COURSE NUMBER: SOWO 830

COURSE TITLE, SEMESTER, AND YEAR: Health and Mental Health Policy
Spring 2008

MEETING TIME: Mondays, 2:00 – 4:50

INSTRUCTOR: Laurie Selz Campbell, MS, CPRP
202A Tate Turner Kuralt Bldg.
Phone: 843-6394
Fax: 843-6398
lauriesc@unc.edu

TEACHING ASSISTANT: Jennie Vaughn, MSW
324F Tate Turner Kuralt Bldg.
Phone: 962-8352
jsvaughn@email.unc.edu

OFFICE HOURS: Laurie: Mondays 12:30 – 1:30 and by appointment
Jennie: Mondays 12:15 – 1:15 and by appointment

COURSE DESCRIPTION:
Examines national and state health/mental health policy, focusing on historical, legal, socio-political, and economic factors influencing financing, access, and service delivery. Explores skills/strategies for policy analysis and change.

COURSE OBJECTIVES:
The student who successfully completes this course should be able to demonstrate understanding of the following issues in regard to health, mental health, developmental disabilities, and substance abuse policy:

1. Discuss the historical context of contemporary health and mental health service systems and policies, including historical roots of inequality and discrimination in these systems and policies.
2. Understand specific current health and mental health policies regarding financing and legal issues such as client rights and confidentiality; explain the forces that influenced their development, their intended goals, and actual effects.
3. Explain the interrelationships among health and mental health policies at the federal, state, and local levels.
4. Identify the impact of organizational structures and policies outside the health and mental health systems on the delivery of services.
5. Discuss ethical issues in health and mental health policy, including individual and family rights, issues of distributive justice, and issues of power, discrimination, and oppression in policy development.
6. Explain the ways in which current health and mental health policies affect social workers’ activities and social interventions, and ultimately the individuals and families served, with a focus on vulnerable and oppressed populations.

7. Assess the impact of and biases in health and mental health policies regarding services to individuals and families of varied race, ethnic origin, gender, socioeconomic status, sexual orientation, and other factors of difference. Identify strategies for changing policies that result in oppressive or discriminatory conditions in health and mental health.

8. Articulate both formal and informal policy development and strategies at multiple system levels.

9. Develop strategies for planning, developing, and changing health and mental health policies in a context of empowerment and partnership with individuals, families and communities.

**EXPANDED DESCRIPTION:**

The ability to understand the complexities of policy development and implementation is crucial for successful practice in health and mental health, as social workers shape policy, implement programs, and respond to systemic inequities. This course will examine critically a number of relevant health and mental health policies and their effects on clients, practitioners, and systems.

Students who complete this course will develop the following skills:

1. The ability to assess the components of specific health and mental health policies, the different interests that are involved in shaping these policies, and the impact of the policies on social work practice and on clients.

2. The ability to identify ethical issues and personal/professional values related to the formal and informal policies affecting service delivery.

3. The ability to evaluate the inter-relationships among policies at the federal, state, local and agency levels.

4. The ability to understand and to assess the disparate impact of specific policies on individuals and families, considering different race, gender, ethnic origin, socioeconomic status, sexual orientation, and other disparities.

**TEXTBOOK:**


This text is available for purchase at the student bookstore. Additional readings will be either available through UNC e-journals or placed on Blackboard. Much other useful information, including lecture notes, will be found on Blackboard at https://blackboard.unc.edu/.

**RECOMMENDED READING AND OTHER RESOURCES:**

It will be helpful to read NC health and mental health law for this course. Health and mental health law for the state can be found on line at [www.ncleg.net/Statutes/Statutes.html](http://www.ncleg.net/Statutes/Statutes.html). Of particular interest may be G.S. 122C (public mental health law) and G.S. 103A (public health law). A more comprehensive list of web sites containing up-to-date information on policies in specific domains of practice is included on the “External Links” page of the Blackboard site.
TEACHING METHODS AND EXPECTATIONS:
Teaching methods will include, of course, lecture and class discussion, with guest lecturers for specific topics. For many of the class sessions, both sections of the course will meet together in the Auditorium for about one hour, and then we will return to our separate sections for discussion, activities, case studies, or simulations.

In addition, peer learning and inquiry will be crucial components of the class. Over the course of the semester, you will have opportunities, both individually and on “policy teams,” to investigate policy-related issues of interest and relevance to your own practice. Full participation in these activities will be essential to your learning process in the class, and will allow you to successfully apply the course material in a way that is personally and professionally meaningful.

All students are expected to attend all classes and to complete the readings before class begins. Students are expected to participate in discussions by sharing information from their reading and/or field experiences. I ask that you contact me, in advance, if you will miss a class. Any student with significant difficulty with class participation requirements should speak with me at the beginning of the semester so that alternative forms of contribution can be identified.

GUIDELINES FOR CLASS SESSIONS IN THE AUDITORIUM
Because the auditorium is the only space in our school that can accommodate two sections of a class at once, we will need to utilize it for selected lectures and guest speaker panels. As it is not always as discussion-friendly or engaging as our other classrooms, a few guidelines have been developed in order to maximize your learning and interaction. First, we will keep the lights turned up as brightly as is feasible. Second, we ask that you sit in the 1st 5-7 rows of seats, in the center section, in order to “pull in” the space. Finally, remember that, regardless of the spatial configuration, you are responsible for maintaining your own level of engagement and involvement in the discussion.

One more important note – food and beverages are not allowed in the auditorium. As we will only be there for about an hour at a time, this should not be an undue burden!

POLICY ON LAPTOPS
Please feel free to bring your laptops to class and to use them for note taking. They will also be useful for some of the small group activities that involve research or information gathering. I ask, however, that you show respect for your classmates by not becoming distracted by the easy availability of the Web, especially during discussions or student presentations.

CLASS ASSIGNMENTS:
You will be graded on policy analysis worksheets, a policy research paper, a policy team presentation, and a peer review. These are described briefly here, and in greater detail at the end of the syllabus.

Note: Jennie Vaughn, the course Teaching Assistant, will be available to consult with students on writing issues, and to review drafts of papers. Since the quality of your writing will contribute to your scores for the assignments, you are encouraged to take advantage of the opportunity to work with Jennie! She is available during office hours or by appointment.
A summary of the assignments follows:

1. **Policy Analysis Worksheets (35 points in all, 5 points per worksheet):** One of the most important outcomes of this class is that you develop the skills to systematically critique health and mental health policies related to your practice. In order to practice these skills, you will be asked over the course of the semester to conduct a series of systematic policy analyses using worksheets provided, and to make recommendations based on your analyses. The worksheets are due at the beginning of the class for which they are assigned.

2. **Research Paper (30 points):** The research paper is due on March 24 at 2pm in class. It is to be 12-15 pages (exclusive of title page, appendices and citations), written in accordance with APA guidelines. A brief description of your topic is due on February 25; this will ensure that we have the opportunity to talk about the topic and that it is manageable and appropriate.

   For the paper, you will select a specific, significant, problematic policy issue affecting delivery of health or mental health services. You can choose a specific policy formulated at the federal or state level (e.g. Federal confidentiality law 42 CFR-2), or a specific issue which has been created by a number of intersecting policies (e.g. difficulty providing narcotics for pain management during end of life care). Your selection should be of sufficient magnitude that its genesis and impact can be traced through the scholarly literature, incorporating information from course readings and outside research.

3. **Policy Presentation (25 points):** Presentations will occur during the final 2 class meetings on April 14 and 21. While the research paper focuses broadly on a significant policy issue, your presentation will describe how a particular health or mental health policy issue is playing out in North Carolina. You will work in teams of 4-5 students, and will present an analysis of the history and development of the policy in our State, an assessment of its impact on a range of stakeholders, a discussion of advocacy efforts, and a set of cogent recommendations for future work. Along with visuals, you will develop a 2-page maximum position paper for distribution in class, building the argument for and presenting your recommendations.

   Part of your research for the presentation will involve first-hand exploration of the issue through (a) conducting stakeholder interviews, and (b) attending a public forum or advocacy meeting related to the issue. You will decide among your team on the best way to distribute these tasks.

4. **Peer Review (10 points):** Using a template that will be provided, you will critique the presentation of another policy team, identifying strengths, areas for improvement or enhancement, and suggestions for accomplishing these. This is not to be a paper – rather you will simply fill in the table provided. The peer review will be due, by email, by April 28 at 2:00 pm.
SUMMARY OF COURSE EVALUATION COMPONENTS AND GRADING SCALE
The following summarizes the point breakdown and grading scale for the class:

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
<th>Grade Criteria</th>
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<tbody>
<tr>
<td>Policy Analysis Worksheets</td>
<td>35%</td>
<td>H: 94 and above</td>
</tr>
<tr>
<td>Research Paper</td>
<td>30%</td>
<td>P: 93-80</td>
</tr>
<tr>
<td>Policy Presentation</td>
<td>25%</td>
<td>L: 79-70</td>
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<tr>
<td>Peer Reviews</td>
<td>10%</td>
<td>F: 69 and below</td>
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POLICY ON INCOMPLETES AND LATE ASSIGNMENTS:
A grade of Incomplete will be given only in extenuating circumstances and in accordance with University policy. Assignments are due by 2pm in class on the day as noted in the course outline. An extension on the paper may be given with prior approval if you contact me 24 hours or more in advance and have a compelling reason. Late assignments, i.e., those not handed in on the day and time due, will be reduced 10 percent for each day (including week-end days) they are late. Please keep me informed if any problems arise.

POLICY ON ACADEMIC DISHONESTY:
I assume that all students follow the UNC Honor Code. Please ensure that the Honor Code statement “I have neither given nor received any unauthorized assistance in completing this assignment”, with your signature, is on all assignments turned in. In keeping with the Honor Code, if reason exists to believe that academic dishonesty has occurred, a referral will be made to the Office of the Student Attorney General for investigation and further action as required.

Please refer to the APA Style Guide, the SSW Manual, and the SSW Writing Guide for information on attribution of quotes, plagiarism, and the appropriate use of assistance in preparing assignments.

POLICY ON ACCOMMODATIONS FOR STUDENTS WITH DISABILITIES:
Please talk with me early in the semester if you have a disability that affects your participation in the course, and we can identify any accommodations that will support your learning.
ASSIGNMENT: POLICY ANALYSIS WORKSHEETS

For each week in which the topic on the syllabus is a “policy issue,” you will be assigned two articles, and will find and read, on your own, one additional relevant article. You will complete the exercise below, identifying the political, economic, scientific, ethical, and practice-related reasons to keep or to change the policy. You will evaluate the policy by stating your opinion and your reasoning about whether and in what ways it should be changed.

You will submit the attached Policy Worksheet in order to document your thinking process. A blank worksheet will be posted on Blackboard so that you can fill it in on the computer – or, you can print it out and fill it in by hand. **Either way, you will turn in a hard copy at the BEGINNING of the class in which the policy is discussed.** Each analysis is worth 5 points, for a total of 35 points.

**Guidelines:** Within each domain, you will provide information that supports and/or opposes the policy under discussion. You can use the following to structure your thinking:

- **Political:** Which constituencies might see this policy as desirable or undesirable? Why? Does the policy favor, or disfavor, the agenda(s) of any specific groups? Who and how? Does the policy relate to, match, or contradict other laws or policies? How?

- **Economic:** What are the short-term and long-term costs and benefits of this policy? Does the policy benefit or incur costs to any specific group? Who and how?

- **Science:** What is the evidence supporting, or contraindicating, implementation of the policy? Is the evidence consistent or mixed? Are there different impacts on different groups of consumers? Does the research apply to the people intended to be affected by the policy? Are all groups adequately represented in the research?

- **Ethics:** What values (e.g., autonomy and individual rights, public safety, inclusion, client well-being, equality, justice) are promoted, or thwarted by this policy? If these values contradict, how and which values will trump? Does the policy have a differential impact on particular groups of people? Does the policy operate in a way that promotes social justice, or does it contribute to oppression or discrimination?

- **Practice:** How is the policy implemented in practice? Is it implemented as intended? Is it implemented fairly across people, or is there discrimination? Why? What are barriers and facilitators to effectively applying the policy in practice? Will advocacy improve implementation? In what way(s)?

Please note that the goal of this exercise is not to become expert in the content of the specific policy; nor is it to identify a “right answer” regarding its desirability. Instead, the goal is for you to practice the process of policy analysis, using a systematic and comprehensive framework.

We will also be using your policy analyses for in-class exercises. They will be the starting point for small group discussions in greater depth about the political, economic, science, ethical, and practice domains. Thus, it will be important to complete the worksheets thoughtfully.
POLICY ANALYSIS WORKSHEET

Name: __________________________
Date: __________________________

Policy Name/Definition:
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

<table>
<thead>
<tr>
<th>Reasons to Keep Policy (+ pros)</th>
<th>Reason to Change Policy (- cons)</th>
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<tbody>
<tr>
<td>Political</td>
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<td>Economic</td>
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<td>Ethics</td>
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<td>Practice</td>
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Evaluation: Would you keep or change policy? If you keep it, how would you improve it to address the downsides? If you were to fundamentally change it, how?
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

SOWO 830 Spring 08
ASSIGNMENT: POLICY RESEARCH PAPER
TOPIC DUE: FEBRUARY 25
PAPER DUE: MARCH 24

Throughout the paper cite all sources in APA format. A paper of this magnitude should have no fewer than 10 scholarly citations in addition to class reading. Beyond these ten scholarly citations, other citations may be used. The following is an outline that will help you to organize your paper:

POLICY ISSUE:
Identify the policy issue with specificity; summarize its importance and why you see it as problematic.

HISTORY AND CONTEXT:
A. Present the history of the policy’s evolution over time. Were legislative mandates, economic/social pressures, and/or large historical events contributing factors?
B. Describe implementation of the policy in 2 different US states (one can certainly be NC!). What similarities or differences do you observe? What factors (social, economic, cultural, ideological) and/or values might account for these?
C. Select one country outside the US, and research how similar policy issues are resolved. Briefly discuss similarities and differences. What factors (social, economic, cultural, ideological) and/or values might account for these?

POLICY IMPACT:
Describe the impact (positive/negative) of the policy on (a) consumers/families, (b) providers, and (c) service systems. Discuss the impact on persons of varied race, ethnic origin, gender, socioeconomic status, age, sexual orientation, and/or other relevant factors of difference.

ADVOCACY:
Discuss major advocacy efforts that have taken place around the policy issue. Describe the various stakeholder groups involved, their advocacy-related activities, and their positions on the issue. Provide insight into any assumptions or values that appear to be driving the debate.

RECOMMENDATIONS FOR CHANGE:
A. Conclude with potential recommendations and a rationale for change to the policy that you would make as a social work professional
B. Identify one or more specific strategies for how a social worker might advocate for change in this policy. Discuss how you would include consumers in your strategies.

EVALUATION CRITERIA
1. The content of the paper includes all elements outlined above. (20%)
2. The paper is written clearly, free of errors, and using APA format. (20%)
3. Source materials are of sufficient number and depth and appropriate to the subject. (10%)
4. Issues of diversity and disparity are addressed. (20%)
5. Analytical, critical, and original thinking are demonstrated. This includes a logically structured argument, cohesive and well-synthesized use of the literature, and some original thinking that is identified as your own interpretation, going beyond the literature. (30%)
ASSIGNMENT: POLICY CASE STUDY PRESENTATION
PRESENTATIONS: APRIL 14 AND 21
PEER REVIEWS DUE: APRIL 28

This presentation will require visual aids. In addition, you will distribute to the class a 2-page maximum position paper summarizing the policy issue and reflecting your team’s recommendations. All relevant facts and figures should be accompanied by full citations. You will have about 45 minutes to make this presentation, including time for the questions and discussion. The following outline will help you to organize the presentation.

IDENTIFY THE ISSUE:
Clearly identify the policy or policy issue you are discussing. Describe the genesis of the issue in North Carolina – Were legislative mandates, economic/social pressures, and/or large historical events contributing factors?

DESCRIBE THE IMPACT:
Describe the current impact (positive/negative) of the policy on (a) consumers and families, (b) providers, and (c) related service systems. In addition to a general discussion of impact, cite at least 3 primary data sources. Discuss the impact on persons of varied race, ethnic origin, gender, socioeconomic status, age, sexual orientation, and/or other factors of difference.

DISCUSS ADVOCACY:
Discuss current advocacy efforts taking place around the policy issue. Describe the various stakeholder groups involved in the debate, their advocacy-related activities, and their positions on the issue. Provide insight into any assumptions or values that appear to be driving the debate. Summarize the content and process of the meeting or public forum which you attended as an illustration of current advocacy efforts.

MAKE RECOMMENDATIONS:
Generate at least three cogent recommendations regarding future work in developing effective North Carolina policy related to your issue. Your recommendations can relate to research or information gathering, stakeholder involvement and advocacy, education, and/or other ideas.

LEAD A DISCUSSION:
Identify 2 questions you would like the class to discuss related to your presentation, and lead discussion on them to close your presentation. Take questions from the class.

EVALUATION CRITERIA:
1. The content includes all relevant elements as outlined above. (20%)
2. The presentation is thorough and well researched. (25%)
3. The questions for discussion are substantial, and the discussion is effectively facilitated. (15%)
4. The position paper is clear, well-developed, well-argued, easy to follow, and convincing. The recommendations in the position paper follow logically from the evidence. (30%)
5. The presentation is effective—good visuals, organized, engaging, keeping to time. (10%)
# Course Outline

<table>
<thead>
<tr>
<th>Date</th>
<th>Topic</th>
<th>Readings</th>
<th>Goals</th>
<th>Activities</th>
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<tbody>
<tr>
<td>Jan 14</td>
<td>Welcome &amp; Overview</td>
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[http://ncpsychiatry.org/NCPAReportCard.pdf](http://ncpsychiatry.org/NCPAReportCard.pdf)  
Related Reading: Moniz & Gorin Ch. 2, 3 | To appreciate the evolution of Health & MH policy  
To understand MH Reform in historical perspective  
To practice applying the Policy Pinball analogy & using the Policy Analysis Worksheet | Speaker – Anna Scheyett  
Analysis of MH Reform using Policy Pinball analogy & Policy Analysis Worksheet |
Disability Rights Timeline  
[http://www.sfsu.edu/%7Ehrdpu/chron.htm](http://www.sfsu.edu/%7Ehrdpu/chron.htm)  
**Posted on Blackboard:**  
• Excerpts from the ADA, Olmstead, MH Consumers’ Self Help Clearinghouse Training Curriculum on Self Advocacy | To understand the context & evolution of disability rights  
To identify local consumer advocacy resources  
To understand the importance of & strategies for promoting consumer self-advocacy | Speakers from advocacy organizations  
Case study simulations |
<table>
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<tr>
<th>Date</th>
<th>Topic</th>
<th>Readings</th>
<th>Goals &amp; Activities</th>
<th>Due</th>
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NC Legislature Website: Citizen Guide (read through to develop a basic familiarity with the NC Legislature structures & processes) [http://www.ncleg.net/CitizenGuide/CitizenGuide.html](http://www.ncleg.net/CitizenGuide/CitizenGuide.html)  
**PLUS:** Find & read **one article** on a significant health/MH disparity (remember that disparities are systematic inequities based on social rather than medical conditions). You can use references cited in Moniz & Gorin, or choose an issue that interests you.  
**Related Reading:** Moniz & Gorin Ch. 7 & 8 |  
- To gain awareness of NASW advocacy resources  
- To understand principles of effective legislative advocacy  
- To practice developing advocacy plans  
**Activities:**  
- Speakers from NASW & SSW on advocacy  
- Development of an advocacy plan for addressing a health or mental health disparity |  
**Suggestions for your own article choice:**  
- Relevant articles cited in assigned readings  
- Developing affordable housing options for homeless persons  
- Community responses to homelessness |  
- To understand policy issues framing provision of services for chronically homeless persons  
- To differentiate “Housing First” from other models  
- To identify initiatives addressing homelessness  
**Activities:**  
- Speaker panel  
  - Homeless Policy Specialist  
  - Housing for New Hope  
- Worksheet Discussion | Policy Analysis Worksheet #1 |
<table>
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<tr>
<th>DATE</th>
<th>TOPIC</th>
<th>READINGS</th>
<th>GOALS &amp; ACTIVITIES</th>
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<tbody>
<tr>
<td>Feb 25</td>
<td><strong>Policy Issue</strong></td>
<td><strong>Required Reading:</strong></td>
<td><strong>Goals:</strong></td>
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<td></td>
<td>Jail Diversion, MH &amp; Drug Courts</td>
<td>treatment of severely mentally ill offenders under the jurisdiction of</td>
<td>with MH/SA disorders &amp; criminal justice involvement</td>
<td>Worksheet #2</td>
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<td>the criminal justice system: A review. <em>Psychiatric Services</em>, 50(7),</td>
<td>To identify effective interventions for this group of consumers, &amp; policies which</td>
<td>Paper Topic Due</td>
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<td>907-913.</td>
<td>support the interventions</td>
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<td>health court in reducing criminal recidivism and violence. *American</td>
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<td><em>Journal of Psychiatry</em>, 164(9), 1395-1403.</td>
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<td><strong>Suggestions for your own article choice:</strong></td>
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<td></td>
<td>• Relevant articles cited in assigned readings</td>
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<td>• Jail Diversion, Mental Health or Drug Court</td>
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<td>• Criminal Justice response to MH &amp;/or SA</td>
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<td>Mar 3</td>
<td><strong>Policy Issue</strong></td>
<td><strong>Required Reading:</strong></td>
<td><strong>Goals:</strong></td>
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<td></td>
<td>Settings</td>
<td><strong>Plus:</strong> Choose from the following groups, &amp; find/read two articles</td>
<td>To identify facilitators &amp; barriers to provision &amp; receipt of effective care</td>
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<td>related to use of publicly funded health, MH, or SA services:</td>
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<td></td>
<td></td>
<td>• Children</td>
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<td>• Immigrants</td>
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<td>• Persons with HIV</td>
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<td>• Adolescents</td>
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<td>• Women experiencing domestic violence</td>
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<td>Within that population, you can focus on a range of issues:</td>
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<td>• Insurance coverage; access to care; quality of care</td>
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<td>• Confidentiality &amp; disclosure requirements</td>
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<td>• Federal or State policies affecting care providers</td>
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<td>• Other issues of relevance to your practice</td>
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<td><strong>Related Reading:</strong></td>
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<td>Moniz &amp; Gorin, Ch. 4, 6, &amp; 7</td>
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**Mar 10: Happy Spring Break !!!**
<table>
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<tr>
<th>DATE</th>
<th>TOPIC</th>
<th>READING</th>
<th>GOALS &amp; ACTIVITIES</th>
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<tr>
<td>DATE</td>
<td>TOPIC</td>
<td>READINGS</td>
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<tr>
<td>Mar 31</td>
<td><strong>Policy Issue</strong></td>
<td><strong>Psychiatric Advance Directives</strong></td>
<td><strong>Goals:</strong></td>
<td><strong>Policy Analysis</strong></td>
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</table>
• To identify strategies for effective development & use of PAD’s, & policies that support these strategies | **Worksheet #6**          |
|        |                           | **Suggestions for your own article choice:**  
• Relevant articles cited in assigned readings  
• Advance directives for other populations/conditions | • Lecture by Eric  
• Worksheet Discussion | **Policy Analysis**      |
| Apr 7  | **Policy Issue**          | **Guardianship & Representative Payeeship**                                                                                                                                                           | **Goals:**                                                                                                                                                                                                                                                                  | **Worksheet #7**         |
|        | **Required Reading:**     | Marson, D. C., Sawrie, S. M., Snyder, S., McInturff, B., Stalvey, T., Boothe, A., et al. (2000). Assessing financial capacity in patients with Alzheimer disease: A conceptual model and prototype instrument. *Archives of Neurology, 57*(6), 877-884. | • To understand policy issues framing payeeship & guardianship  
• To compare guardianship policies for mental health consumers to those for older adults with Alzheimer’s disease or Dementia  
• To identify effective guardianship/payeeship strategies & policies that support them | **Policy Analysis**      |
|        |                           | **Suggestions for your own article choice:**  
• Relevant articles cited in assigned readings  
• Consumer &/or family advocacy efforts around guardianship/payeeship | • Lecture by Eric  
• Worksheet Discussion |                         |

**Apr 14 & 21: Presentations**

**Apr. 28: Peer Review Due**