A study of the American Association of Retired Persons

Lenora Gay Ingram

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A STUDY OF THE AMERICAN ASSOCIATION OF RETIRED PERSONS

by

Lenora G. Ingram

A thesis submitted in partial fulfillment of the requirements for the degree of Master of Arts in Political Science

Department of Political Science
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August 1996
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ABSTRACT

This thesis presents a discussion of the role of a public interest group and the potential impact of its participation in the public policy arena. The particular interest group being assessed is the American Association Of Retired Persons, AARP. An assessment shall be conducted through multiple factors. The first factor is the evolution of group theory in the discipline of political science. A second factor presents a historical path of the acknowledgement and development of interest groups in the United States. The remaining factors assess the interest group, AARP, as it relates to interest group theory and as it has evolved as an interest group existing in the American political structure. An evaluation is conducted in which AARP is viewed in respect to its unique characteristics of group size, financial base, leadership, and public policy involvement. The thesis is concluded with the belief that the American Association of Retired Persons has the potential to influence the direction of public policy in America because AARP has the internal structural elements to perpetuate as an organization; its membership, consisting of members fifty years and older, leads at the polls in voter turn-out; and because Americans are living longer, the membership roles of AARP are guaranteed to grow.
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CHAPTER 1

INTRODUCTION

The Research Question--An Overview: Has the American Association of Retired Persons (AARP), defined as a public interest group, served to influence public policy, as assessed through V. O. Key's model of Interest Groups in the political process? The purpose of this thesis is to answer the previous question by attempting to restate Key's theory of interest group participation in the political process in a fashion which permits its application to the study of large interest group behavior.

The ultimate objective of this study is to better understand the influence of a public interest group by assessing the functional elements of the group and by determining its effectiveness in influencing public policy, as it relates to the elderly. Consequently, this thesis shall venture to not only further the discussion of public policy and the elderly, but also to extend the literature on interest group development and behavior. Moreover, it will attempt to demonstrate the need to better understand the potential impact of a growing aged population and the American Association of Retired Persons as an interest group.
movement in respect to influencing and/or directing public policy formation. The predominant discussion will center on AARP in California and this interest group's activity on the West Coast and beyond. An elaboration of this thesis calls first for a discussion of the evolution of interest group theory and the growth of interest groups in the United States.

The Study of Interest Group Theory

The belief that groups have performed a significant role in the shaping of public policy is not new. However, what is new is the affirmation by political scientists of the 20th century that groups have historically served as active participants influencing policy formation.

In a historical perspective, Earl Latham and a small cadre of English philosophical pluralists consisting of Figgs, Maitland, G.D.H. Cole, and Harold Laski, were the founders of the pluralist theory. However, the study of interest groups was not thoroughly researched until the turn of the century by Arthur Bentley.

In 1908, Bentley described the role of interest groups in the political system as "achieving a favorable allocation of social resources through the institutions of


2Ibid
government." In essence, Bentley proposed that the government framework, made up of its many entities, is almost irrelevant without the presence of group demands and inputs which influence action.

During the period in which Bentley proposed his theory, the study of American political science was directed toward a legalist perspective. The political science field, in its inception, was still being established and academicians elected to structure research after European scholars. The result was that political science, as a study, emerged with a legal premise. Therefore, all aspects of the study of political science were compared to such things as formal documents and formal authorities, (i.e. Constitution). Consequently, other elements which may have also influenced institutions of government and policy formation were not addressed.

Supporting Bentley's criticism of the early American school of political thought for having a legalistic perspective, were scholars like Theodore Woolsey and Frank J. Goodnow. In as much as Bentley fought to move political science from a parochial legalistic study, he introduced a

'Ibid
'Ibid
'Ibid
'Ibid
'Ibid., p.7.
greater premise, one which demanded that governmental institutions not be seen as self volitional entities; they are instead "products of lower lying political groups." Bentley concluded that "the process of government consists of the conflict among groups for the control of the activity of governmental institutions." Therefore, government actions may be better understood if one sees each body, not as separate elements, but as groups, (i.e. legislatures, courts, municipalities, etc.). Bentley deduced that the political process was also based on group interaction; it is the "equilibration of interests, the balancing of groups".

For many years, Bentley's group theory, with all of its inquiries, was left without further assessment or address. The works that followed introduced a surface review of Bentley's theory. Two decades after Bentley's work on group theory, Peter Odegard introduced a descriptive study of the Anti-Saloon League. Tracing the evolution of this organization, from its misdirected inception to its conclusive amalgamation, Odegard discussed the dimensions of "techniques and strategies of pressure" of those opposing the Anti-Saloon League. However, at the conclusion of the work, there was no tool for assessment, with regard to group

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"Ibid., p.11.

'Ibid.

"Ibid., p.12.

"Ibid., p.11.
theory in the political process; instead, the result was simply a descriptive study of the Anti-Saloon League."\(^{12}\)

In 1929, E. Pendleton Herring introduced a study in which he examined the activity of over a hundred formal pressure groups.\(^{13}\) His categorization of groups and extensive assessment of their purpose and origin were seen as valid, and served as antecedents of later group theorists like David Truman.\(^{14}\) Consistent with the Bentleyan premise, Herring defined the individual [in the political process] as a "mere cipher in a larger and emergent unit: the organized group."\(^{15}\)

Another theorist, the last in the current group, who introduced categories by which pressure group activity may be organized is E. E. Schattschneider. Schattschneider discussed the role of economic groups in response to tariff revision legislation of 1929 and 1930.\(^{16}\) Schattschneider, like the two previous theorists, made reference to Bentley's study; however, none of these earlier works conducted an exhaustive analysis equivalent to Bentley. In the works following Bentley, each touched on some issue related to group pressure and interests, but none presented a

\(^{12}\)Ibid

\(^{13}\)Ibid

\(^{14}\)Ibid

\(^{15}\)Ibid., p.13.

\(^{16}\)Ibid
theoretical framework for assessing interest groups in the
political process and none approached the role of
individuals with respect to group activity until David
Truman and his work, *The Governmental Process*.17

David Truman proposed that the relationship between the
individual and the group should be seen not independently,
but concurrently and in response to the institutions in
which they function. By definition, the interest group,
according to Truman, is "any group that, on the basis of one
or more shared attitudes, makes certain claims upon other
groups in the society for the establishment, maintenance, or
enhancement of forms of behavior that are implied by the
shared attitudes."18 Whereas Bentley saw the individual as
a juncture in group activity, Truman surmised that
individuals, with their unique attitudes and attributes,
define the characteristics of the group and/or its "common
interests".19

Truman's assessment of the role of individuals in
group theory has also been supported by scientists in the
field of psychology. Responding to Sigmund Freud's
postulate that individual personality is "innate" and is
formed independently of surroundings, Karen Horney and Harry
Stack Sullivan, two contemporary psychoanalysts, proposed

that "basic forms of knowledge are collectives, not particulars." These two scientists held that personalities are formed in response to human interaction and interpersonal exchange. Therefore, group interaction and exchange directly influence individual attitudes, personalities, and belief systems.

The study of groups continued to evolve with the contemporary works of Parson, Easton, and Almond in their discussion of the multiple dimensions composing a political system. In each of their approaches the theorist proposed that "interests" and "demands" are elements of input influencing output, which ultimately produce public policy.

In a 1956 critique, David Easton discussed the theory of structural functionalism and the idea of interaction and equilibrium. Easton stated that the political process, the origins of interaction, and equilibrium, may be seen in diverse facets like "interest groups, parties and legislatures, for all of them join to create and direct

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policies in the political system".  

In 1966, Gabriel Almond stated that structural functionalism and its antecedents found in the pluralist process may be traced back to classical political theory found in the Federalist Papers. "The political theory of the Federalist Papers is preeminently a functional theory. The authors of the Federalist Papers were systems theorists as well, for they dealt with the interaction of the subsystems of the polity one with the other."  

Bentley introduced the theory of a political system responding to interest group demands through an allocation of resources. Truman added that the group is formed by the shared attitudes and interactions of its members. And Parsons, Easton and Almond concluded that even contemporary political system theory must acknowledge the importance of interest group demands introduced in the system which affect the outputs we call policy." Subsequently, it appears that the role of interest groups, as stated earlier by Almond, may have influenced the formation and direction of policy, as in the establishment of our nation, (i.e., Federalist Papers). Having presented a short discussion of

"Ibid


"Ibid

"Ibid

"Ibid

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group theory and original pluralist thought, the next issue to be addressed is the evolution of interest groups in American society.

The Evolution of Interest Groups in the United States

The existence of interest groups in American society is not a 20th century phenomenon, as some critiques would like to propose. Historically, the potential influence and impact of interest group activity were seen with such importance, that our nation's Forefathers took steps to address the potential control of government by special interests. In the Federalists Papers No. 9 and No. 10, Madison spoke of the need to regulate factions and control special interests:

A landed interest, a manufacturing interest, a mercantile interest, a moneyed interest with many lesser interests grow up of necessity in civilized nations and divide themselves into different classes activated by different classes activated by different sentiments and views. The regulation of these various and interfering interests forms the principal tasks of modern legislation and involves the spirit of party and faction in the necessary and ordinary operations of government."

The Founding Fathers may have predicted the need to control unlimited participation and intervention, on the part of special interests and factions; however, no one to date has disputed the fact that the amalgamous American

culture and unique system of government have given place to the existence of interest groups. For instance, prior to the birth of our nation, in 1776, conflicts existed between economic classes (i.e. Tory or Whig political preferences) and citizens maintaining strong political convictions, in divergent geographic locations in the country. As the nation's populace became more diversified, (i.e. race, ethnicity, religion, etc.), the United States became known as the "melting pot" in which group diversity and assimilation characterized the nation.

The Constitution of the United States and its Amendments have served as a blueprint to policy makers and a tool of defense and protection for citizens' of the nation. The document's essential guarantees regarding freedom of speech and association, as well as citizens' right to petition "their" government for redress of grievance, were as important to most citizens of this country as were their right to vote. In addition to the rights established by the Constitution for individual citizens, the separation of powers principle which is the framework of our national government, has encouraged other political organizations to pattern themselves after the federal structure and has served as a catalyst in the creation of multiple interest

"Ibid
"Ibid
"Ibid
"Ibid

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groups in this country.

The federalist structure, emersed in a system of checks and balances, has created a "decentralized" power structure in which policy decisions are made at the federal, state, and local levels. The consequence of this structure in the United States has been the multitude of diverse avenues of access at every level of government in the decision making process. Organizations like the U.S. Chamber of Commerce are federations and often their state and local affiliates may act independently of the national office to petition a grievance to any government entities at any and all levels.

The American culture and its unique system of government, supported by the Constitution of the United States, have motivated individuals throughout the world to cross American borders and gain access to freedoms protected within its borders. In as much as some individuals were drawn to this country seeking a better way of life, many others have remained here because of the open avenues of access to government which encourage interaction and participation in the policy making process.

Alexis de Toqueville, more than 150 years ago, proposed that the uniqueness of the American culture, (i.e. beliefs

"Ibid
"Ibid
"Ibid
"Ibid
of individuality, personal achievement, etc.), encourages residents of its borders to join groups." In *Democracy in America*, Tocqueville espouses the view:

In no country in the world has the principle of association been more extensively used or applied to a greater number of objects than in America... In the United States, associations are established to promote the public safety, commerce, industry, morality and religion. There is no end which the human will despairs of attaining through the combined power of individuals willed or united into a common society."

Although Madison and Tocqueville alike have expressed the existence and significance of interest groups in America, the continued growth and development of interest groups has occurred in stages throughout the evolution of our country. There have been periods of famine and drought, as group existence has been minimal to abundant. To date, the pluralist school of thought (i.e. Bentley, Truman, et al.) proposes that the formation of groups at divergent periods of American history has been a response to government action and the desire to remain a part of the social structure of democratic politics."

From the founding of this nation to the 21st century, Americans have continued to maintain a stronghold upon their right to organize and petition the government through the pluralist approach of group assertiveness and expression.

"Wilson., p.2.
"Ibid
"Ibid
In 1963, Almond and Verba theorized that American citizens were more involved in voluntary associations, moreso than four other countries: Great Britain, West Germany, Italy, or Mexico. "Fifty-seven percent of Americans surveyed reported that they held membership in a voluntary association compared to 47 percent in Great Britain, 44 percent in Germany, 29 percent in Italy, and 25 percent in Mexico." In addition to Almond and Verba's findings of volunteer group activity within the United States, it was concluded that Americans appeared to have a greater propensity to use small groups, of a formal or informal nature, to petition government on local and national levels.

The procreation of interest groups in America has been expressed by theorists as occurring at unique points in history. No one has been absolute in a theory of the specific period in which interest group formation, influencing the political process, actually started. However, there have been theories which assert the existence of explosive periods in American history in which group formation appeared to occur more rapidly than others. David Truman proposed that group formation has occurred in

"Ibid., p.7.
"Ibid., p.9.
James Q. Wilson concurred with Truman's "wave" theory of the evolutionary formation of groups in the United States; Wilson argued that three wave periods occurred between 1800 and 1940. Wilson held that the first major wave occurred between 1830 and 1860 with the formation of America's premier national organizations: the Young Mens Christian Association, the Grange, the Elks, and many abolitionist groups, three decades prior to the Civil War.

Wilson argued that the industrial revolution kicked off the second wave. In the 1880's, economic associations were formed expressing the interests of both labor and business (i.e. AFL, Knights of Labor and et.al.); and some organizations, like the American Red Cross, U.S. Chamber of Commerce, National Association of Manufacturers, American Medical Association, NAACP, Urban League, American Farm Bureau, Farm Union, American Cancer Society and the American Jewish Committee, were formed not long after. Following the formation of these organizations were others like the Audubon Society and the League of Women Voters, established in 1905 and 1920, they each share a long history with other economic interest groups established early during this...
period."

Wilson proposed that the reason there was a proliferation of groups during such a short period of time, most noticeably from 1900 to 1920; was due to three significant social changes in the establishment. The first change influenced the sudden growth of groups and is attributed to the communications revolution.** At the turn of the century, "radio, railroads, telephones, and national magazines made possible the internal communications required by national organizations..." facilitating national and international exchange of information." Additional factors affecting this sudden growth were government-imposed regulatory standards on business activity to which business groups responded by organizing and increased division of labor which spurred the upstart of economic associations." The final factor Wilson found which attributed to group proliferation between 1900-1920 was the diversity created by an influx of immigrants resulting in a more heterogenous American populous."

The third wave, the period which Wilson proposed actually started in 1940), and which other theorists concur

"Ibid
"Wilson, p.84.
"Ibid
"Ibid
"Ibid
"Ibid

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as being a watershed period of interest group formation in America, was the period from 1960-1970. This period was termed "group explosion" because the 60's served as a catalyst creating larger and more active groups which have continued to grow proportionately well into the current decade. The period coined as the "group explosion" also brought with it other unique factors relative to this period. Since the 1960's, groups have made Washington, D.C., the new focal point as "the scope of federal policy making has grown". Another significant attribute of this modern age of interest group involvement has been titled as the "participation revolution". Characterized by the expansion of associations established to promote an idea or cause, with no occupational affiliation required, these groups have ballooned into the mass populist. Fully one-half of such groups have formed since 1960, and by 1980 they had moved from 14 percent to 21 percent of all groups represented in Washington.

An additional attribute of the new age of interest group explosion was the changing role of government in its policy formation and establishment of laws regulating

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"Hrebnar and Scott, p.10.
"Ibid.
"Ibid
"Ibid
"Ibid
activities today, which were not regulated in the past. "In recent years, changes in the campaign finance laws have led to an explosion in the numbers of political action committees, especially among business, industry, and issue-oriented groups." Subsequently, as government entities have engaged in the policy making process, no consideration has been given to groups affected by the policy; these policies have spurred the activation and proliferation of interest groups as well."

Burdett Loomis and Allan Cigler defined two types of groups which are formed in response to governmental policy; they are recipients and service delivers." In the aged populist, where issues regarding the rights of the elderly are defended, Cigler and Loomis define recipient groups as being "mass-based organizations concerned with protecting—and if possible expanding-old-age benefits." One group which has been determined as the largest voluntary organization, representing the interest of the aged, is the American Association of Retired Persons (AARP).

"Ibid
"Ibid
"Cigler and Loomis, p.10.
"Ibid
A Theoretical Framework

The American Association of Retired Persons (AARP) is a public interest group which has the potential capacity to influence the formation and direction of public policy. The potential capacity is premised upon some internal and external organizational factors. According to V. O. Key, Jr., the factors or "inputs" from group activity in the political process are designated within three categories of antecedents, effectors or consequences. In light of these categories, Key raised three subordinate questions: 1) "What factors shape the values, structure and activities of interest groups?; 2) How do interest groups go about trying to achieve their aims?; and 3) What impact do political interest groups have on the acts and attitudes of individual citizens and policy makers".

The categories and questions raised by Key will serve as a backdrop to select issues for assessment. Moving from the general questions to the specific elements, Key continued his theoretical framework with specific short and long range elements in the political process which relate to organizational type, structure, and purpose. The five short range elements presented by Key are the following:

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1"Ibid
2"Ibid
3"Ibid
"group characteristics, alternative sources of influence, the targets of influence, the legal structure and general environment and interactions between the group and others (especially target populations)." Three long range elements relative to feedback are: "the effect of policy outputs on the general environment, on the legal structure, and on the group itself."

Key does not stand alone in assessing political activity; however, due to the thoroughness of his evaluation, it will serve as the primary framework for assessing AARP as an interest group with the potential to influence political action and policy making. Interest groups in the United States are important because they have influenced policy direction and development. Large interest groups, like the American Association for Retired Persons, are significant because of their unique group characteristics, one of which is AARP's potential to amass great political influence due to its large membership. This is a strength it may apply, if it elected to do so. AARP will likely gain more attention and political influence as socio-economic conditions change in California and throughout the country.

The most significant changes which may affect AARP capacity to influence is found in its memberships' 

"Ibid
"Ibid., 7.
individual political action. In the United States, there has been a decrease in mortality rates among the elderly, and they now live longer; the political activism of the aged in multiple sectors of society (i.e. geographic, economic, etc.) has also been on the rise."

AARP, as a prominent interest group, would have modest influence 40 years ago when life expectancy averaged 68.2 years of age." During the fifties, the United States was approaching the "baby boom" era in which births, and our fascination with youthfulness, were on the rise. The rights of the aged, in the workplace and in the domestic workforce, had not gained significant attention. Forty years later, life expectancy increased to 75.3 years of age; in 1995, expectancy had extended to the average age of 85." This factor becomes important when one considers the sharp drop in mortality rates and the fact that those who are now "voting age adults" make up a disproportionate percentage of the high school and college drop out ratio today." As the American political system evolves, its members also become more diverse in race, sex, religion, and most notably, the aged populist. The electorate will have to


"Ibid

"Ibid

"Ibid
the American political system evolves, its members also become more diverse in race, sex, religion, and most notably, the aged populace. The electorate will have to consider the varied interests imposing demands. Subsequently, political scientists must, therefore, consider the role of the aged in this process and their potential impact on policy making and implementation.

Interest groups have existed in the United States for centuries; however, it is the role of such interest groups such as AARP which gives meaning to the terms group power, politics, and influence. As stated by V.O. Key, Jr. in *Politics, Parties, and Pressure Groups*, the strengths of the political interest group are three: 1) these groups serve as a conduit, a connection between voter and electorate; 2) the interest group is a "bargaining agent" in the requisition of goods and services through public resources; and 3) these groups work to empower individuals, giving them a sense of identity and purpose in their world."

Therefore, government entities become the "target of influence", as designated by group members."

In essence, the interest group functions to promote the interest of the group (body), and in return, gives individuals a sense of identity, purpose, and control over


"Ibid
unpredictable circumstances in an everchanging climate of government and policy agendas. The test of a service-oriented interest group is whether its role as a "bargaining agent" can serve the organization. Or, as in many instances, does the group majority serve as worker bees producing for the queen (a smaller elite unit)? The queen is usually designated as an elite minority group of "educated, white middle class individuals, with a secure financial base"." These individuals are said to make decisions for the body.

AARP is an interest group based organization. Key questions which shall be discussed in this analysis are first, what factors have shaped the values, structure, and activities of AARP? Second, how has AARP set out in attempting to achieve its stated goals and interests? Third, what impact has AARP had on the activity and attitudes of individual citizens? And fourth, what influence has AARP had on the behavior of policy makers with respect to their role in policy making?

"Ibid"
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71 Ibid
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\[72\text{Ibid}\]
CHAPTER 2

ORGANIZATIONAL INCEPTION

In today's body politic, many elements exist to make up the whole. Charles Merrian stated, some 70 years ago, "Of great significance in the composition of any political party (or group) are the numerous types of social grouping. These elements are known as subcoalitions, for they exist within the party and are identified on the basis of ideology and or social cohesion." AARP may be viewed as a subcoalition due to the fact this group finds common ground and identity in the factor of age and challenge for survival in a youth-oriented society.

There has been no consensus on the total number of active interest groups in the United States. However, at the national, state, and local levels of American politics, Denise Akey, editor of the Encyclopedia of Associations, has enumerated over 14,000 national nonprofit organizations."


7Ibid

25
Of the existent 14,000 organizations, the elderly have amassed strong representation. There are over 83 organizations in the U.S. alone which serve to promote and guard the interest of the aged in the formation of American public policy. A few of the most notable are: the National Council on Aging (NCOA), the Grey Panthers, the National Council of Senior Citizens (NCSC), Promote Real Independence for the Disabled Elderly (PRIDE), Zonata International, Children of Aging Parents (CAPS), National Institute on Aging (NIA), U. S. Administration on Aging (AoA), Over the Hill Gang, the Ethel Percy Andrus Gerontological Center and diverse other groups promoting aged interests.\textsuperscript{75} Organizations like these are united by the senior age of their membership and the issue that the aged population is their targeted interest group. Like the AARP, these groups are growing daily in membership as life expectancy in the U.S. rises and aged individuals become more socially and politically involved.

AARP is an interest group organization which prides itself on being nonpartisan. The membership serves voluntarily and meets one basic requirement; they are 50 years of age or older. At present, with membership at over 35 million, AARP is known as the "leading" organization in

\textsuperscript{75}Ibid
the United States representing the interest of individuals 50 years of age and older. The membership rolls are expected to grow as the U.S. population, with graduated percentages of aged individuals, expand into the year 2000.

The purpose of the organization, as stated in the AARP pamphlet "All About AARP", is to serve as educator, regarding political, social, and personal issues, to its members. AARP also acts as an advocate for its members by participating in legislative and judicial actions. AARP is renown for its public policy activism and involvement in national issues like Medicare and Social Security V. O. Key, Jr. earlier stated that antecedents in analyzing interest-group organizations and activity are the factors shaping the values of the organization. A primary factor which directly influenced the values formed by AARP was established by its founder when the organization began.

AARP Origin

The American Association of Retired Persons, found its inception through the organization, National Retired

76Ibid

Teachers Association (NRTA).  

Founded by Ethel Percy Andrus in 1947, a retired teacher in California, the NRTA was formed in response to what Mrs. Andrus and other teachers felt were inadequate pensions and health care for retired teachers.

In 1955, there was no Medicare program; therefore, Mrs. Andrus collaborated and received financial support from Leonard Davis, an insurance representative, to create a program for retired teachers. Mrs. Andrus and Mr. Davis established a national group health insurance program for elderly teachers. Because the health program caught the interest of retirees nationwide, Mrs. Andrus elected to form another organization which would serve teachers and retirees alike. The organization formed in 1958 was AARP. When Congress enacted Medicare in 1964, a government-sponsored health insurance program for individuals 65 and older, Mrs. Andrus and other members of AARP believed Medicare was not comprehensive enough or sufficient to meet the needs of the aged; they responded proactively. AARP responded by modifying the existent AARP health insurance program. The modification created health care coverage which would minimize the disparity between retirees' needs and available

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"Introducing AARP," p. 3.

Ibid, p.5.
resources by providing supplemental resources to its members.\textsuperscript{80}

Mrs. Andrus served as president of NRTA/AARP from the organization's inception until her death in 1967.\textsuperscript{81} Since 1967, the impact and legacy of Ethel Percy Andrus have not only been felt and experienced in the daily lives of 33 million AARP members, but also Dr. Andrus ushered in a new perspective on aging for intellectuals and the population at large. One of these benefits is free and unlimited access to the Ethel Percy Andrus Gerontology Library. According to Mrs. Stella Fu, Gerontology Librarian at University of Southern California (USC), the library was established in 1971 on the campus of the University of Southern California, Los Angeles. The library serves as a regional and national resource base for retrieving historical and contemporary information on the issues of the aged population.

When AARP was conceived, under the umbrella organization NRTA, it shared administrative support and office space with NRTA. However, due to a phenomenal public response to a direct-mail marketing campaign in 1959, the organization ballooned into a constituent body of 150,000.\textsuperscript{82}

\textsuperscript{80}Ibid, p.4.
\textsuperscript{81}Tassel and Meyer, p. 16.
\textsuperscript{82}Ibid
As the new decade rolled in, so did AARP membership, graduating from 1 million in 1969 to 9 million in 1975.  

**Development**

In 1982, AARP administrators chose, in response to the continued growth of AARP membership, a need for economic efficiency and just good business sense, to become the parent organization, and made the previous parent group, NRTA, a division. In addition, by 1983, AARP dropped the age of enrollment into the association from 55 to 50; subsequently, the result was an 80% increase, with a membership growth of 33 million by 1991. Today, AARP administrators estimate membership to be approximately 35 million members strong nationwide.

The growth and mainstay of the organization may be attributed to a number of factors. One factor is the point that AARP is one of the few organizations in the United States which does not promote the theory that being young is an attribute and being aged is a detriment. Furthermore, in the American system of education, citizens are taught the importance of the Constitution and its protective tenets.

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93Ibid
94Ibid
95Ibid
Therefore, the elderly may exercise their right to petition officials if their domestic interests collide with policy formation on the national level. In addition, what was once a chasm has now become a closing gap in the comparative population growth between youth and the aged. Population disparities are significant when one evaluates the roles of diverse age groups in the population.

Young adults (those 20-64 years of age) in 1990 made up 49.2% of population growth and have an expected growth of 40.5% by 2050.\(^6\) This was in comparison to the aged, (being 65+); in 1990 they were at 40.5% and have expected growth at 41.6% by the year 2050.\(^7\) As projected, there will only be a 1.1% differential and these two groups will be almost parallel in growth. Subsequently, with the aged having almost equivalent population growth to youth, coupled with the point that they remain the most active in political involvement, AARP is destined to grow in membership and political influence.\(^8\) In addition, a new direction in the process of public policy making could also be on the brink of a new era. This new era may be ushered in by the response of voter turnout among younger groups.

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\(^6\)Statistical Record of Older Americans, p. 49.

\(^7\)Ibid

\(^8\)Ibid
which has been sporadic and inconsistently low in comparison to the elderly populous.

Voter turnout of young adults (18-20) between the period of 1980-1988 ranged from a low 18.6% in 1986 to a high 35.7% in 1984. Comparatively, during the same period of time, mature adults, 55-64 years of age, had a low 62.7% turnout in 1986 and a high 72.1% high in 1984. The percentages reflecting mature adult participation are expected to grow. Subsequently, the gap created by high turnout of the aged, in comparison to low turnout of youth, is also expected to grow.

The crux of the comparative percentages, between youth and mature adults, rests in the fact that if the aged are growing in numbers and they continue to take the lead in voter turn-out at the polls, mature adults and the elderly will be in the position to potentially dictate the direction of public policy for this nation. The impact of such activity will only be realized with the continued decrease in mortality rates and the persistent involvement of the aged in political activity. Henceforth, the direction of policy making will change as will the "traditional" roles of the aged in American society.

Ibid, p.800.

Ibid
CHAPTER 3

ORGANIZATIONAL STRUCTURE

The role of the aged in policy making is influenced by the framework and avenues of access established within the interest group structure. According to V. O. Key, Jr., interest group organizational structure is one of the factors which should be considered when assessing interest activity in the American political process. The unique characteristics of organizational structure are important because they draw attention to issues like charter and provisions, goals and activities and internal relations with diverse segments of the organization.\(^1\)

These "internal characteristics may determine how effective the group is in pursuing and achieving goals; they may also limit the tactics which the group employs".\(^2\) Key added the note that structure may provide unity within the body of organization. And a unified group may gain more influence than another organization which has a fragmented

\(^1\)Zisk, p. 7.

\(^2\)Ibid
body and provides no security to its membership. In support of Key's premise, Hrebenar and Scott upheld the premise that among the most crucial characteristics of a group are its "structural aspects of the formal organization." AARP is a well developed and structured organization with designated titles, duties, and expectations for all of its group leadership. Evidence of this premise is supported by an evaluation of the organization on the local, state, and federal levels.

Local Structure

In the AARP, on the local level, membership is contingent upon one element, members must be 50 years of age or older. The organization is indeed concerned about bringing in new members and prides itself on gaining 8000 new members a day. AARP activity on the local level is dictated by the national office in regard to the established standards of membership enrollment and the philosophy that the organization exists to "serve, not to be served." In addition, local chapters assist newcomers by being inclusive.

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33Ibid
34Hrebenar and Scott, p.10.
35Tassel and Meyer, p.16.
and promoting interests which are mutually beneficial to the organization and its membership.

An important role is performed by AARP in that AARP appears to recapture the dignity which was taken away, or forfeited, by the aged in our society. For instance, Levin, in his 1980 publication stated that as individuals grow old, they often experience a loss of autonomy, power, influence, and authority which is often received by prejudice in society.97

AARP assists the aged in regaining their dignity. This reacquisition begins on the local level of the organizational structure with community volunteers reaching out to neighbors.

Individuals who make up local chapters consist of 3,700 groups throughout the United States.98 Local chapters were first formed in 1960 and are administratively managed under a volunteer network in area offices. There are ten representatives for all 50 states. Four volunteer positions which are highly visible and important to maintaining local organizational structure are: 1) Area Vice-President (AVP), 2) Associate Area Vice-President (AAVP), 3) District


98Tassel and Meyer, p. 17.
Director and (DD), and 4) Community Coordinator (CC).

The AVP is the association's principal representative in the local area who identifies and recommends individuals for volunteer officer positions and develops and carries out the Area Management Plan to meet the unique needs of individuals in the area. The AAVP assists the AVP in duties as assigned.

The District Director (DD) is the principal volunteer representative of the Association, assisting the State Director and/or Associate State Director. The DD coordinates district wide activities, i.e. recruiting and training of Community Coordinators and the formation of community councils and the Chapter Organization Specialist. The Community Coordinator (CC) is the Associations' representative in a defined community or district. Assisting the DD, the CC assists chapters, community councils and coordinates other AARP activity on the local level as assigned.

According to Ted Andersen, a former Rand Corporation executive and currently (California) San Gabriel Valley's Associate State Director with AARP, "Out of the total

"Ibid

`AARP's Portfolio of Service: A profile of the community programs, services, and issues addressed by AARP. (Washington, D.C: AARP Programs Division), 1994."
national membership, two to four percent of these members hold chapter membership". The structure of the local chapters consists primarily of three non-paid administrative personnel (AD, DD, and CC). The senior is the Associate State Director, who maintains contact with all chapter District Directors and works as a conduit to channel questions and concerns up and down the national and local association circuits.

Mr. Andersen stated that the California AARP is unique for many reasons. One reason is that "California is currently the only state with eight Associate State Directors. This is due to the large AARP membership base here in the state." The District Directors report up to the Associate State Director, overseeing the needs of the chapter and his Associate Director. Chapter DD's interface with all local organizations involved in chapter concerns and receives guidelines designed by state and national headquarters from Associate State Directors. Under DDs are Community Coordinators who oversee individual issues of interest to the association.

Individual regions each have Area Vice-Presidents (AVP)


102 Ibid
and the national office of AARP integrates local chapters by designating that half of the delegates at AARP conventions should be chapter members. Another incentive for local chapter members is the point that AARP also provides free training courses to all volunteers; these positions range from the local chapter members up to the national office. The paid staff consist nationwide of 1,600 individuals who provide members, volunteers, and the public with administrative support and technical expertise.

Members on the local level, (staff and volunteer) are the true work horses of the organization. Working on the frontlines, these individuals are involved in diverse activities and programs, such as: providing educational and community service programs, consumer affairs, criminal justice, healthcare, residential living and counsel to widows and widowers. The foundation of the AARP is its local volunteers. They are the heart of the organization. They see, hear, and respond to members concerns on contact. These individuals receive personal requests, respond to multifaceted needs, and take action by forming groups, coalitions and networks. These networks serve as channels

103 Tassel and Meyer, p. 17.
104 Ibid
105 Ibid
between agencies who either resolve the problem or impede progress toward a solution. These volunteers are proactive and they get involved to change the circumstances.

In AARP's "Portfolio of Service", January 1994 publication, there is a detailed description of local volunteer titles and their duties. The following are the primary titles and their description: 1) 55/ALIVE Mature Driving Instructor-training specialists and instructors administer traffic safety programs to AARP members and the community; 2) Health Advocacy Services (HAS)-Interfaces with state coordinators to promote HAS issues and network with related agencies; 3) Tax-Aide local coordinators link with counselors and instructors to educate Association members and the community on tax issues and inquiries; 4) Work Force Programs provide local volunteer consultants who personally inform the public at large, and AARP members alike, about their employment rights, job retention, and transition into retirement; 5) Legislative Committees in states with large aged populations, (i.e. California, Florida, and New York), provide volunteers network between metropolitan dwellers and legislators regarding AARP's public policy positions, they are Metropolitan Area Satellite Group Chair and group members; 6) Widowed Person Service, 7) Minority Affairs program, 8) Universal Programming and 9) Women's Initiative

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program serve the special interest of their participants.\textsuperscript{106} Theorists of the past and present have proposed that there is unequal participation among groups in American society. Schattschneider is one theorist who has been joined by contemporary group theorists, like Zeigler and Cigler, in proposing that because Americans with more surplus time and money are more apt to join associations, therefore, the pressure group system has an upper class bias.\textsuperscript{107} Unlike some organizations which are dominated on the local level by white, middle-upper class intellectuals, who have earned graduate level educations.\textsuperscript{108} AARP has instituted a mechanism of change in an attempt to reach a broader social base. Ted Andersen, San Gabriel Valley's Associate State Director stated, "the AARP is admonished for its basic business sense and sensitivity to social change".\textsuperscript{109} Like Martin D. Omato, the California State Legislative specialist, Mr. Andersen believes that "the most recent change is the thrust and image of the AARP is that it is becoming more diverse (i.e. ethnicity, sex, income, training)."

\textsuperscript{106}Ibid
\textsuperscript{108}Ibid
\textsuperscript{109}Ted Andersen. Interview
education), where in the past, its membership was primarily white, upper middle class."®®® AARP's desire to self-assess its outreach activity on the local level is an antecedent strength which will potentially provide stability for the organization. Strength and stability may be achieved because AARP leadership has begun to meet the challenge of attempting to reflect an organization which reflects the economic and culturally diverse aged population in America.

In the past, the national office in Washington was viewed as a dictator, delegating authority and policy issues and priority. According to Mr. Andersen, "The new theoretical premise from national, (headquartered in Washington, D.C.), is that chapters may, and should, serve by acting as liaisons providing information and support to local chapter members and channeling information up to national regarding members interest. In response, local chapters should remain ready to mobilize the members when called."®®

The strength of AARP exists in their response to change, in the past, the organization was built on the pyramid theory with the national office at the apex. According to Ted Andersen, today, national has inverted the

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pyramid and placed itself at the bottom with the understanding that local chapters receive the request of members first hand, and truly know the issues and the concerns of membership on the local level. However, Mr. Andersen concluded, "The real challenge is changing from what has been a traditional pyramid practice, (administrative control from the top down), to what is desired as a rank and file" (participatory structure).\(^\text{112}\)

Unlike some select interest groups which may find identity and political clout in a homogenous membership body, it appears that AARP's strength rest in its goal of membership diversity and an ability to be promote inclusion to a group of individuals disenfranchised in multi-sectors of society. AARP members gain power, prestige, and a voice on significant policy issues, not withstanding personal worth through volunteer contribution and participatory inclusion-back into their society. AARP and its members have found that a mutual exchange is a prudent investment.

**State Structure**

The value of the internal characteristics, as expressed by Key in respect to organizational structure, is also valid on the state level. Assessment may be made when

\(^{112}\)Ibid
evaluating AARP's organizational structure and the effectiveness of the group in achieving its goals and interacting with the local and federal entities. The structure and activity of the AARP on the state level is well defined and the roles of their members are clear as well. The organization and its state level personnel have a unique role in AARP organizational structure.

State level AARP participants function in a manner similar to local member activity. State titles, duties, and expectations are clearly designated and defined to provide a support base which is unique to the organization.

In the area of state legislation, the chief volunteer representative and coordinator for the AARP is the State Director (SD). (Her counterpart in NRTA, representing retired teachers, is the State Coordinator for Retired Teachers.) The SD primarily recommends and supervises District Directors (DD), volunteer specialists, and coordinators for retired teachers. In addition, she may also serve to promote the interest of AARP in carrying out the State Management plan and budget on the local level.

The association State Director (ASD) assists the State Director and supervises activities of DDs by providing orientation training to volunteers and serving as the chief volunteer representative within designated regions of the
state.\textsuperscript{113}

In addition to the AARP state personnel earlier mentioned, who serve as local association representatives of AARP and espouse the goals of the national office; there are also volunteer state program coordinators. Of the current 36 programs which are organized and operated by AARP, almost all have a state representative.

Under the 55 ALIVE/MATURE Driving program in California, Barbara Smiley is the operator who carries out daily managerial activities of the organization. Barbara also promotes the program on the state level and introduces the program to new areas where it had not existed before. The program manager of the 55 Alive program is assisted by the Associate State Coordinators and Assistant State Coordinators.\textsuperscript{114} The Health Advocacy Service (HAS) has multiple state coordinators because healthcare has remained a primary issue on the forefront AARP's policy agenda. Marty D. Omato is the California State Coordinator who serves as a conduit between local and state AARP leadership to ensure that information is efficiently disseminated and expediently received. The information he provides supports

\textsuperscript{113} AARP's Portfolio of Service: A profile of the community programs, services, and issues addressed by AARP.

\textsuperscript{114} "California Legislative Update". (California: AARP, October, 1995)
the association staff, administrators, and volunteers who have policy questions.\textsuperscript{115}

Along with an Assistant State Coordinator, the HAS State Coordinator also works with other HAS state specialists: the Health Promotion Assistant State Coordinator—Barbara Smiley; the Medicare/Medicaid Education assistant State Coordinator—John Daniel and; the Long-Term Care Assistant State Coordinator—John Daniel and Jimena Ismerio.\textsuperscript{116} Each state coordinator educates, recruits, and promotes the interest and needs of the Association and its members in each of these areas.\textsuperscript{117}

In addition to serving as educators to state and local community members, state coordinators perform the unique and important role of providing on-going training to local coordinators and establish communication avenues with other health and aged sensitive organizations.\textsuperscript{118}

The state coordinator of the Work Force Program (WFP) interfaces with diverse components and members which perform significant duties relative to employment. As the State

\textsuperscript{115}Ibid

\textsuperscript{116}Ibid

\textsuperscript{117}Ibid

\textsuperscript{118}AARP's Portfolio of Service: A profile of the community programs, services, and issues addressed by AARP.
Coordinator, he oversees all activities within the state which may entail directing and managing specialist coordinators in diverse areas. Areas of assistance may be employer outreach, employee equity, and other employment-related issues. He is also the member of the Association's state leadership team. Assisting the State Coordinator is the Area Coordinator and twelve other employment related components. These twelve address, mediate and support the interests of AARP members.

AARP has designated a body of individuals which exist on the state level to interface with the local and national offices in providing public policy making information, they are the State Legislative Committee. Eight official titles exist under the title of State Legislative Committee: 1) State Legislative Committee Chair assists in recruitment, orientation and training of new committee members and represents the committee on the state Leadership Council; 2) the State Legislative Committee Vice-Chair, assists the Chair, 3) the State Legislative Committee Secretary, maintains and distributes minutes of meetings, 4) State Legislative Committee Members-they are the heart of the committee, (in California there are fourteen), they exchange, promote and challenge state policy, legislative activity and member support; 5) Capital City Task Force.
Coordinator- organizes, establishes agendas, and evaluates activities of CCTF members. Capital City Task Force Members-serve "lobbyists" for AARP by being "in tuned" with members requests and, on top of legislative action. In AARP, the established state organizational structure provides a base which provides unity among state level representatives and presents an image of security and organization to local federal counterparts. And where unity and understanding exist, structural integrity provides support to all other elements which may affect the success of the group.

**Federal Structure**

A third level where AARP's structure and stability may be assessed is on the federal level. Similar to the assessment of organizational activity on the local and state level, AARP's ability to structure and maintain unity within the group, as espoused by Key, may determine how effective the group is in pursuing and achieving its goals. "High quality leadership is an essential ingredient for the long-term success of a lobbying organization." Therefore, there may be diverse reasons for instability in a group.

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119*Ibid, pp. 31-45.*

120*Wilson, p. 84.*
organization like weak membership base or political environment nonresponsive to an organizational cause. However, Hrebenar concluded that "many other failures can be attributed to the crucial problem of inept leadership". The federal structure of the organization may serve as a cornerstone or barrier to the continued success of the other sectors of the organization.

AARP has a governing National Board of Directors supported by a six-member Executive Committee. The six members consist of four elected officers, the Chairman and Vice-Chairman of the Board. The National Advisory Committee, as earlier stated in AARP bylaws, serve to advise the Board of Directors. There are five National Advisory Committee: 1) Health and Long Term Care Coordinator, 2) Work Options; 3) Economic Security; 4) Volunteer Leadership Workshops, and 5) Education, Advocacy, and Community Service.

The positions of President, Vice-President, Secretary and Treasurer are national seats. These individuals are

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121 Hrebenar and Scott, p.10.
122 AARP'S Portfolio of Service: A profile of the community programs, services, and issues addressed by AARP., p. 16.
123 Ibid
selected from nominations and later chosen at the Association's biennial convention.\textsuperscript{125} The Association is staffed by over 1,600 employees in Washington (DC), Los Angeles, and nine other regional offices throughout the United States.\textsuperscript{126}

In addition to the leadership positions just stated, there are also national program coordinators, spokespersons, and representatives: 1) National Legislative Council (NLC)-is the principal unit which gathers insight from members at large and board members to establish AARP's positions on public policy; 2) Minority Affairs Spokesperson-serves as an outreach element and provides information to members and the Board regarding minorities as assets to the organization and assisting diverse needs of ethnic minority members (e.g. American-Indians, Asian-Pacific Islanders, African-Americans, and Hispanics); 3) Volunteer Spokesperson-promotes and stabilizes volunteer leaders in the organization and assist in the replacement of positions from those who relinquish such positions; 4) Women's Initiative Spokespersons-ensures that issues sensitive to women are not overlooked, 5) National Trainers-establish training guidelines and ensures that all eligible

\textsuperscript{125}Tassel and Meyer, p.17.

\textsuperscript{126}Ibid
members receive the training they desire on the local, state and national levels. 

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127 AARP's Portfolio of Service: A profile of the community programs, services, and issues addressed by AARP.
Chapter 4

ORGANIZATIONAL RESOURCES

The availability of organizational resources is an important factor to consider when assessing organizational structure. In Key's interest group model, resources were expressed as an internal antecedent factor which may affect the success of group activity. Resources are significant because without them, organizations have no foundation for influence and many will be bound for extension.\textsuperscript{128}

The resources available to AARP are many. Already discussed are AARP's massive membership of 35 million nationwide and its operating revenues, which in 1990 were estimated at $295 million.\textsuperscript{129} Additional resources which are important are group cohesion, membership skills and expertise, and organizational leadership.

Cohesion

Organizational cohesion is an antecedent in V. O. Key's model of interest groups in the political process. The most

\textsuperscript{128}Zisk, pp.7-8.

\textsuperscript{129}Tassel and Meyer, p.17.
essential benefit of a cohesive group, according to Key, is that a unified group may be more influential in comparison with the fragmented group and group members may find more security in the stability of the organization.\textsuperscript{130}

Luttbeg and Zeigler take Key's premise a bit further by adding that cohesion may be assessed in light of the relationship of the leader to his membership and the channel and frequency of communication. "In a voluntary organization, one of the prime requisites for this cohesion is the extent to which the membership is satisfied with the performance of leaders."\textsuperscript{131} According to Luttbeg and Zeigler, leaders may satisfy the wants of its membership in three ways: 1) unconsciously acting in accordance with the groups desires; 2) by being in tuned with membership, they may act independent of the group and still meet its needs or; 3) they may make a conscious effort, listen to the membership and act in accordance to their requests.\textsuperscript{132} No matter what approach is taken, Luttbeg and Zeigler appear to concur that where there are no mechanisms to retrieve member opinions, or where mechanisms exist, but are ineffective, communication will be weak and cohesion is

\textsuperscript{130}Zisks, p.7.
\textsuperscript{131}Hrebenar and Scott, p.9.
\textsuperscript{132}Ibid.
likely to fail.\textsuperscript{133}

An essential factor in determining membership opinion is through channels of communication. An assessment of membership satisfaction in voluntary interest groups, like AARP, is the ability to maintain active member participation in an organization with no monetary compensation. A test of AARP's understanding of this issue may be seen in the level of participation by its members at each level of the organizational structure i.e. local, state, and federal.

The needs of the members will most likely not be met if the organization has not thoroughly assessed members' interests and desires. An organization which has services which address the needs of its members will not only be in touch with the membership, it will also instill cohesion on every level of the organization. Members will not need to look outside of the organization for satisfaction if the organization is in touch with their needs.

\textbf{Local Level}

The cohesive properties of the AARP may be seen on the local level of the organizational structure. Subsequently, in as much as the stability of a structure is determined by its roots, AARP's cohesion may best be seen in the diverse

\textsuperscript{133}Ibid
facets and multiple duties performed by its volunteers throughout the local organizational structure.

Cohesion within the organizational structure is well defined on the local level of AARP. It is most clearly seen in the actions of community and special program volunteer specialists and the services they provide in supporting the organization.

Volunteer specialists serve in multiple areas by providing a diversity of services to association members and the general public. AARP chapters and affiliates serve foremost by promoting, educating, and by providing public participation in support of issues of the aged. As of January of 1994, AARP was supported by sixteen local volunteer specialists who have contributed their time, expertise, and talents to assist local AARP members and the community at large.134

The Cablevison Production Team member provides media support by producing a 30-minute cable program on AARP for the older adult and their families. A Chapter Organization Specialist assist the organization by developing new chapters which grow out of local steering committees.

Information Coordinators collect, maintain, and dispense

134AARP's Portfolio of Service: A profile of the community programs, services, and issues addressed by AARP. pp.33-35.
information to members and the community. Intergenerational Specialists promote issues of intergenerational concern like education, income security, and health care.\textsuperscript{135}

The Medical Decision Making Trainers assists members by providing options in the case of terminal illness and answer such questions as, "What is euthanasia and what are members legal rights if they become terminally ill?" The Member Inquires Specialists respond to inquiries from members on a national level who have questions regarding their privileges and rights as members of AARP. The Program Organizer Specialists assists chapters with training and technical assistance as needed, while the Recruiter Specialist and Resource Specialists performs duties according to their titles.\textsuperscript{136} An AARP representative is selected to sit on the Family Community Leadership Board to advocate relative joint AARP and family issues.\textsuperscript{137}

The Speakers Bureau has Chief and Coordinator Administers who administrate and operate community based speakers bureaus. The bureau members carry-out the actual presentations to AARP members, associates and the community

\textsuperscript{135}Ibid, pp.31-35.

\textsuperscript{136}Ibid

\textsuperscript{137}Ibid, p.34.
Like the Speakers Bureau, the Volunteer Specialists division has multiple players to accomplish an overall goal. The Volunteer Communications Specialists work with the Volunteer Communications Program (VCP) assisting AARP VCP participants with technical support (i.e. computers, data processing, and etc.).

The Volunteer Policies Specialist works with the Volunteer Coordination Specialist to publish and distribute materials relating to AARP volunteer policies. The final member attached to the volunteer office is the Volunteer Talent Bank Referral Specialist. This position is important because this individual has the auspicious responsibility of staying in-tuned to the membership to identify potential talent bank registrants who may address new issues which require their expertise.

AARP community and local based activity is not restricted to service provided by the specialists, just mentioned, who carryout AARP's image promotion and recruitment. Local volunteers also serve to respond to a multitude of issues, in many cases, of paramount concern to the aged and local communities at large. The 55

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138 Ibid
139 Ibid
140 Ibid
ALIVE/MATURE Driving program has instructors who work directly in the communities locating no-cost training facilities, publicizing and conducting driver safety for the mature driver.\textsuperscript{141} Instructor Training Specialist and Area Coordinators ensure that a structure and academically sound training program is accomplished.\textsuperscript{142}

The Guardianship Monitoring project works in conjunction with Probate Courts and AARP Legal Counsel for the Elderly training volunteer court visitors and auditors who may ensure that individuals placed under guardianship receive appropriate care and funds for support.\textsuperscript{143} In addition to court visitors and auditors, Records Researchers serve to ensure that court records are maintained and that guardians and wards may both be easily located.\textsuperscript{144}

The Health Advocacy Service (HAS) have Health Advocates and Coordinators. The advocates promote HAS programs, while coordinators serve as channels between community groups, AARP members and federal and state legislators.\textsuperscript{145}

\textsuperscript{141}Ibid

\textsuperscript{142}Ibid, p.36.

\textsuperscript{143}Ibid, 36.

\textsuperscript{144}Ibid

\textsuperscript{145}Ibid, p.37.
The Legal Hotline consist of three primary divisions: Attorney, Secretary, and Volunteer Links. The Attorney Hotline is the information centered source, working with volunteers secretaries who assess needs and direct calls, information, and referrals. These attorneys respond to inquiries or direct the aged to desired information or personal legal advice. Volunteer Links extend the services of the Legal Hotline by reaching out to elderly minorities and isolated individuals with no access to attorney advice or services.\textsuperscript{146}

Separate, but in conjunction with the Legal Hotline, are Legal Service Paralegals. Consisting of Volunteer Ombudsmen, Case Management Assistants and Senior Advocates, these individuals serve in diverse roles, inquiring about advocating the rights and delivery of services to older Americans in need. Their activities may range from transporting a person to the hospital for an appointment to resolving issues of inadequate care in a nursing facility.\textsuperscript{147}

The Money Management Program consist of Representative Payers, Bill Payers, Volunteer Coordinators, Monitors and Office Aides. Bill Payers assist individuals who unable to manage their funds and need assistance to maintain control;

\textsuperscript{146}Ibid, p.38.

\textsuperscript{147}Ibid, p.39.

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representative who assist by receiving government benefits on individuals behalf, actually carry-out all financial matters of members and beneficiaries. These two individuals are reviewed by monitors who ensure that all activities are conducted within program guidelines. Volunteer Coordinators work with AARP office aides and money management volunteers to recruit, retain and supervise volunteer project sites and activities.

The Tax Aide Program consists of coordinators, instructors, and counselors. Coordinators supervise community programs which serve the elderly by providing instructors who train counselors. Instructors are IRS certified in the delivery of tax assistance service which includes, but is not limited to, preparing tax returns.

The Widowed Persons Service is a program which has assigned local trainers, organizers, and coordinators who are sensitive to the needs of newly-widowed persons and which respond to the request of the elderly community and others concerned about the welfare of members at the time of their loss.

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148 Ibid
149 Ibid
150 Ibid
151 Ibid

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The Work Force Program has twelve specialists who promote the interest of the aged in the work force. They are the Employer Outreach Coordinator and Employer Outreach Volunteer, the Worker Equity Coordinator and Volunteers, the Work and Retirement Programs Coordinator, Employment Planning Trainers, Planning Delivery Volunteers, Retirement Planning Trainers, Planning Delivery Volunteers, and Work Force Volunteer Consultants.\textsuperscript{152}

The Employer Outreach Program, consisting of volunteer coordinators and members, educates and abdicates issues relative to age discrimination and pension awards.\textsuperscript{153} The Employment Planning Program consists of volunteers, trainers, team leaders and team members. These individuals fulfill their titles administratively and the team members carryout the duties for volunteer consultants evaluating employment programs in regard to job search avenues, unique community goals, resources and career advancement.\textsuperscript{154}

Retirement Planning Trainers and volunteers introduce and carryout the AARP "Think of Your Future" retirement planning program for employers and community

\textsuperscript{152}Ibid, p.41.

\textsuperscript{153}Ibid

\textsuperscript{154}Ibid
organizations. The Military Transition Planning Delivery Volunteers assist AARP military personnel in their transition from military active duty. Work Force Volunteer Consultants are a conglomeration of volunteers who respond to diverse and multi-specialty areas of AARP membership concerns and interests.

A few additional services provided on the local level are carried out under the title of Local Elderly Legal Counsel Projects. They are: 1) Home Visitors-Paralegal, 2) Information and Referral Assistant, 3) In House Volunteer Attorney, 4) Law Librarian, 5) Long-Term Ombudsmen Assistant, 6) Medical Bill Project Volunteer, 8) Paralegal and Pro Bono Attorneys, and 9) Volunteer Lawyers Project Paralegal.

**State and Federal**

Local offices are renown for their "hands-on", "front line" contact with the membership at large. Yet, AARP

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\(^{155}\)Ibid, p. 42.

\(^{156}\)Ibid, p. 42.

\(^{157}\)Ibid, p. 41.

\(^{158}\)Ibid, pp. 42-43.
state and national officials also perform duties which provide infrastructure to the organization. The cohesive properties existent in AARP state and federal areas are expressed in the title, description, and goals outlined for each state volunteer or staff member. For example, the 55 Alive/Mature Driving program theoretically consists of a State Coordinator who is supervised by an Area Coordinator.

In the duty description, it clearly states that the Area Coordinator will supervise the State Coordinator, Area Office Staff and Field Volunteers. The clear delineation of authority serves as a foundation to local offices which pattern themselves after the state offices to ensure structural integrity and consistency throughout the organization.

Cohesion is almost guaranteed because there is clarity and structure. And like other local government agencies which pattern themselves after the American system of government (i.e., division of powers) AARP has established its own structure, originating from the national office to be patterned by the state and local offices.

Under the guise of the Board of Directors, a National Advisory Committee, State Directors, and Regional Directors, AARP has strategically linked the structure of the

\[159\text{Ibid, pp.31-45.}\]
association. AARP presents itself as one of the most structured and efficiently run organizations in the United States today. It should not be surprising that they are able to maintain a body of professional volunteers who have supported and secured an annual budget which is one of the largest volunteer acquired funding base in the nation.

The most impressive factor existing in the state and federal duty descriptions is that those who hold these regional and national offices are mandated to support and serve members who serve the local membership and the general populous on the local levels of the organization. In so being, the original philosophy of Ethel Andrus Percy, "to serve, and not be served", is a standard and not just a belief.

**Leadership**

Leadership is another internal characteristic which may serve in determining if a interest group may be effective in pursuing and achieving its goals in the political process. Key stated that leadership qualities (i.e., skills, motives, and etc.) are essential to group characteristics because they serve as one of the antecedents affecting interest group activity.\(^{160}\)

Robert Salisbury expanded this view by adding that the

\(^{160}\)Zisk, pp.6-7.
"quality of leadership may determine if a group succeeds" or fails.\textsuperscript{161} No one has ever argued that a charismatic leader is "bad" for an organization; however, charisma alone has never proven to win any wars. Indeed, leadership traits, like all other characteristics of an organization should be diversified to respond to a diverse population with multiple needs. AARP's strength in leadership lies not only in the leadership skills held by individuals in positions of authority, but also in the diverse attributes of its leadership team at every level of the organization.

\textbf{State Leadership}

\textbf{Strength Through Diversity}

State leadership is essential in the organizational structure because state volunteers are in a prime position of seeing and hearing the desires of members within their state. However, they are still expected to promote the national office's intent which is handed down to them from the Executive Director to his national office, state offices, and etc.

According to Martin (Marty) D. Omato, the California State office Legislative Representative, "the California AARP is unique in a number of ways. First, the California

\textsuperscript{161}Wilson, p.64.
state office is the first in the nation to have a specialist, physically based in the state."¹⁶²

(Traditionally, all other legislative representatives were based in Washington, DC., at the national office.)

One motivation for placing a legislative representative, like Mr. Omato in California and using Sacramento as a pilot test, is due to California's diverse and high population areas. According to Mr. Omato, California currently has the highest population of AARP membership of the 50 states. In 1992, 3 million individuals residing in California's borders were 65+.¹⁶³ Mr. Omato continued by adding that, "the national office is currently considering placing legislative representatives in other locations, like California, with a large membership base".¹⁶⁴

For instance, Florida and New York both had over 2 million individuals who are 65+ in 1992, and other states such as Pennsylvania, Texas, Illinois, Ohio, Michigan, and New Jersey had populations over 1 million in 1992 as well.¹⁶⁵ California AARP continues as a pioneer in that it recently


¹⁶³Ibid

¹⁶⁴Ibid

¹⁶⁵Ibid
established additional state offices in Sacramento and Los Angeles. This is added evidence that AARP is an organization of structure, subsequently, the ability of the executive body to remain flexible to a changing society promotes internal strength as well.

Mr. Omato, a Japanese-American, has a significant role in the state organization. He is a paid staff member who serves to provide staff support by providing counseling and resource information to the State Legislative Committee. His resources allow AARP state leadership to make informed decisions. The highest ranking official who he personally assists is the State Director-Lavanda DeSalles.

The State Director, Lavanda DeSalles, is an African-American female. She is the highest ranking official in the state organizational structure. Mrs. DeSalles is a state representative who implements and motivates effective change on the state level. In the California Leadership Council; Update, Mrs. DeSalles spoke of substate regional conferences in California which would "target" national and local members for inclusion. The goal is to assist individuals

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166 Ibid

in being "aware of AARP's national goals". Mrs. DeSalles praises her Associate Directors for a job well done. These individuals supervised events which promoted AARP programs and services in the community.

Another significant role player in state AARP activity is Winston Smith, an African-American male who serves as the State Legislative Committee representative in Washington, DC on the AARP Advisor Panel. The panel is important to members because it is the body which makes recommendations which are traditionally followed by state and local offices.

AARP presents a convincing image of an organization which is aware of our ever changing social trends. In addition, it appears that its executive administrators are not afraid of expressing a reflective image of cultural diversity within its organizational body. Marty D. Omato, Lavanda DeSalles, and Winston Smith are just a few examples of AARP's commitment to cultural diversity and group inclusion. The most committed inclusion would entail all aspects of a diverse society and social fabric (i.e. age, ethnicity, sex, geographic region, and etc.); however, AARP's attempt to promote an appreciation for diversity

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Ibid
Ibid
Ibid

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through ethnicity and geography are an admirable start.

AARP's testament of inclusion continues as an expression in the diverse make-up of the members of the State Leadership Council: Armida Belt-State Coordinator, AARP/VOTE; Marian Freilingher-Community Coordinator; Betty London-State Coordinator of HAS; Pati Long-Spokesperson for Women's Initiative; Al Moody-Assistant State Coordinator of 55 ALIVE/Mature Driving Program; Yvonne Mitchell-State Training Coordinator Retired Teachers Association; Doris Prince-State Training Coordinators; Robert Morris-District Director, local level.¹⁷¹

It is AARP's foresight in promoting inclusion has produced internal cohesion. John Locke, the political theorist, placed great credence in the belief that an individual who owned his land of residential occupancy, found purpose and worth in his life's existence. It should not be conclusively deduced that AARP executives had the forethought of promoting an organization of diverse individuals (i.e. sex, ethnicity, geography, and etc.) with the goal of promoting the premise of ownership as espoused by Locke. Yet, the executive members who are most involved in the organization are those who are not afraid of taking the lead. These members have made a personal commitment to

¹⁷¹Ibid
the organization which precludes opposition to executive decisions and enforces their desire to influence AARP policy, overall. In the end, cohesion is built from AARP's external organizational structure and soundness and is maintained through its internal factor of inclusion, accomplished through a sensitivity to a diverse society.

**Federal Leadership**

AARP maintains structure and stability because continuity and endurance have been a leadership trait on the executive level of the organization since its origination. The structural designers and architects of the organization have been six individuals. AARP has experienced diverse leadership styles over the last 48 years; however, each director has brought with him unique skills and talents which have served as mortar in the building blocks of AARP's organizational structure.

Two examples of the type of executive leadership which has served the organization are Bernard Nash and Cyrill Brickfield. Mr. Nash, in the 1970's, was seen as a specialist in the field of aging.\(^ {172}\) He entered his post with AARP just prior to his departure from his position as Deputy Commissioner on Aging; he is noted for his role in

\(^ {172}\)Tassel and Meyer, pp.16-17.
the Foster Grandparents Program. Cyril F. Brickfield was formerly Deputy Director of the United States Veteran Administration; ten years prior, he was counsel to the House of Representatives on the Judiciary.

There have been three other executive directors since AARP's inception. Horace Deets has held the Executive Director seat from 1987 to the present, prior to Mr. Deets were the following: Cy Brickfield and the founder, Ethel Percy Andrus 1947-1967.

It was Mrs. Andrus who decided, in her term as Executive Director, to establish in the organization's bylaws, vested control of AARP Board of Directors. This was another example of AARP providing its own system of checks and balances. The current Board of Directors are the following: Chair-Robert Shreve and Merle Wilson; Members-(Class of 1998): Helen Boosalis, Allan Buckingham, Esther Canja, Bernice Shepard, and Howard Shumway; Members-(Class of 2000): John Lione, Ann Miller, Jan Panb, Marie Sonderman, and Allan Tull.

Dr. Andrus also established policy to ensure local

\(^{173}\) Ibid

\(^{174}\) Ibid

\(^{175}\) Ibid, p.16

\(^{176}\) "Modern Maturity" Magazine, p.2
level involvement in national organization decision making. To ensure participation, Dr. Andrus mandated that local Chapter representation was consistent at all biennial conventions and that an "orderly succession of leadership" occurred. The position of honorary President was instituted under these bylaws. The first three honorary presidents were Leonard Davis (the businessman who assisted Mrs. Andrus in the founding of the organization) Ruth Lana and George Schluderbers (a former Maryland high school teacher). The position of president has been held by teachers and businessmen alike, all of whom brought unique perspectives to the organization.

The current leadership has a new face and a new direction. The current president and his members consist of: President-Eugene Lehrman, President-elect-Margaret Dixon, Vice President-Joseph Perkins, Immediate past President-Lovola Burgess, Secretary-Beatrice Braun, and Treasurer-C. Keith Campbell. An added change in the leadership dimension is the formation of regional directors. Each director is assigned by regional designation:

Northeast-David Rogowsky, Southeast-Bette Severyn, Midwest-

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177 Tassel and Meyer, p.17.
178 Ibid
179 "Modern Maturity", p.2.
Successful leadership on the national level is evidenced through state and local community activities. As earlier mentioned by Ted Andersen (Glendale, California-District Director) and Marty Omato, (California State Legislative Specialist), AARP executives are taking AARP into a new direction. These changes relate to the break from what was once a traditional structure of the organization to what is now a new approach to membership participation and organizational control. According to Mr. Andersen and Mr. Omato, the national office now, more than ever, realizes that community volunteers are the central element essential to the organization.

To ensure that local offices receive the support they need to serve in the manner the new administration envisions, the President, Mr. Lehrman, established five regional offices which will be supported by twenty-one staffed field offices. He also formed a Volunteer Structure Committee to assist in the effort. These individuals will represent AARP volunteers nationwide and define the changing role of volunteers under a new "Local

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180Ibid

181"California Leadership Council" Update, p.4.
Because local offices are essential to the success of the "local level" structure, AARP Board of Directors has established a plan which will provide direction to local offices. The elements of the plan are stated in a prospective view of what the Board, and President believe AARP should promote: "1) A strong presence in the community; 2) A unified and visible presence on state and community issues; 3) Adequate resources (dollars, people, and technology) to support this presence; 4) More diversity and; 5) The capacity and commitment to serve all generations."  

The national leadership of AARP is successful because it fosters inclusion, diversity, education and commitment to its membership. Like the organization's founder, Ethel Percy Andrus, AARP appears to be one of the few organizations in America today which is not afraid of being a pioneer. The organization's aggressiveness in embracing social change and diversity is a credit to AARP. This credit is appropriate in light of America's tainted social condition.

Consider a society like ours in which the "Tailhook" scandal of the Navy has made America question the ethics of

\[182\] Ibid
\[183\] Ibid
its highest ranking Naval officers and their treatment of woman. Another case is that of Rodney King in which African-American citizens of Los Angeles lost faith in police officers sworn to protect and defend. And yet, a final example still pending, are questions regarding President Clinton and his role in legitimate or illegitimate business dealings to achieve, what some have proposed, his national office. (Los Angeles Times, 1995)

AARP leadership may fall short in accomplishing the goals of service and commitment to the communities they serve. However, they must be applauded for their persistence in promoting positive social change in light of current political and social conditions.
CHAPTER 5

POLITICAL INFLUENCE

The political influence of AARP has been notably seen in the historic evolution of the organization, and it is still being experienced today. AARP, at its inception, made many allies; however, the organization's position on diverse types of public policy have also created adversaries. Friends and foes alike have been present on each level of policy formation and social action throughout AARP's history of activism on all levels of government (i.e. local, state, and federal).184

AARP grew out of the National Retired Teacher's Association (NRTA). Dr. Ethel Percy Andrus first real encounter with the complexity of public policy making came out of her challenges from a state legislature while she fought for pension reform and again in a battle with Congress in which she fought for tax benefits for retired teachers.185

Dr. Andrus knew that the concern on the forefront of

184Tassel and Meyer, p.17.
185Ibid
most retirees' minds was what to do in case of an accident or injury? The question was important because during that period insurance companies in America were not offering insurance to individuals 65 years of age and above. The next group of individuals Dr. Andrus targeted was in the private sector, namely the insurance companies.

**Private and Public Sector Influence**

Robert Decormier, while president of NRTA, persuaded Leonard Davis, a Continental Casualty Company agent, to get insurance coverage for New York retired teachers. Continental first agreed to underwrite 800 New York state retired teachers on a trial basis.\(^{186}\) The program was a success and Dr. Andrus met with Leonard Davis, a Continental Casualty Company agent. The program was a success and Dr. Andrus met with Leonard Davis and informed him that she wanted the same coverage for NRTA members.

Within the first six weeks of the enrollment period, the result of their collaborated effort brought 5000 new applications from NRTA members applying for health insurance coverage.\(^{187}\) Dr. Andrus later formed an agreement with

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\(^{186}\)Ibid

\(^{187}\)Ibid
Leonard Davis and Associates (later known as Colonial Penn Group) to provide counsel and advice to AARP members in financial matters as needed.\textsuperscript{188}

Dr. Andrus continued to impress her philosophy upon others, "to serve and not be served" as she introduced valuable new services to members. AARP broadened its base of services to its members by introducing three primary benefits: group health insurance; travel services; and pharmacy services. Members of the electorate who were supportive of AARP were the following: Senator Estes Kefauver of Tennessee, who was the chairman of a Senate committee on antitrust and monopoly looking into the high costs of drugs; and others like Representative Melvin Laird, Senator Harrison Williams, Senator John F. Kennedy, Representative John E. Fogarty, and others.\textsuperscript{189} The primary adversaries were the pharmaceutical lobbies.

AARP continued to forge ahead, developing and re-defining appropriate access to goods and services to its members. AARP had prided itself for being a nonpartisan organization and the contributions and special insight this organization expressed in their social activism in support of rights of the aged population continued to be

\textsuperscript{188}Ibid

\textsuperscript{189}Ibid, pp.20-21.
acknowledged and supported by government and private agencies alike.

In a collaborated effort with Douglas Fir Plywood Association, AARP co-sponsored the designing of a model home for older residents. Dr. Andrus presented the keys to the home, the House of Freedom, to President Dwight D. Eisenhower on January 11, 1961. In August of 1962, AARP was invited and took part in a conference hosted by the New York World's Fair Executive Committee and seven different federal agencies to discuss issues of aging and retirement.

In the years that followed, AARP continuously received requests by diverse government entities to direct the organization's efforts toward grant requests and project proposals, to address the diverse needs of the aging population. Before long, over $1 million in grants were awarded to AARP for select projects like Late Start (in four cities), Project Mainstream (in seven cities), and Project WORK (in Long Beach).
Academic Contributions

AARP's influence and impact has also been extended to secondary education in private institutions in California. AARP/NRTA contributed $2 million for the building of Andrus Gerontology Center at the University of Southern California, Los Angeles. The building was dedicated on February 12, 1973 and the establishment of the Andrus Foundation was formed. The Foundation has promoted research in gerontology and related fields, and research at schools like Brandeis, Duke and Wayne State Universities. Today, the Andrus Center houses the first undergraduate School of Gerontology and the Andrus Gerontology library.

AARP continues to serve on diverse local, state, and federal panels, bringing knowledge and education to each sector of government on issues of retirement planning. AARP received requests from the public sector. Some of the companies and institutions requested guidance on retirement planning programs. They were: Dow Chemical Company, Fisher-Price Toys, Westinghouse Electric Corp., University of Missouri, Pan Am World Airways, Shell Oil Co., Gerber Baby Food Products, and many, many, more.

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195 Ibid
AARP has historically played a significant role in the interaction between public and private sector entities and their concern in responding to the needs of an aging population. AARP continues to perform a significant service to its members and the public at large, as it gathers information and develops proposals regarding public policy affecting the aged.
CHAPTER 6

PUBLIC POLICY MAKING

POTENTIAL IMPACTS

The most notable role AARP has performed in its potential for policy formation has been expressed in its longevity and massive membership size, and yet, its existence would have little significance without some expressed participation in the social-political structure. Therefore, an assessment of AARP's role in health care policy will be assessed under V. O. Key's Interest Group framework.

As stated earlier in this analysis; the three elements of V. O. Keys, Interest Group framework are: 1) Political Interest groups "can act as a major link between the citizen and her government"; 2) Political Interest groups can "orient" the lone individual to a highly complex society." In assessing AARP's involvement in health care policy, consideration shall be given to three questions proposed by Key: 1) What factors shape the values, structure, and activities of AARP; 2) How does AARP go about achieving its

\[\text{Zisk, pp.6-7.}\]

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aims? and 3) What impact has AARP had on the acts and attitudes of individual citizens and policy makers?\textsuperscript{198} The factors and elements affecting these questions are: "group characteristics, alternative sources of influence, the targets of influence, the legal structure, the general environment, and the interactions between the group and others (especially the target population).\textsuperscript{199} In assessing AARP and health care, the first question to be addressed is the factors which have shaped the values, structure and activities of AARP in regards to health care policy?

**Potential Group Influence**

AARP is the leading organization in America representing the interest of over 33 million individuals who are 50 years of age and older. The characteristics which make this group unique and influential to the potential direction of health care in America is its membership body and ready pool of professional volunteers. These 33+ million members have the potential to disseminate information to the population at large and amass political action through its pre-existent organizational structure, at the federal, state, and local levels.

\textsuperscript{198}Ibid

\textsuperscript{199}Ibid
AARP has an organization structure consisting of a national executive who interfaces with a board of directors. The board of directors takes part in Congressional hearings to gather information on national policy. The board meets with AARP specialist in the organization public policy institute to assess, condense and structure AARP public policy agendas to present to its membership. Members rely on information provided by AARP to make informed decisions about every aspect of life. At the close of 1996, AAAP will have established five regional offices which will support 21 staffed field offices, to serve 23 states.

Each state now has a state office consisting of legislative and program specialists who provides support to local chapters. Chapters consist of AARP professional and nonprofessional volunteers, some whom serve administrators, and others who are specialists in reaching out to aged individuals in the community. Volunteers provide education and support services needed by members in the community.

Each element of AARP is linked to form a base of support for AARP members and their communities. AARP's internal characteristics of structure and longevity make it an attractive organization to non-members and a strong ally for members.

There are a number of external and alternative sources
influencing the existence, structure, and activities of the AARP. A primary reason for the existence of AARP and its political activity is to answer the question raised by Dr. Andrus, the AARP founder, and AARP members alike: "Who is responsible for the development of public policy for the elderly?"

Public policy is formed not only by government entities, (i.e. federal, state, municipal), but also by mechanisms controlled by private industry and public opinion. A second factor influencing the activities and existence of AARP is the American perception of the aged in our culture.

The American society is one which is in love with youthfulness and all things associated with being young. This point is reinforced in the mass media through diverse forms of advertisement. Another extreme of those who love youthfulness is those who dislike, and sometimes hate, the aged and the state of growing old. In the 1990's the current generation has become known as the "me" culture. There is not much talk of reaching back, or forward, to assist generations pass or present. "Indifference towards the aged, in part persists because of the emphasis in American culture on individualism and independence."200

200Levin, p.10.
AARP has a response to the question of who will form policy for the aged. AARP promotes the belief that it has existed to ensure that those who are the recipients of AARP political policy influence are heard before they are forgotten. A journalist known as "JB" for the Southern California Senior Life Journal (July 1995) stated that: "But it (AARP) is by far the largest and most powerful senior organization... Destroy AARP and you've a strong defender of Social Security". JB is correct in his understanding that AARP is a significant player in the public policy arena. AARP is anchor in public policy formation because of its longevity and tenacity to exist in a society, which has followed everchanging trends with little consistency.

AARP's mainstay has been its ability to establish goals sensitive to seniors, and maintain a course of action which is beneficial to its members. The action AARP established to adhere to was stated in a goal in which health care reform was proactive and not reactive. In addition, political involvement has been promoted to effect public policy formation with pre-established goals.

Ethel Andrus Percy established the AARP and its predecessor, the National Retired Teachers Association, (NRTA), because in 1947, teachers' pensions were substandard and health care coverage was nonexistent. When AARP sprang
into existence in 1958, members, for a small fee, gained access to group health insurance. Therefore, it was not surprising that not long after, in the early 1960's, Dr. Andrus submitted a proposal to Congress as an alternative to its Medicare plan. She asked that Congress consider a voluntary health insurance plan providing more coverage to aged individuals. Although her proposal was not accepted, she and the organization still supported the passage of Medicare in 1965.

The Development of Medicare

Although Medicare and Medicaid were concurrently enacted by the Johnson Administration 30 years ago, there has remained an inability by Congress to define and efficiently administer these programs. "The inability of Congress to resolve the welfare and entitlement questions is reflected in the administration of Medicare as an entitlement through Social Security, and Medicaid as a welfare program". And because both programs are delivered by physicians who understand that each program has a limited expenditure of costs for services, the result is

that the elderly population tend not to receive the treatment they need by physicians.\textsuperscript{203} Listening to the concerns of its members and legislative specialists, AARP continued its march toward health care reform.

AARP has remained in the forefront of healthcare reform throughout the 1960's and well into the 21st century. In the latter part of 1970, AARP actively supported Senator Edward Kennedy's (Massachusetts) national health insurance proposal.\textsuperscript{204} The next health care issue facing AARP was that of long-term care.

In 1978, the Older Americans Act was amended. The amendments mandated that each state establish a long-term care ombudsman program.\textsuperscript{205} In 1985, only 22 states guaranteed the ombudsman access to nursing homes.\textsuperscript{206} Under the Carter Administration, the Secretary of the Department of Health, Education and Welfare, Patricia Harris, guaranteed ombudsmen 24 hour access to nursing homes; subsequently, the same regulations were withdrawn under the Reagan Administration.\textsuperscript{207} National public policy or lack

\begin{itemize}
  \item \textsuperscript{203}Ibid
  \item \textsuperscript{204}Ibid, p.58.
  \item \textsuperscript{205}Ibid, p.62.
  \item \textsuperscript{206}Ibid
  \item \textsuperscript{207}Summary of the AARP Public Policy Agenda-1995, pp.57-62.
\end{itemize}
thereof, was an added factor which persuaded AARP to become more involved in the issue of long-term care, the primary factor was the consequence of no action.

In AARP's "1995 Facts & Legislative Priorities", established by the California State Legislative Committee, healthcare reform became as the first legislative objective. The first priority of the 1995 California Legislative Program was expressed in AARP's goal statement to "secure a universal, comprehensive health care system that provides affordable, quality, acute and long-term care for all, and which includes preventive and curative home, community, and institutional services, including prescription drugs and mental health."\(^6\)

For the million of Americans who fail to plan for retirement, there are probably just as many who do not believe they will spend the last months of life in a nursing facility. In 1985, for those Americans who were over 65, there was a 20-40% chance that they would enter a nursing home, most would die there.\(^9\) Of those individuals which are fortunate enough to have a living spouse, 10% of them would need to "divest themselves of all but $2000" so that

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\(^{9}\) Levin, p.10.
their spouse, requiring long-term care, could qualify for Medicaid.\textsuperscript{210}

In light of the absence of public policy supporting long-term care, AARP most recently established the issue of long-term healthcare as a priority in the organization's legislative objectives. In the AARP 1991 pamphlet, "Health Care Reform. The Time is Now!", the association lists ten principles of long-term care which are essential if health care reform is to occur.

1. Long-term care services should be available to all people who need them, regardless of age or income; 2) a national long-term care program should provide a comprehensive range of services. These services should include: 1) in-home assistance; 2) community services; 3) long term care services in a full range of supportive housing opinions; 4) institutional care; and 5) rehabilitative services.; 3) The new public program should assist not replace current informal caregivers.; 4) Implementation of the public program must be phased-in to ensure orderly development of the new system; 5) The principles of social insurance (e.g. Social Security or Medicare), and shared risk must be extended to long-term care; 6) The new long-term care program should be financed primarily through taxes earmarked to a trust fund; 7) The new public program must provide a solid foundation for protection, upon which the private sector can build; 8) reasonable and provide financial returns to providers who deliver quality care; 9) Cost containment mechanisms must be built into the new long-term care system; and 10) The federal and state governments should assure delivery of quality care under the new long term program.

The issue of long-term care has not been afforded the opportunity to gain independent assessment. Today, most of

\textsuperscript{210}Ibid

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the policy proposals regarding long-term care are attached to other entitlement requests. The result is that long-term care is set aside for further investigation, while some other issue which may be even more significant to the aged population, (i.e. Medicare), controls the direction of policy discussion.

When AARP had attempted to take the lead in expressing the serious need for government sponsored long-term care, or similar services like catastrophic care, the organization received criticism from government entities and some AARP members alike. For example, AARP supported the Medicare Catastrophic Act of 1988 which contained many benefits, one of which was outpatient prescription drugs. Some criticism of AARP came from members in regard to financing that much of the cost to cover the program would not be equally dispersed. Practically, every segment of the Catastrophic Coverage Act was repealed by Congress in 1989, (except a few provisions for nursing home residents) which would prevent spouses from becoming indigent while their loved one received needed care.21

State Policy

In California, the AARP State Legislative Committee

published a 1993 Position Paper called "Health and Long Term Care". The paper proposed that "health and long-term care services are a major responsibility of the state of California." The position paper determined that the state has a responsibility to effectively manage and oversee health and long-term care programs and cost containment for these needed services. The California AARP indicated that its Legislative Committee would "promote legislation and administrative action" which would benefit all individuals in the following areas:

1) affordable, available access to all necessary health services...; 2) comprehensive health care reform programs which provide both acute and long term care services with financing based predominantly on social insurance principles.; 3) improvement in the quality of home and community-based long term care and mental health care services; 4) ensure that care provides and practitioners deliver quality services; 5) allow a free choice of providers.; 6) assistance in making prescription drugs affordable to all.; and 7) require uniform reporting, billing and use of healthcare statistical data in evaluation health care programs and delivery.

When the California legislature adjourned on August 31, 1994, two health care reform bills lay on the desks of Joint Conference Committee members; the bills were HB 16, sponsored by Representative Bert Mangolin and SB 1098,
sponsored by Senator Art Torres. Both bills were drafted by Democrats. The elements of the plan entailed the creation of a Health Plan Commission to supervise a plan for universal coverage.

The greatest benefit of the bills is that California residents would receive coverage and benefits equivalent to the comprehensive health care services established under the Clinton plan. After the legislators reconvened in January, a body of interest groups planned to gather 700,000 signatures which would support the California Health Security Act and allow for the plan to be formalized and voted on as a 1994 ballot initiative. The result of these efforts is that the house and senate bills died in chambers, however, the California Health Security Act did become a 1994 ballot initiative.

The California Journal, a non-partisan report on politics and issues, published "A California Journal Analysis: November 1994 Ballot Propositions". In the report, Proposition 186, (referred to as Prop 186), is

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213 Ibid
214 Ibid
evaluated. The report indicates that Prop 186 was preceded by diverse policies and supporters. In 1992, the former Insurance Commissioner, John Garamendi, developed a universal coverage plan which was proceeded only by the California Medical Association's (CMA) initiative on employer mandated coverage.\textsuperscript{215}

The Garamendi plan survived, passing both houses, and Senator Petris authored a bill similar to the Commissioner's. The CMA's initiative failed, Governor Pete Wilson vetoed Garamendi's universal coverage plan, and the Petris bill did not survive the Senate.\textsuperscript{216}

In November of 1994, prior to Prop 186 being placed on the ballots, a report estimated that 6 out of 32 million residents in California did not have any health insurance, were not eligible for Medi-cal or Medicare, and most relied on emergency rooms or received no care at all.

The California Health Security Act, better know as Prop 186 "was designed by a group of private physicians who believed that "private and especially for profit insurers were a major part of California's health care problem".\textsuperscript{217}

\textsuperscript{215}Ibid
\textsuperscript{216}Ibid
Proposition 186 would call for a "single payer" system in which the state of California, under an elected Health Commissioner, would administer and finance health benefits for all residents. Within the plan, residents would receive medical, dental, vision, mental health and long-term care.\textsuperscript{218} The measure would be financed by increased income taxes and it would also grant the Legislature discretion to redirect funds from government-funded medical services for low income residents.\textsuperscript{219}

There were many supporters and opponents of Prop 186. Most of the supporters were public interest and public service groups which included the Physician's Alliance, Health Access, the California Congress of Seniors, the League of Women Voters, the American Nursing Association, and national and international organizations like the American Association for Retired Persons (AARP) and the California Teachers and Service Employees International Union.\textsuperscript{220} Most of the opposition groups were from the private sector, and included the following: the California Association of HMO's, the National Federation of Independent Businesses, the Organization of Nurse Executives, the

\textsuperscript{218}Ibid
\textsuperscript{219}Ibid
\textsuperscript{220}Ibid
California Tax Payers Association, and Governor Pete Wilson.\textsuperscript{221}

Supporters of the measure stated that the primary benefit is cost control. There is a need for containment because private and for-profit health care providers have caused health care costs to escalate; also under this policy, the state can "eliminate unnecessary care" and direct funds to resident who most need it.\textsuperscript{222}

In AARP's "Highlights" newsletter, AARP President Eugene Lehrman stated that,

The goals AARP has established are designed to create a health care plan that will provide for the American people: 1) Guaranteed health coverage, on a timetable specified by law; 2) A specific packet of benefits including: long-term care for persons of all ages with severe disabilities and chronic illnesses, and prescription drug coverage; 3) System-wide cost containment that makes healthcare affordable for consumers while assuming physicians and hospitals fair reimbursement for their services; 4) Protection and strengthening of Medicare; and 5) Financing that is fair and adequate".\textsuperscript{223}

Opponents of Prop 186 say the measure is too costly and would destroy the California economy by bankrupting some

\begin{footnotesize}
\textsuperscript{221}Ibid
\textsuperscript{222}Ibid
\end{footnotesize}
small businesses and driving other businesses away. In addition, these individuals believe a single payer system would eliminate 300,000 jobs and the proposed cost measures could not support the "generous" benefits offered through the plan. As stated in the California Chamber of Commerce newsletter, "Alert", chamber members stated that to fund Prop 186, the state of California would have to increase "taxes on business and individuals by $40 billion a year". The largest tax increase in California history.

In a later edition of the "Alert" the newsletter presented a breakdown of what it believed the tax burden would be, should Prop 186 become ratified. "If Prop 186 is enacted, taxes would significantly increase: 1) Business taxes would increase from $4.9 billion; 2) Cigarette taxes would increase from $0.6 billion to $1.9 billion; and 3) Income taxes would increase from $18.4 billion to $29.3 billion."

On election day, November 7, 1994, Proposition 186 was


\[225\] Ibid


\[227\] Ibid
defeated by a vote of 73.4% to 26.6%. Opponents of the measure say Prop 186 failed because California residents measured the costs against the benefits.

The current condition is that 6 million, out of the 32 million California residents still do not have healthcare. These individuals will continue to rely on emergency room care or other public health facilities for immediate care, and many will receive not care at all. Subsequently, in light of the current economic crisis in southern California, e.g., Los Angeles and Orange Counties, those health care facilities which once provided emergency care are now closing their doors. Future prospects of health care for the low-income and indigent populations in California is currently unpredictable, at best. A final assessment of AARP in health care reform shall address the impact of the recent budget cuts to Medicare and Medicaid.

**Federal Policy Involvement**

The current Republican controlled House and Senate have recently successfully accomplished a promise in respect to their "Contract with America". On October 1, 1995, Medicare

\footnote{224}{"Alert" (Sacramento: California Chamber of Commerce, November 18, 1994), p.1.}

\footnote{225}{Ibid}
and Medicaid were directly hit by severe budget cuts and continued cuts are said to roll forth up into the year 2002.\textsuperscript{230} Prior to the approved cuts, AARP and other organizations, concerned with the rights of the elderly, fought the initiative.

AARP's involvement in the Medicare debate occurred concurrently as it proposed other avenues of health care reform. In the October 1994 AARP "Bulletin", members were informed that they must remain vigilant in the healthcare reform debate because the cost of Medicare was about to increase, while the delivery of services would diminish. According to Health and Human Services (HHS) Secretary, Donna E. Shalala, "Without reform that holds down costs...people 65 and over-and everyone else-can forget about new prescription drug benefits and a start on long-term care assistance. People will face higher costs in healthcare and Medicaid, which already is expected to become solvent by 2001, unless Congress acts."\textsuperscript{231}

Another issue about which AARP attempted to educate its members, and the public, is government mismanagement. In AARP's \textit{Modern Maturity} magazine, a professor at Temple


\textsuperscript{231}"Highlights", (October, 1994), p.7.
University introduced a different perspective on the cause of the health care cost crisis. According to Thomas E. Getzen, Ph.D., professor of health administration at Temple School of Business, "a hopelessly bureaucratic insurance system, lack of centralized budget control, and fragmentation of the health profession' are the real cause of rising health care costs". Dr. Getzen concluded that as long as societies elect to depict an "illustration of necessity" in which they promote the image that health care costs are due to "aging, and other external forces, they don't' have to take responsibility for fixing the problem".\textsuperscript{232}

Getzen's theory, that mismanagement was the cause of rising healthcare, was emphasized when a federal agency, the Health Finance Administration (HCFA) failed to carry out its duties.

The Health Care Finance Administration (HCFA) is the federal agency responsible for the supervision and administration of major government programs like Medicare and Medicaid. This agency was recently noted as having some administrative problems of its own in respect to payment procedures and cost comparisons regarding new technology. "HCFA's procedures have been weak in the area of monitoring .

\textsuperscript{232}Modern Maturity, p.3.
of price charges for goods or services. For example, Medicare paid between $144 to $211 for human blood glucose monitors when drug stores were actually selling them for almost $50".233

A second case arose in which HCFA has failed in the area of new technologies. According to Jonathan Ratner, the Associate Director of Health Finance and Policy Issues in the Government Accounting Office (GAO), "HCFA does not systematically review payment rates as technologies mature, and as providers cost per service decline, HCFA's payment rate remains locked in the older and higher market rate".234

The greatest cost of the lack of government oversight is that because there is a failure to monitor services, it has become easy for "a provider of health services to obtain a Medicare number, present their bills, collect their money, and disappear".235 And although the Inspector General's office reported having increased administrative sanctions against abuses by 300% in fiscal year 1994, due to the current budget cuts, her staff was reduced by 17 offices and fraudulent behavior will be even more difficult to

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234Ibid
235Ibid
The proposed budget cuts established by Congress in November of 1995 proposed that Medicare be cut by $270 billion and Medicaid be cut by $182 billion by the year of 2002. These cuts are significant to Medicare recipients because the services which have now been mismanaged, and the health care providers which have denied care to these individuals, because they are Medicare recipients, is about to escalate. According to the United States House Committee of Ways and Means 1993 report, there are projections that at the conclusion of 1995, there would be 36,251,000 recipients of Medicare. Thirty-three million of these individuals are AARP members and elderly citizens living in states across the nation.

\[^{236}\text{Ibid}\]
\[^{237}\text{Ibid}\]
\[^{238}\text{Ibid}\]
CHAPTER 7

CONCLUSION

I began this discussion proposing that AARP is an interest group, as defined by Bentley and Truman, joined by common interests, with the potential to influence public policy formation and direction. Through V. O. Key's interest group model, it was seen that AARP is an organization which has a clear and defined organizational structure which serves as an external antecedent to the potential longevity of the organization. In addition, AARP's unique internal antecedents consisting of group size, economic base, membership diversity, organizational longevity and professional volunteer pool are factors which have influenced, what Key calls "outputs" of the interest group model.

At its inception, AARP, and Ethel Percy Andrus set out to educate and influence policy effecting the aged population. Since the establishment of the organization, AARP has created an avenue of political expression to challenge a system which, prior to AARP, did not believe medical insurance for the elderly should be instituted. In
as much as AARP paved the road for medical insurance for individuals 50+, when there was none, AARP continues to fill the void of information which is lacking in some policy making arenas.

The issues currently being advocated by AARP are issues that are also before Congress, they are: Medicare, Social Security (allocation and maintenance), Tax Reform, and Long-Term Care. Although it would be erroneous to deduce that AARP has definitely caused policy makers to act or cease to act, I do believe it may concluded that AARP has served as an essential participant which has served its members, and society well, by educating us about the diverse issues relative to the elderly and the possible impact of our actions, be they committed or omitted. In addition, although AARP still stands firm as a non-partisan organization, its 33+ million membership can potentially influence the re-election of politicians and the ratification of policy by taking action at the ballot box.

It is in light of AARP's continued role as social educator and its capacity to become a political powerhouse, should it choose to amass its membership, that I believe that AARP has the potential to influence public policy making in the upcoming national election and state and municipal elections alike. The true test of its impact has
not yet been realized, however, as the 21st Century receives an America which continues to age dramatically, AARP will become a leader in the interest group sector of policy direction and formation.

AARP has proven to be an enduring organization. As it approaches its 50th anniversary, it must confront a number of issues. A primary issue is how to assist the million of AARP members who may be devastated by the proposed federal cuts to Medicare and Medicaid. Another issue is, in light of its inclusive philosophy and the local member empowerment, what issues will take precedence when a local chapter has a concern it believes is significant and national has a standing policy of abstention (e.g. police brutality). A final issue is the role of AARP in the future of policy making. Now that many of its members have lost part of their base, (Medicare/Medicaid); will AARP need to restructure its approach to influencing public policy and find new avenues of financial assistance to its members?

AARP has been and continues to be an interest group which has influenced, and at times, shaped opinions which influence policy formation. Because the American society continues to grow older daily, as fewer children are born and adults continue to live longer, the aged population will grow. As the aged population grows, so will the membership
rolls of AARP. And as individuals find that there is no other resource or entity committed to the concerns of the aged and the future of the country, AARP will become more influential in policy making and will affect the direction of public policy formation in a fashion that has never been imagined.
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