filled by the social worker, but when a new individual took over this staff position the focus of informal socialization was transferred to the functional skills adviser. All groups of participants seem to have a need for placing one professional staff member in this role.

(3) Residential System: A residential system using shared supportive services has been borrowed directly from the earlier Cooperative Living residential project. Experience has indicated a need for the attendant staff to understand and feel they are a part of the program as a whole, so several mechanisms have been developed to foster their involvement in other aspects of the program. These have included group meetings with members of the program staff and arrangements for individual attendants to visit some of the training modules. It has also become apparent through experience that a method is needed to assure that the entire staff responds consistently to participants' requests for physical assistance. This is particularly important in situations where individuals ask for assistance with tasks they can manage alone. Plans are currently being developed for each participant and the functional skills adviser to formulate a written contract as persons enter the program to make care needs an explicit part of individual program goals.

(4) Selection of Participants: Staff members and the project DVR courtesy counselor largely agree on the following characteristics as important traits in persons who seem to have benefitted most from the project: readiness to face life as a severely disabled individual; desire to make changes in lifestyle; willingness to set and work on some goals; willingness to risk experimenting with new ways of doing things and new kinds of behaviors; average intellectual capacity (comprehension of verbal input, no major memory deficits, reasonable attention span); ability to read; ability to speak well enough to be generally understood; ability to hear; no severe emotional pathology; and physical endurance for program (sitting tolerance, bowel control that is predictable, suitable urinary management).

The further refinement of criteria for predicting outcomes is an important project goal.

Experience has demonstrated that the program seems to be most effective when participants in a given cycle do not differ too widely in intellectual level. The program can be altered to accommodate persons at different intellectual levels from cycle to cycle, but it is an advantage if persons within any one group are relatively similar in this respect. Other types of diversity such as differences in rural or urban background, length of time since onset of disability, and general direction of future plans, can frequently be utilized to advantage in promoting group interaction.

One of the most significant problems in choosing participants is assessing the individual's degree of medical stability through reports from referring DVR counselors and physicians. Professionals who have not worked previously with severely physically disabled individuals may provide misleading information. In some cases participants have needed more medical care than the project was designed to provide.

(5) Expectations of the Program: A few project participants and referring DVR counselors seem to have held unreasonable expectations of what the program can provide. Such expectations are attached not only to the New Options project but to the notion of moving to Houston in general. Many persons hold an exaggerated view of the number of residential facilities, jobs, and supportive services available in the city. The staff has made an effort to define reasonable expectations and to communicate these before individuals enter the project. The following list represents the views of project staff and of the DVR courtesy counselor about what participants can expect to accomplish in New Options: gaining information on what opportunities are available in community (living arrangements, educational training programs, vocational availability, transportation availability); learning the skills to go about getting information; learning to manage financial affairs; learning to relate with attendants to get needs taken care of; learning to budget energy; learning to adapt oneself to new environment; learning to be more comfortable in public (being visible, asking for help); learning to examine how individuals interact with other persons and ways this might be changed; having the opportunity to be among other handicapped persons and learning how they cope with problems; examining feelings about issues important to each individual

(their identity, family relationships, sexuality, ability to control their life course); learning to define goals and directions; becoming more comfortable in experimenting with alternative ways of doing things; learning how to solve problems and having actual experiences where such learning can be practiced; help people learning sequential planning; and learning to anticipate problems and make plans on how to handle them before a crisis develops.

(6) Relationships with the Host Rehabilitation Hospital: In general the New Options project is perceived as having an identity somewhat apart from other Institute programs in the opinions of Institute staff, program staff, and DVR counselors from various parts of the state. This degree of separation has been intentional in some respects since the program was designed to develop a new service delivery model which includes new program content and new staff-participant relationships.

There are several types of linkages with the host rehabilitation hospital. One of these is the involvement of program staff members in other Institute structures such as departments or various committees. The relationship of professional staff members (including the social worker, physical therapist, and vocational counselor) to their respective professional departments is somewhat ambiguous vis-a-vis their administration responsibility to the project director since in general most departments are reluctant to detach persons for assignment to non-departmental entities. Linkages to the host rehabilitation hospital are also maintained through Institute staff members who assist the project by (a) consulting with the project staff or (b) presenting program content to participants. Links with other Institute programs that occupy the same annex building are minimal. Contacts do occur in cases of medical emergency when nursing personnel from another section of the building provide assistance to project participants.

(7) Relationships with the State Department of Vocational Rehabilitation: Contacts with the Texas Rehabilitation Commission occur at several levels. Information is exchanged with each participant's home counselor both before and after the individual enters the project. The project also has a courtesy counselor who works with the project staff in general planning and program evaluation and who also meets with individual participants during their six-week stay. The state Program Specialist for the Severely Disabled meets with the staff as needed to discuss general program evaluation and planning. The project has sponsored one two-day training workshop to acquaint counselors in the area with the program, and other such workshops are planned for counselors from other areas of the state. For the most part the relationship between the project and TRC is viewed positively by persons from both entities. Follow-up data indicate that most counselors feel the project has been helpful to their clients.

b. Longitudinal Research on Individual Outcomes: As of March 23, 1977, 35 individuals have been admitted to the New Options transitional project. Thirty one of these individuals were male and four were female. Twenty five New Options participants were single and ten were married, divorced or separated. Thirty one of the thirty five individuals were spinal cord injured and the others were severely disabled as a result of muscular dystrophy, polio, brain damage, and ataxia. Most of the individuals in the program were from 20-25 years old. The exact age range was from 17-53 years.

One variable which may prove to be critical in determining who can benefit most from the New Options program is time since onset of disability. Thirty three percent of the participants in the program had been disabled less than two years when they entered New Options. The most recent time since onset of disability was eight months. Another thirty three percent of the program participants had been disabled two to five years before they came to New Options. Finally, thirty three percent had been disabled more than five years before they participated in the program. The longest period from onset of disability to admission in New Options was twenty four years.

Another critical variable which may later be tied to potential to benefit from this program is the individuals' pre-admission living arrangement. Approximately half of the participants came from rural communities, and the other half were from metropolitan areas. Perhaps more importantly, ninety percent of the New Options participants were living with their family before they came to the program and the remainder came from institutionalized settings such as junior college, hospitals, and nursing homes. With respect to transportation, all but two of the thirty five participants were dependent on someone else to drive them. Seventy percent of these individuals depended directly on family members or close friends.

Each of the individuals in the program used either an electric or manual wheelchair for mobility. All of the participants had special bowel care needs, and eighty six percent depended on an assistive urinary device of some sort. Two thirds of the individuals in the program needed help transferring from their bed to their wheelchair or from their wheelchair to their bed. Most of them needed physical assistance dressing and bathing. Some needed assistance feeding and writing. Most of their physical assistance before they came to New Options was provided by family members or by individuals in the institution where they lived. Only four of the participants were physically independent from a functional viewpoint.

Another key variable to which much attention has been directed is that of income or economic level. More than two thirds of the individuals in the program had an income below \$200 per month before they came to New Options. Only two of the thirty five had incomes of more than \$500 per month and one of these two supports a family of thirteen.

Fifty percent of the participants had some kind of comprehensive medical rehabilitation before they came to the program. Thirty percent had limited medical or vocational rehabilitation, and twenty percent had no previous rehabilitation.

About fifty percent of the New Options participants had been in school before they were disabled. The remaining fifty percent had been working. Most of these individuals had been doing manual mechanical labor such as construction work, mechanics work, and agricultural work. Since the onset of their disability and before participating in New Options, about half of the individuals had tried to attend school. The other half had tried a variety of activities including reading, painting, mechanical work, stamp collecting, traveling, fishing, and "just getting by".

At the time of this report, follow-up information was complete on only eleven of the thirty five individuals. Follow-up is routinely done three to four months after each participant leaves New Options. Several significant changes in living arrangements may be noted for the eleven individuals on whom follow-up data are complete. Five former participants are now living comparably more independently than they were before their participation in New Options. Of these five, two are living in college dormitories and three have apartments of their own. With respect to the activities of these eleven individuals, six are now in school, three have part time or full time jobs, and two are "just getting by".

When asked three months after they had left the program what they got from New Options, three of the eleven individuals said that they were more aware of their own abilities or better oriented. Three individuals indicated that they were more independent, more self-confident, or more self-sufficient. Two former participants claimed that they had a better social life (i.e. dating, going out). Finally, seven individuals mentioned specific kinds of information that they received while they were in the program which they felt was particularly helpful to them. This information involved such subjects as living arrangements, financial affairs, budgeting, attendant management, and vocational educational opportunities.

In a routine effort to substantiate and validate the follow-up information and feedback received from New Options participants, each person who referred an individual to the program is contacted three to four months after that individual leaves the program. In each of the eleven cases in which data are complete, the referring individual was a vocational rehabilitation counselor. Eight counselors said that their clients seemed to be more self-confident, more independent, or more self-sufficient after they participated in New Options. Seven counselors said that they noticed a better outlook, a better attitude, or more motivation on the part of their client following participation in the program. Four counselors claimed that their clients were more goal oriented than they were before.

One counselor thought that his client had become exceedingly pessimistic as a result of his experience in the program and one other counselor believed that her client had selected unrealistic goals as a program participant. In spite of a few obviously negative statements, most comments from counselors who sponsored clients in the program were typified by the statement that "my client realized that he is ultimately responsible for meeting his own needs".

Since previous research suggests that gross behavioral activity levels in naturalistic settings may be better indicators of personal independence and behavioral adjustment than standardized muscle and function tests, several unobtrusive monitoring techniques including the Rest Time Monitor and Wheelchair Odometer are being used to continuously measure gross activity levels of New Options participants.

The Rest Time Monitor is an electronic device designed to monitor time out of bed. It consists of a series of pressure-sensitive ribbon switches located under the mattress of the study subject, and a slow-speed strip chart recorder placed in a remote location. When in bed, the subject's weight closes one or more of the switches completing an electrical circuit which produces a deflection of the recording stylus. The size of the deflection is proportional to the number of switches closed which is determined by the subject's position in bed. Subject movements result in amplitude changes on the recording paper which make it possible to identify artifacts and minimize measurement error. With continuous operation, the Rest Time Monitor provides a simple, inexpensive method of obtaining an objective, permanent record of the number of times and duration the subject is in or out of bed for each 24 hour period. Daily assessment of the Rest Time Monitor over the past 18 months has indicated that the measurements are highly accurate and reliable (Halstead, 1976).

In view of the fact that Rest Time Monitors have only recently been installed in the facility occupied by New Options participants, experience with this measurement method has been limited. Complete data is only available for one cycle of four New Options participants. However, these preliminary data promise some interesting findings. The average daily out of bed time for four New Options participants (three quadriplegics, one paraplegic) over an entire program cycle of six weeks was 11.2 hours per day. This compares to a daily best-week average of 8.5 hours reported by Halstead(1976) for fourteen paraplegics and quadriplegics who were in comprehensive rehabilitation programs at TIRR. These preliminary data support the assumption that severely disabled individuals continue to gain stamina and improve sitting tolerance after they complete a concentrated program of comprehensive rehabilitation. Further data will be carefully analyzed to determine what minimum sitting tolerance may be required for a severely physically disabled person to function in an independent living situation, a full time course load at school, or a full time job. Data from this Rest Time Monitor study may also be helpful in examining the likelihood of skin breakdown as a function of time out of bed. Finally, it appears as if data from the Rest Time Monitors will complement that obtained from the Wheelchair Odometers.

The Wheelchair Odometer is a mechanical device which may be attached between the spokes of a wheelchair wheel near the hub, and used to count the number of revolutions made by that wheel. The Wheelchair Odometer consists of four basic parts: a rotary ratchet counter, a weight attached to the counter arm, "stops" to limit the counter-arm excursion, and a clamp to attach the odometer the wheelchair spokes. The odometer works on a simple, mechanical principle. Operationally, a combination of gravity and the motion of the

wheel create a pendular movement of the counter arm. This pendular movement is achieved as the counter, which is fixed to the wheel, turns, and the counter arm, which is allowed to swing free, either lags behind or falls forward due to the pull of gravity. The counter adds one count with each complete rotation of its shaft, or with each full turn of the wheel. With a rotary ratchet mechanism, counts are added whether the chair is moving forward or backward. (Halstead, 1973).

In the present study, a Wheelchair Odometer is attached to one wheel of each of the wheelchairs used by the New Options participants. Each odometer is read during the noon hour every day, and cumulative counts are recorded and listed by individual participants. For each individual, the number of revolutions per day is determined by subtracting the number of counts recorded on one day from that of the following day. The actual distance traveled per day for each individual is determined by multiplying the number of revolutions logged by that individual times the circumference of the wheel on his or her chair.

At this point, useable data has been collected on thirty New Options participants through six full cycles of the program. Data on five other participants has been dropped for various reasons. Daily distance records for individuals appear to vary considerably from one day to the next. However, records of weekly distance traveled by individuals appear to be more constant and thus are more useful indicators of gross behavioral activity trends. Figures 1 and 2 are graphic representations of individual weekly distances traveled by New Options participants in their wheelchairs during the first two cycles of the transitional living program. Individual's mileage per week for the entire thirty subject sample ranged from 1.1 to 35.8 miles. The average weekly mileage per individual across the entire sample was 7.3 miles, or approximately one mile per day average per individual. Figure 3 indicates the average number of miles per week across one entire group of New Options participants for a complete program cycle. The vertical bars in this figure indicate the number of field trips, or occasions when the entire group traveled away from the annex on a planned outing. In all but three of twenty one possible cases thus far, the odometer readings co-vary with the number of planned outings for the week, reflecting the direction of change and relative magnitude of the gross behavioral activity level of the group.

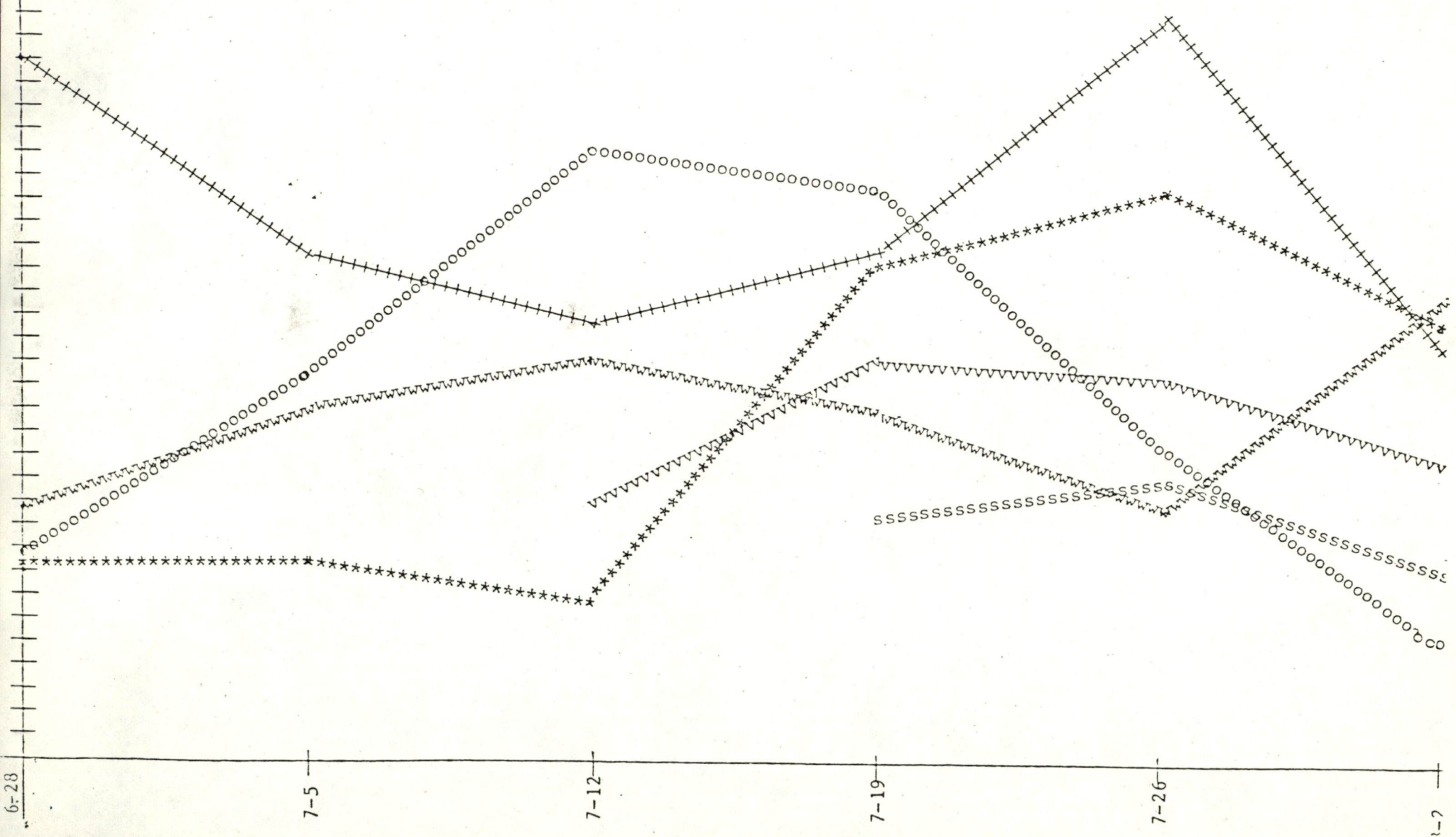
Odometer data have been analyzed to determine whether there are any significant differences in wheelchair activity between those individuals who use electric wheelchairs and those who use manual wheelchairs, or between those individuals who are more severely impaired and those who are less so. No significant differences in wheelchair mobility are apparent in either case. However, differences are very apparent when mileage records for those individuals with reported medical complications such as pressure sores and urinary tract infections are compared with records of the same individuals from weeks when no health problems were reported. Careful analysis reveals that more than eighty percent of the medical problems or complications mentioned in the physician's report during the first two program cycles, are

WHEELCHAIR ODOMETER STUDY

FIGURE 1

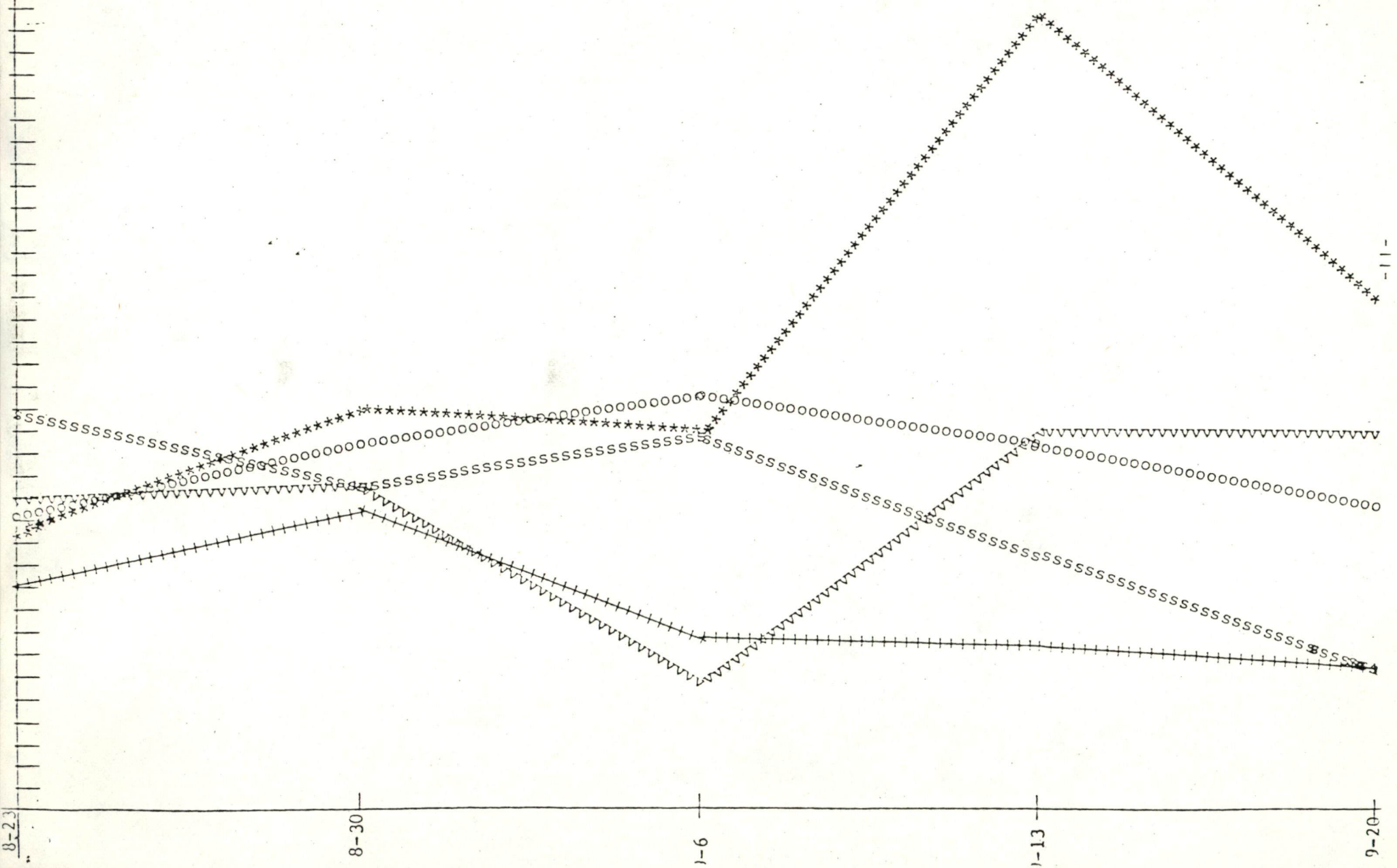
INDIVIDUAL READINGS (IN MILES PER WEEK)

CYCLE ONE



INDIVIDUAL READINGS (IN MILES PER WEEK)

CYCLE TWO



AVERAGE ODOMETER READINGS ++++++

FIELD TRIPS 8888

FIGURE 3

MILES / TRIPS

18 17 16 15 14 13 12 11 10 9 8 7 6 5 4 3 2 1

6-28 8888

7-5 88888888

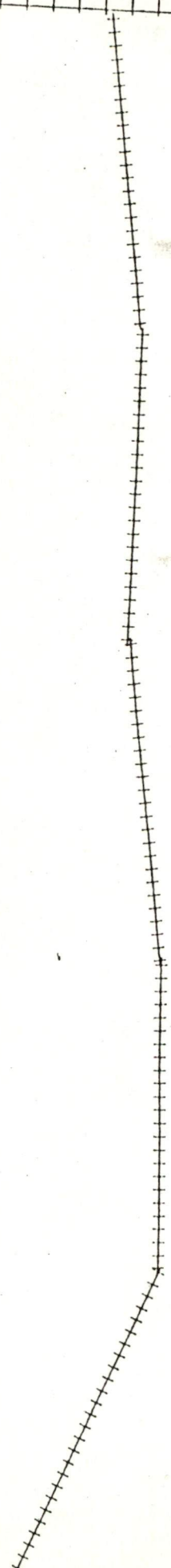
7-12 888888888888

7-19 8888888888888888

7-26 888888888888888888

WEEKS

888888888888888888



reflected in the individual's mileage record by a decrease in average mileage from the preceding week. In fact, nearly forty percent of all mileage decreases from the preceding week for individuals in these two groups appear to be the result of medical problems or complications.

The results of the Wheelchair Odometer study suggest that the average number of miles per week traveled by a person in a wheelchair may be a function of gross behavioral activity of the individual. The degree to which gross behavioral activity levels predict personal independence remains to be explored. The results do indicate, however, that there is a bottom mileage limit which an individual must exceed in order to perform independently all of the necessary and routine activities of daily life. Casual observations of the data and the behavior of the individuals also indicate that there may be a maximum level of efficiency, or average number of miles per week, which when exceeded, indicates that the individual is "spinning ones wheels" or "going in circles". It appears as though an individual must travel at least five miles per week and not more than 15 miles per week in order to maintain an efficient schedule of independent behavioral activities. In other words, activity levels below 5 miles per week may indicate severe behavioral dependence and those above 15 miles per week may signal the probability of future breakdowns, ultimately resulting in behavioral dependence. This hypothesis will be tested in the future by employing systematic behavioral observations of the individuals in the New Options transitional program, and comparing data from these observations with that obtained from the Wheelchair Odometers. Also, predictive validity of the Wheelchair Odometer study will be tested in the future by using follow-up interviews and questionnaires with the subjects to determine their routine daily activities and personal independence.

c. Planned Future Activities: Planning is currently underway to expand program development in the following areas: (1) improvement of follow-up services, perhaps through the addition of another staff member; (2) substantially increased production of program materials (written information, texts, workbooks, videotapes) for use in the program and for dissemination; (3) consideration of the advantages and liabilities of alternative program settings, perhaps the use of an apartment setting; (4) development of more referrals by seeking new sources of financial sponsorship for individuals in the project; (5) consideration of including participants with various types of disabilities.

DISSEMINATION OF FINDINGS:

The production of audio-visual and written materials on the content of the transitional project has been defined as a major objective since the project began. As the content of various modules has been developed and tested through experience, efforts have begun to present this content using various media. Written information has been developed and is being tested and refined in each of the content areas of the program. The staff has also begun to videotape various modules, starting with medical needs, living arrangements, and functional skills. The production of such materials will

increase substantially in the second and third years of program operation.

Information on the project as a whole has been disseminated through formal presentations as listed below. Staff members have also disseminated information on the project through personal contacts at conventions, meetings of advisory committees, and other visits to various agencies or facilities. In addition, the project has received and answered many written requests for information from handicapped individuals and also from representatives of agencies interested in transitional programming.

Papers and Presentations:

Cole, J.A. Independent Living and the New Options Transitional Project. Presented at Rehabilitation Counseling Department, University of Minnesota, February 3, 1977.

Cole, J.A., Frieden, L.F., Sperry, J.C., and Lavinson, L.J. New Options TRC Training Workshop, TIRR, March 22-23, 1977.

Cole, J.A., Holden, B.L., and Frieden, L.F. The New Options Project: A Live-In Program to Foster Social Adaptive Skills. Presented at the Annual Meeting of the American Congress of Rehabilitation Medicine, San Diego, November 12, 1977.

Frieden, L.F. Independent Living by Severely Disabled Individuals. Presented at the Annual Conference of the Oklahoma Rehabilitation Association, Tulsa, Oklahoma, August 16, 1976.

Frieden, L.F. New Options: Transition to Independence. Presented at the Annual Meeting of the American Psychological Association, Washington, D.C., September 4, 1976.

Frieden, L.F. Independent Living. Presented at the Oklahoma Conference for People with Mobility Handicaps, Tulsa, Oklahoma, April 2, 1977.

Frieden, L.F., Cole, J.A., and Sperry, J.C. New Options Transitional Project. Presented at a meeting of the Cooperative Rehabilitation Engineering Center, Houston, Texas, January 28, 1977.

Frieden, L.F. and Halstead, L.S. Application of Unobstrusive Longitudinal Monitoring Techniques to Assess Gross Behavioral Activity in a Non-Institutional Setting. Presented at the Annual Meeting of the American Congress of Rehabilitation Medicine, San Diego, California, November 11, 1976.

In addition to these formal presentations, in-service training programs were given by the New Options staff in the departments of social service, physical therapy, occupational therapy, and nursing at TIRR.

Written Materials and Videotapes:

- Carter, R.E. and Nelson, J.A. Mechanisms of Spinal Cord Injury. Texas Institute for Rehabilitation and Research, March 1977. (videotape)
- Cole, J.A., Sperry, J.C., and Frieden, L.F. New Options Participants' Guide. Texas Institute for Rehabilitation and Research, March 1976.
- Frieden, L.F. Choosing a Living Arrangement. Texas Institute for Rehabilitation and Research, May, 1977. (videotape)
- Frieden, L.F. Programs to Aid Handicapped Individuals. Texas Institute for Rehabilitation and Research, September, 1976.
- Rogers, J. and Nelson, J.A. Tissue Trauma, Texas Institute for Rehabilitation and Research, April, 1977. (videotape)
- Spencer, W.A. and Nelson, J.A. Respiratory Complications in Physical Disability. Texas Institute for Rehabilitation and Research, May, 1977. (V)
- Sperry, J.C., Cole, J.A., and Frieden, L.F. New Options Brochure. Texas Institute for Rehabilitation and Research, January 1977.

UTILIZATION OF FINDINGS:

Many of the products of this project may be utilized by severely disabled individuals and service providers. Research findings and information about sitting tolerances and stamina requirements with respect to functional independence is presently in demand. More than sixteen written requests for preliminary findings in this area have already been answered by the project. Representatives from agencies and organizations such as the Paralyzed Veterans of America, National Paraplegia Foundation, Center for Independent Living, United Cerebral Palsy, and Veterans Administration have already inquired about the possibility of making audio-visual training material developed by this project available to their members and clients. ~~Also, many of these same organizations are considering the possibility of sponsoring participants in the New Options transitional program.~~

Many materials will be appropriate for incorporation into both comprehensive rehabilitation and re-evaluation and follow-up programs at the Institute where patient education is a high priority. Many of the materials could also be used in day programs where a class or series of classes could be offered to handicapped populations through the sponsorship of various agencies. A recent workshop for DVR counselors also demonstrated the usefulness of New Options programming for counselor training on opportunities and resources for severely physically handicapped clients.

In addition to the use of project materials in other programs, a number of agencies have expressed serious interest in utilizing the project as a direct resource for their own clients. These include the Veterans Administration

spinal cord system, state DVR agencies in Montana and Oklahoma, and several workmans compensation insurance carriers.

POLICY, PROGRAM, OR PRACTICE CHANGES:

Many of the functional skills and the psychological and social coping abilities that serve well within a rehabilitation hospital are inadequate resources as severely physically handicapped persons leave this specialized protected environment and return to the larger society. Some persons manage to bridge this gap successfully between the institutional environment and the community, but these are usually persons with exceptional capabilities and resources. Current rehabilitation programs are lacking in methods and in defined approaches that will assist persons in making this transition. This gap in services has far-reaching implications for the entire field of rehabilitation. For most handicapped persons, the demands of independent living and of educational or vocational productivity are more than can be managed simultaneously. Consequently many potentially productive persons never have a chance to become independent and they either retreat or are pushed into isolated environments. Of those who do try to achieve an active and productive lifestyle, many are unable to meet the demands that it requires.

The New Options project is intended to develop and evaluate transitional programming designed to bridge this serious gap in rehabilitation services. Community integration can become a feasible goal for many persons if they are taught and allowed to practice the skills needed in the real world and if they are allowed to deal with stresses and assume responsibilities in a segmented sequence.

The results of this project may have profound consequences for the field of rehabilitation generally. If New Options is able to demonstrate conclusively that the acquisition of independent living skills and disability related information like that taught in the program is prerequisite to the optimal adaptation to severe disability, educational programs of this sort will almost certainly be demanded by vocational rehabilitation agencies and their clients, and provided by service, training, and treatment facilities across the country. Also, the man-environment approach applied here may be applied throughout rehabilitation - from early treatment through vocational placement and follow-up.

The results of this project may justify a shift of emphasis by public welfare and vocational rehabilitation agencies from treatment, training, and vocational placement to treatment, training, and socio-environmental placement. Specifically, this means that traditionally conservative state departments of public welfare may realize that independent living is ultimately a viable and cost-effective alternative to institutionalization for severely disabled individuals. This project may emphasize the need to treat chronically disabled individuals as a part of the total environment rather than as patients with problems that require narrowly focused attention.

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APPENDIX B

TEXAS INSTITUTE FOR REHABILITATION AND RESEARCH

ORIENTATION SEMINAR

NEW OPTIONS TRANSITIONAL PROJECT

FOR TEXAS REHABILITATION COMMISSION COUNSELORS
(Regions IV and VII)

March 22-23, 1977

TUESDAY, MARCH 22

- 1:00 p.m. Seminar Outline and New Options Transitional Project
Background Information
- Jean Cole, Ph.D. and Lex Frieden
- 2:00 COFFEE BREAK
- 2:30 New Options Program Content and Methods;
including Choice of Live Modules
- Jane Sperry, L.P.T.
- 5:00 ADJOURNMENT
Optional "Evening Out" with Former New Options Participant
or Staff Associate

WEDNESDAY, MARCH 23

- 8:30 a.m. DONUTS AND COFFEE
- 9:00 Projected Individual Outcomes and Program Effectiveness
- Jean Cole, Ph.D. and Lex Frieden
- 10:30 COFFEE BREAK
- 11:00 Optimum Participant Characteristics and Counselor
Expectations
- Jean Cole, Ph.D. and Linda Lavinson, M.S.W.
- 12:00 ADJOURNMENT
Optional Afternoon Tour of Community Residential Projects
or Texas Institute for Rehabilitation and Research

TEXAS INSTITUTE FOR REHABILITATION AND RESEARCH
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TEXAS MEDICAL CENTER
1333 MOURSUND AVENUE
HOUSTON, TEXAS 77030

P. O. Box 20095
Houston, Texas 77025

Telephone
Area Code 713, 797-1440

NEW OPTIONS SEMINAR EVALUATION DATA
SUMMARY FOR SEMINAR OF MARCH 22-23/77

16 Respondents - 15 VR Counselors
1 Regional Training Officer

The most frequently cited descriptors of program components were informative (62) and helpful (42). That portion of the seminar relating to New Options Program Content and Methods was most often mentioned descriptively (48). Accordingly, Background Information and Accommodations were the seminar components least often mentioned (26;16).

Eight individuals made favorable comments such as:

very interesting/ keep up the good work
a magnificent experiment and needed research
enjoyed it/ wish it were longer
very informative/ make it longer
very good
highly professional/ should be statewide
enjoyed informal atmosphere/ felt staff was
friendly and helpful/ information was interesting
very good program

Five individuals made no comments, and three made more critical observations. These observations addressed (1) excessive noise and distractions in the hallways outside the meeting room, (2) uncomfortable seats, (3) and a need for more outcome data.

With respect to the planned Optional Activities, all seminar participants stayed for the Medical Module in spite of the fact that five of them had previously indicated a preference for Living Arrangements. Several people complimented Dr. Carter's presentation. One individual took a wheelchair and spent the "evening out" with a staff associate. This individual commented quite favorably on his experience recommending it for his coworkers. One individual took the Residential Project Tour, visiting associates at Banyan and Windhill Apartments. Six persons took the tour of TIRR. Some of these individuals were reportedly antagonistic toward the Institute and some of its staff people. Two seminar participants

suggested making the optional activities a routine part of the seminar.

In comparing this seminar to others they had attended, 13 participants responded with favorable comments like:

more informal & enjoyable/ not too long
enjoyed relaxed atmosphere
enjoyed small group and interaction

Two persons said it was "too short", and one stated it was "average".

When asked for suggestions for improving the seminar, three participants suggested "more modules", three wanted more medical information, and others mentioned using a larger room, having more counselors, and having a longer seminar.

With respect to improving the New Options Transitional Program, ten persons had no comments, four suggested extending the program length, and two suggested relocating the project.

Nine participants reported that they intended to make appropriate referrals as a result of what they learned at the seminar. Five individuals said they would inform other counselors about New Options, and four participants said the seminar would help them to serve their severely disabled clients better.

APPENDIX C

APARTMENT CLUSTERS IN HOUSTON

Goodwill Apartments - Independence Hall

ADMISSION PROCEDURES

APPLICATION FORM(S)? *yes (see attached)*

PERSON TO CONTACT? *Ms. Lufburrow or Sandy Hogan*

WAITING PERIOD? *1 mo to 1 year; varies according to size
of apartment*

REQUIREMENTS?

be 62 years of age or handicapped

APARTMENTS YOU HAVE AVAILABLE FOR HANDICAPPED INDIVIDUALS

EFFICIENCY	<u>144 units</u>	(rent ranges from \$97 to \$142)
SINGLE	<u>128 units</u>	(rent ranges from \$118 to \$172)
TWO BEDROOM	<u>20 units</u>	(rent ranges from \$147 to \$214)
THREE BEDROOM	<u>0</u>	
FOUR BEDROOM	<u>0</u>	
TOTAL.....	<u>292 units</u>	

COSTS

ATTENDANT CARE \$ 260.00 monthly

24 hour care ; must fill out application and be
accepted

TRANSPORTATION \$ Goodwill van or minibus

\$0.20 each way (minibus); Goodwill van is \$1.00 each w

MEALS \$ not provided or prepared

RENT \$ varies according to income (see above)

rent is 25% of income.

APARTMENT CLUSTERS IN HOUSTON

Banyon Condominiums

ADMISSION PROCEDURES

APPLICATION FORM(S)? These condominiums are purchased on an individual basis. They are bought through a loan company.
PERSON TO CONTACT? Rodney Shaw - apartment manager
WAITING PERIOD? various (there is a long waiting period now)
REQUIREMENTS? (handicapped)

APARTMENTS YOU HAVE AVAILABLE FOR HANDICAPPED INDIVIDUALS

EFFICIENCY	<u>0</u>
SINGLE	<u>2</u>
TWO BEDROOM	<u>11</u>
THREE BEDROOM	<u>5</u>
FOUR BEDROOM	<u>2</u>

TOTAL..... 20 units in all (will be building more)

COSTS

ATTENDANT CARE \$ 175.00 (up to 14 hours/care a week)
\$ 230.00 (over 14 hours/care a week)

this is a 24 hour service; paid on monthly basis

TRANSPORTATION \$ 50.00 HOUSEKEEPING: \$50.00
sign-up sheet; paid monthly

MEALS \$ included in attendant care

these meals are prepared; individual is expected to have their own groceries

RENT \$ paid to loan company or title company

APARTMENT CLUSTERS IN HOUSTON

French Village Apts.

ADMISSION PROCEDURES

APPLICATION FORM(S)? *yes (see attached)*

PERSON TO CONTACT? *Ms. Dominques*

WAITING PERIOD? *varies; sometimes none at all*

REQUIREMENTS? *be quad or para; be active in school or work*

APARTMENTS YOU HAVE AVAILABLE FOR HANDICAPPED INDIVIDUALS

EFFICIENCY - 0 -

SINGLE - 0 -

TWO BEDROOM 12 units

THREE BEDROOM - 0 -

FOUR BEDROOM - 0 -

TOTAL..... 12 units

COSTS

ATTENDANT CARE \$ 210.00/monthly

24 hour service; housekeeping and preparing meals included in fee

TRANSPORTATION \$ use Goodwill van

pay as you ride; \$1.00 each way plus gas

MEALS \$ included in attendant care

RENT \$ \$195.00 now/ in August will be \$220.00/monthly

APARTMENT CLUSTERS IN HOUSTON

Willowood Apartments

ADMISSION PROCEDURES

APPLICATION FORM(S)? *yes*

PERSON TO CONTACT? *Ms. Barbara Miller*

WAITING PERIOD? *varies*

REQUIREMENTS? *handicapped*

APARTMENTS YOU HAVE AVAILABLE FOR HANDICAPPED INDIVIDUALS

EFFICIENCY	<u>12 units</u>	<i>rent is \$180.00/monthly</i>
SINGLE	<u>100 units</u>	<i>rent is \$215.00/monthly</i>
TWO BEDROOM	<u>37 units</u>	<i>rent is \$245.00/monthly</i>
THREE BEDROOM	<u>6-8 units</u>	<i>rent is \$300.00/monthly</i>
FOUR BEDROOM	<u> </u>	
TOTAL.....	<u>157 units</u>	

COSTS

ATTENDANT CARE \$ 215.00/monthly

includes 24 hour service/ 3 hours per day

TRANSPORTATION \$ 50 - \$75/monthly

Housekeeping and meal preparation is included

on a regular basis

MEALS \$ included in attendant care

RENT \$ see above

APPENDIX D

BIOGRAPHICAL SKETCH

LEX FRIEDEN

Lex Frieden is Director of Research for the New Options Transitional Living Project at the Texas Institute for Rehabilitation and Research in Houston, Texas. A graduate of Tulsa University, he has done graduate work in social and rehabilitation psychology at Tulsa University and the University of Houston. Mr. Frieden, a quadriplegic, is past secretary of the American Coalition of Citizens with Disabilities and now chairs the Government Relations Task Force for that organization. He is also active in the Houston Coalition for Barrier Free Living and the Council of Consumer Members of the National Rehabilitation Association. Mr. Frieden is presently working to develop a broad range of alternatives to institutional living arrangements for severely physically disabled persons in Houston. Having published several papers on independent living for handicapped persons, he recently edited the background paper on Community and Residential Based Housing for the White House Conference on Handicapped Individuals.

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Withdrawal/Redaction Sheet

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Document No. and Type	Subject/Title of Document	Date	Restriction	Class.
01. Resume	Resume [redaction] (2 pp.)	6/1/77	C	

Collection:

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WHORM Cat.:

File Location: I.L. [Independent Living] Training Grant R.S.A. Rehabilitation Services Administration] 1977

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LEX FRIEDEN

PRESENT POSITION: New Options Research Director
Texas Institute for Rehabilitation and Research

HOME ADDRESS: 9667 Meadowvale, Houston, Texas 77063

TELEPHONE: (home)-(713) 781-8949, (office)-(713) 797-1440
ext. 504

BORN:

(C)

EDUCATION:

Senior High School - Alva Senior High, Oklahoma
Graduated: May 1967 GPA: 4.0

Honors and Awards: President's Scholarship,
Oklahoma State University; Regent's
Scholarship, Northwestern Oklahoma
State College; President, National
Honor Society; State Representative
to Williamsburg Student Burgesses;
Valedictorian

College - Oklahoma State University

Dates: Fall, 1967 Credits: None- dropped
mid-semester due to automobile
accident

Honors and Awards: President's Council;
Residence Hall Council

Northwestern State College (Oklahoma)

Dates: Summer, 1967, 1968 Credits - 11

University of Tulsa

Dates: Fall, 1968 - Spring 1972

Graduated: December 1971 Credits - 129

Degree: B.S. Major: Psychology GPA: 3.52

Honors and Awards: Graduated With Honor;
Dean's Honor Roll; Psi Chi and Alpha
Kappa Delta Honorary Fraternities;
Vice President, Alpha Phi Omega Service
Fraternity; APO Outstanding Member -
1972

Graduate School - University of Tulsa

Dates: Spring, 1972 Credits: 9

University of Houston

Dates: Fall, 1972 - present Credits- 87

Major: Social Psychology Minor: Rehabili-
tation Dissertation and Thesis - in
progress: A Longitudinal Study of
Personal Independence in the Daily
Living Activities of Quadriplegics

Honors and Awards: SRS Doctoral Fellowship; S.W. Representative to Handicapped Consumer Leadership Conference, Boston, April, 1975; National Secretary, American Coalition of Citizens with Disabilities - 1975; Co-founder, Houston Coalition for Barrier Free Living; Delegate, White House Conference on Handicapped Individuals, May, 1977

EMPLOYMENT RECORD:

Dates	Agency	Job Title	Supervisor
Summer 1973	Baylor College	Research Asst.	Dr. Vineberg
Spring 1974	U. of Houston	Instructor	Dr. J. Malin
Summer 1974	Baylor College	Research asst.	Dr. Willems
Summer 1974	TIRR Annex	Resident Mgr.	Mr. D. Stock
Fall 1974	American Mensa	Test Proctor	Ms. Seitleman
Fall 1975	REC TIRR	Research Asst.	Dr. Krouskop
Spring 1976	New Options	Research Dir.	Dr. J. Cole

CONSULTANT POSITIONS:

1975 - Texas A&M University, Houston Goodwill Industries, Harris County Easter Seal Society, Cooperative Living, Interaction, Texas Institute for Rehabilitation and Research (TIRR), Harris County Mental Health and Mental Retardation Authority, President's Committee on Employment of the Handicapped

CONSULTANT POSITIONS:

1976 - White House Conference on Handicapped Individuals, New York University Institute of Rehabilitation Medicine, Texas Tech University, National Center for Law and the Handicapped, Texas A&M University, Texas White House Conference, U.S. House of Representatives Committee on Science and Technology

CONSULTANT POSITIONS:

1977 - Office of Handicapped Individuals (DHEW), Oklahoma Society for Crippled Children, Texas Rehabilitation Commission, Massachusetts Rehabilitation Commission, Tufts Rehabilitation Institute, Wichita State University, Washington D.C. Institute for Research Utilization, Rehabilitation Services Administration

PUBLICATIONS:

A Tale of Two Lives, Rehabilitation Literature, January, 1973

Organizing the Disabled in the Southwest, Achievement, June, 1975

Adequate Residential and Community Programs for Persons with Disabilities (Editor), Volume One: Awareness Papers, White House Conference on Handicapped Individuals, May, 1977

PAPERS:

- An Overview of Vocational Rehabilitation, 1970
- In Pursuit of Total Rehabilitation for the Paraplegic, 1971
- A Study of and Suggestions for the Application of Behavior Modification Techniques to Problems of Rehabilitation, 1971
- The Application of Brehm's Reactance Theory to a Traumatically Disabled Population, 1973
- Culture and Perception, 1973
- Public Transportation and the Handicapped: A Civil Rights Issue, 1975
- Measuring Changes in Activities of Daily Living Among Quadriplegics with the Personal Independence Inventory, 1975
- The Subject as Observer of His Own Behavior, 1975
- Independent Living Arrangements for Severely Physically Disabled Persons, 1975
- The New Options Project: A Live-In Program to Foster Social Adaptive Skills (with Cole and Holden), 1976
- Assessing Gross Behavioral Activity in a Non-Institutional Setting (with Halstead), 1976

PRESENTATIONS:

- Dedication Address, Tulsa Rehabilitation Center, 1972
- Commencement Address, Alva High School, 1973
- Student Statement, First Methodist Church, Tulsa, 1974
- Housing for Disabled Persons, Independent Living Conference, Berkeley, 1975
- Consumer Involvement in the Rehabilitation Engineering Center, REC National Meeting, Houston, 1976
- Consumer Members: An Asset to N.R.A., National Rehabilitation Association Regional Conference, Hot Springs, Arkansas, 1976
- Dedication Remarks, Texas Institution for Rehabilitation and Research, Houston, 1976
- Independent Living by Severely Disabled Individuals, Oklahoma Rehabilitation Association Annual Conference, Tulsa, 1976
- New Options: Transition to Independence, American Psychological Association Annual Meeting, Washington, D.C., 1976
- Application of Unobstrusive Longitudinal Monitoring Techniques, American Congress of Rehabilitation Medicine Annual Meeting, San Diego, 1976

Report to the Governor, Texas White House Conference on Handicapped
Individuals, San Antonio, 1976
Planning a Disabled Americans Act, American Coalition of Citizens
with Disabilities Delegate Assembly, Washington,
D.C., 1977
Independent Living, Oklahoma Conference for People with Mobility
Handicaps, Tulsa, 1977

ORGANIZATIONS:

Chairman, Governmental Relations Committee, American Coalition
of Citizens with Disabilities
Southwest Regional Representative, Council of Consumer Members,
National Rehabilitation
Association
Board Member, Quality Living, Inc., Texas
Commissioner, Commission on Rehabilitation Counselor Certifica-
tion
Advisory Board Member, Texas Rehabilitation Commission

HOBBIES AND INTERESTS:

Amateur Radio - WB5AFW; Boy Scouts of America - Eagle, Order
of the Arrow; Music - Oklahoma All-State Band, 1967; Sports -
Swimming

REFERENCES:

Dr. S. E. Vineberg, University of Houston, Texas
Dr. E. P. Willems, University of Houston, Texas
Dr. W.A. Spencer, Texas Institute for Rehabilitation and Research,
Houston, Texas

Additional information furnished upon request

social security number: [REDACTED]

(C)

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02. Resume	Curriculum Vitae [redaction] (1 pp.)	n.d.	C	

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CURRICULUM VITAE

NAME Jean Amspoker Cole
Baylor College of Medicine
Texas Institute for Rehabilitation and Research

ADDRESS 3724 Wroxtton
Houston, Texas 77005

DATE AND PLACE OF BIRTH

(C)

MARITAL STATUS Married; no children

EDUCATION

Undergraduate Rice University, Houston, Texas
B.A. in History, magna cum laude, 5/67

Graduate Rice University, Houston, Texas
Ph.D. in Behavioral Science (with
emphasis in anthropology), 5/73

EMPLOYMENT AND PROFESSIONAL EXPERIENCE

Counselor, Sheridan Army Education Center, 9/68 to 6/70

Anthropological fieldwork on social relationships and
patterns of interaction in Augsburg, Germany, 9/71 to 6/72

Research Director, Cooperative Living Residential Project,
Texas Institute for Rehabilitation and Research, 9/73 to 9/75

Instructor in anthropology, University of Houston, 1/75 to 6/75

Instructor in rehabilitation, Baylor College of Medicine, 2/75
to present

Project Director, New Options Transitional Living Project,
Texas Institute for Rehabilitation and Research, 9/75 to
present

CONSULTANT POSITIONS

Board of Directors, Creative Handicaps, Inc., 11/73 to 1/75

Board of Directors, Quality Living, Inc., 9/75 to present

Advisory Committee, Stout Vocational Rehabilitation Institute,
1/77 to present

CURRICULUM VITAE: JEAN AMSPOKER COLE

PROFESSIONAL ORGANIZATIONS

American Anthropological Association

Society for Medical Anthropology

American Congress of Rehabilitation Medicine

PAPERS AND PRESENTATIONS

Stock, D. and Cole, J. Forum on living environments for severely handicapped persons. American Congress of Rehabilitation Medicine, San Francisco, November, 1974.

Cole, J. Housing alternatives for severely disabled individuals. Presented at a regional conference on Medical Management of Spinal Cord Injury, Houston, Texas, April, 1975.

Cole, J. and Stock, D. Adaptive housing for the severely physically handicapped: a three-year study. American Congress of Rehabilitation Medicine, Atlanta, Georgia, November, 1975.

Cole, J. The role of assistive devices for the handicapped individual re-entering natural living settings. Presented at Second International Congress on Prosthetic Techniques and Functional Rehabilitation, Cannes, France, April, 1976.

Cole, J. Transitional living experiences for persons with severe physical disabilities. Presented at seminar on Medical Management of Spinal Cord Injury, Houston, Texas, May, 1976.

Cole, J., Holden, B., and Frieden, L. The new options project: a live-in program to foster social adaptive skills. American Congress of Rehabilitation Medicine, San Diego, California, November, 1976.

Cole, J. The new options transitional living project and independent living alternatives. Presented at seminar on Rehabilitative Management of Spinal Cord Injury, Tulsa, Oklahoma, June, 1977.

EXHIBITS

Cole, J. and Stock, D. Cooperative living: a new alternative. Displayed at American Congress of Rehabilitation Medicine, San Francisco, California, November, 1974; annual meeting of the National Paraplegia Foundation, Fort Worth, Texas, August, 1975; annual RT Centers meeting, Little Rock, Arkansas, April, 1976.

CURRICULUM VITAE: JEAN AMSPOKER COLE

PUBLICATIONS

Cole, J. Carnival and social interaction: a study of the upper social stratum of a German city. Doctoral dissertation, Rice University, May, 1973.

Stock, D. and Cole, J. Adaptive housing for the severely physically handicapped individual. Rehabilitation Counseling Bulletin, June, 1975.

Spencer, W., Stock, D., and Cole, J. Medical Rehabilitation and Long-Term Care, Noble paper on rehabilitation issues, August, 1976.

Stock, D. and Cole, J. The cooperative living project: a five-year study. Final grant report to RSA on the Cooperative Living Residential Project, June, 1977.

BIOGRAPHICAL SKETCH

BRYAN LEWIS

In 1971 Bryan Lewis received his BA degree in business management from the University of Texas and since that time he has been employed in various management positions. Specifically following graduation he worked as a sales manager for a furniture store for one year, as a merchandise manager for J.C. Penney for two years, as assistant manager of Bell's Department Store for two years, and finally as a business manager for an auto dealership for one and a half years until the time of his accident. He also served three years in the armed forces in military intelligence in Germany and Viet Nam. Mr. Lewis, a spinal cord injured quadriplegic, recently participated in the New Options Transitional Living Program at the Texas Institute for Rehabilitation and Research. He is now living independently in an apartment which he shares with a roommate.

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CURRICULUM VITA

Togor A. Russell, Jr., M.A.
11540 Chimney Rock, Apt. 140
Houston, Texas 77035

Phone: (713) 731-4208
Sec. Sec.: (C)
Birthdate:

EDUCATION

1) Graduate:

- a) University of Houston
4300 Calhoun
Houston, Texas
dates: 8/76 - present
degree sought: Ph.D. in Clinical Psychology
proposed dissertation topic: adjustment reactions to permanent physical disability
- b) California State University, Los Angeles
5151 State University Dr.
Los Angeles, Calif. 90032
dates: 9/74 - 6/76
degree earned: M.A. in Psychology (3/4/76)

2) Postbaccalaureate:

- a) California School of Professional Psychology
3755 Beverly Blvd.
Los Angeles, Calif. 90004
unclassified graduate student in clinical psychology
dates: 9/73 - 8/74
- b) California State University, Northridge
Northridge, California 91324
unclassified graduate student in psychology
dates: 2/70 - 6/72

3) Undergraduate:

Penona College
Claremont, Calif. 91711
dates 9/61 - 6/69
degree earned: B.A. (2/3/69)
major: English-writing; minor: history

EMPLOYMENT

- 1) Currently employed as consultant to New Options Transitional Project, Texas Institute for Rehabilitation and Research Annex, 105 Drew St., Houston, Texas 77006. Work with disabled who are attempting to acquire skills and knowledge for self-dependence and entry into mainstream society. Am particularly involved in area of financial management (i.e., getting and spending money).
- 2) Have been a member of SYNERGY, P.O. Box 199, Northridge, Calif. 91324, a private association of physically disabled persons offering consultation in both public and private sectors regarding disability and rehabilitation. Have consulted with Paccima Memorial Hospital, Paccima, California in developing rehabilitation program, including establishment of residential center for independent living.

- 3) Have worked part-time as the Assistant Coordinator of Handicapped Student Services at the University of Houston, 4800 Calhoun, Houston Texas (9/76 - 4/77). Wrote and edited monthly newsletter, provided information and services for handicapped students, and worked with academic and administrative branches of the university to represent the needs of handicapped students. Assisted in planning and coordinating Mobility Awareness Day, an event intended to raise awareness of issues of mobility both in the general and the campus communities; had specific responsibility for gathering information and organizing speakers (including myself) for classroom presentations around campus.
- 4) Have been part time instructor teaching introductory psychology at the community college level: (a) at Houston Community College, 22 Waugh Dr., Houston, Tx. 77007 (1/77 - 5/77), and (b) at Mt. San Antonio College, 1100 N. Grand, Walnut, Calif. 91789 (2/76 - 6/76).
- 5) Have been part-time research assistant and graduate assistant to professors in psychology department at California State University, Los Angeles, 5151 State University Dr., Los Angeles, Ca. 90032. Duties included library research (literature reviews), assistance in locating and selecting texts for graduate classes in social psychology, and preparation of examination questions for abnormal and social psychology classes.

ORGANIZATIONAL MEMBERSHIPS

- 1) Am a member of the Coalition for Barrier Free Living, a consumer oriented organization working for the rights and needs of the disabled in Houston, Texas.
- 2) Member of Southwest Wheelchair Athletic Association, an organization providing recreation and athletic activities for those in wheelchairs.
- 3) Member of Psi Chi, the national honor society in psychology.
- 4) Was formerly a member of the California Association of the Physically Handicapped, and organization working for the rights and needs of the disabled in California.

PAPERS

Master's Thesis--Psychosocial aspects of physical disability and its management: an examination of being crippled and constructions of reality. This is an extensive theoretical paper dealing with socially and individually experienced realities pertaining to physical disability. It includes a review of important literature in psycholinguistic theory and research and the application of such theory to physical disability.