

**THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL
SCHOOL OF SOCIAL WORK**

COURSE NO. & SECTION: SOWO 530 (Section 002)

COURSE TITLE & YEAR: Foundations of Social Welfare & Social Work
Fall Semester 2009

MEETING TIMES: Mondays 9:00 – 11:50 am

INSTRUCTOR: Laurie Selz Campbell, MS, CPRP
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OFFICE HOURS: Mondays 12:30 – 1:30 and by appointment

COURSE DESCRIPTION: Introduces public welfare policy through lecture and discussion of the purposes public welfare serves and describes the most important programs created by those policies.

COURSE OBJECTIVES: By the end of this course, students will:

1. Demonstrate knowledge of current social welfare policies and programs in the U.S. and the ideals which shaped existing public welfare structures;
2. Identify and describe the social concerns which those structures have or have not been able to address successfully. Special attention will be given to their impact on various family types.
3. Demonstrate an understanding of the role of social work and effects of social policy on historic and contemporary patterns of social welfare service provision;
4. Rigorously evaluate existing research related to social welfare policy and demonstrate knowledge of the development and implementation of contemporary social welfare policy;
5. Demonstrate an understanding of the values and ethics of social work that guide professional behavior in the conduct of public policy activities;
6. Demonstrate skill in strategies for advocacy and social change that advance social and economic justice;
7. Identify conditions that promote or deter equal access to resources for minorities and women and be able to discuss concerns related to race, disability, gender and sexual orientation.

SKILLS BASE ADDRESSED: By the end of the course, students will be able to:

1. Describe the origins and unique characteristics of the social work profession.
2. Assess clients for eligibility for major publicly funded programs and/or benefits.
3. Analyze the effects of social welfare policies on well-being and opportunities for lower-income individuals and families, as well as for other vulnerable populations.
4. Articulate the underlying values and principles shaping major public welfare policies.
5. Describe how legislative and administrative policy is made and how to influence policy development.

REQUIRED TEXTS:

The three required texts can be purchased at the Health Sciences Bookstore or online:

Carlton-LaNey, I. (2001). *African American leadership: An empowerment tradition in social welfare history*. Washington, DC: NASW Press. (ICL in syllabus)

Davis, K. E. & Bent-Goodley, T. B. (eds). (2004). *The color of social policy*. Alexandria, VA: Council on Social Work Education. (DBG in syllabus)

Gilbert, N. & Terrell, P. (2010). *Dimensions of social welfare policy*. (7th Ed.). Boston: Allyn & Bacon. (GT in syllabus)

Additional required readings can be found at the URL stated on the reading list, OR via Blackboard at <http://blackboard.unc.edu/> under "Assignments"

TEACHING METHODS AND EXPECTATIONS:

Teaching methods will include lecture and class discussion, as well as multimedia presentations and small group activities. My perspective is that we all have much to learn AND much to teach. Full participation is 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.

POLICIES ON THE USE OF ELECTRONIC DEVICES IN THE CLASSROOM:

I expect that we will all be invested in creating a learning environment of respect and engagement. During class, cell phones should be turned off or silenced. I welcome the use of laptops in class for taking notes or completing small group tasks. However, I ask that you use them *only* for relevant activities – not for checking email or surfing the Web. Your attention is an important sign of respect to your colleagues, and an important part of your learning.

COURSE ASSIGNMENTS, EXPECTATIONS, AND SCORING RUBRIC:

You will be graded on the following assignments for the course:

In-Class Midterm	20 points		
Budget Case Study	15 points		
Policy Brief	20 points		
Policy Testimony	10 points	H:	94 and above
Panel Questions	5 points	P:	93-80
Take-Home Final	20 points	L:	9-70
Participation	<u>10 points</u>	F:	69 and below
Total:	100 points		

The **Budget Case Study** and **Testimony Assignment** (policy brief, policy testimony, and panel questions) guidelines can be found starting on page 11.

Expectations for written assignments: Students are expected to adhere to appropriate scholarly writing guidelines. A portion of the points for each assignment will be allocated to writing issues. Please use the resources provided at orientation to help yourself to master academic writing skills. The web sites listed below provide additional information:

- <http://ssw.unc.edu/index.php?q=students/academic/advising> (Academic resources from the School of Social Work, including an APA quick reference guide)
- <http://www.apastyle.org/apa-style-help.aspx> (APA Style basics)
- http://owl.english.purdue.edu/handouts/research/r_apa.html (general information about documentation using APA style)

POLICY ON INCOMPLETES AND LATE ASSIGNMENTS:

Assignments are due at the **beginning** of class on the day noted. You must notify me at least 3 days before a due date if you would like to be granted an extension. If this does not happen, you will lose 10% of the assignment's points per day (including weekends, and including the date on which the assignment was due, if you submit it after the beginning of class).

Incompletes may be granted if (a) there are extreme and unforeseeable circumstances that affect your ability to complete the semester's work, and (b) you meet with me in advance to develop a plan and timeline for completing your work.

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:

If you have a disability that affects your participation in the course and you wish to receive accommodations, you should contact the University's Disabilities Services. They will then notify me of the documented disability, and we can meet to design the appropriate accommodations to support your learning.

CLASS SCHEDULE & ASSIGNED READINGS

Week 1: 8/31	Introduction & Overview
	<ul style="list-style-type: none"> • Introductions & course overview
	** NO CLASS ON MONDAY, SEPTEMBER 7 – LABOR DAY HOLIDAY **
Week 2: 9/14	History & Context of Social Welfare Policy
	<ul style="list-style-type: none"> • Describe historical foundations of modern social welfare • Identify major changes in social welfare from 1932 to present • Explain the significance of the New Deal • Explain how disability is socially constructed & how such constructions have changed over time
Readings:	<p><u>Required:</u></p> <p>GT: Chapter 1: The Field of Social Welfare Policy</p> <p>Blau, J. (2007). Social welfare history in the United States. In J. Blau, <i>The dynamics of social welfare policy</i> (pp. 232-288). New York: Oxford University Press.</p> <p>Braddock, D. & Parish, S. L. (2001). An institutional history of disability. In G.L. Albrecht, K. D. Seelman, & M. Bury (Eds.), <i>Handbook of disability studies</i> (pp. 11-13; 29-54). Thousand Oaks, CA: Sage.</p> <p><u>Supplemental:</u></p> <p>Burch, S., & Sutherland, I. (2006). Who's not yet here? American disability history. <i>Radical History Review</i>, 94, 127-147.</p>
Week 3: 9/21	Progressive Era Roots of Modern Social Work
	<ul style="list-style-type: none"> • Describe the roots of social work in the late 19th and early 20th centuries • Understand the contributions of African-American social work pioneers • Analyze the early impact of social policies on racial and ethnic groups
Readings:	<p><u>Required:</u></p> <p>ICL:</p> <p>Chapter 2: African Americans & Social Work in Philadelphia, 1900–1930</p> <p>Chapter 3: Birdye Henrietta Haynes</p> <p>Chapter 5: Marcus Garvey</p> <p>Chapter 6: Ida B. Wells-Barnett</p> <p>Chapter 7: Lawrence Oxley</p> <p>Chapter 8: George Edmund Haynes & Elizabeth Ross Haynes:</p> <p>DBG:</p> <p>Chapter 1 : Oppression of Indigenous Tribal Populations</p> <p>Chapter 2 : Mexicans, Chinese, & Japanese in America</p>

Week 4: 9/28	Understanding Income, Wealth & Poverty in the U.S.
	<ul style="list-style-type: none"> • Explain different perspectives on poverty and a living wage • Explain poverty risk factors & effects on children • Identify and make sense of economic trends that shape opportunity for persons living in poverty
Readings:	<p>Required: Action for Children North Carolina (2008). <i>Child poverty in North Carolina: A preventable epidemic</i>. (Economic Security Issue Brief).</p> <p>Boushey, H. & Weller, C.E. (2005). What the numbers tell us. In J. Lardner & D.A. Smith (Eds.), <i>Inequality matters</i>, (pp. 27-40). New York: The New Press.</p> <p>Haskins, R. & Sawhill, I. (2007). Introducing the issue: The next generation of antipoverty policies. [Special Issue] <i>The Future of Children</i>, 17(2): 3-16.</p> <p>Rector, R. & Johnson, K. (2004). <i>Understanding poverty in America</i>. Washington, DC: Heritage Foundation. http://www.heritage.org/Research/Welfare/upload/53977_1.pdf</p> <p>Shapiro, T. (2004). Assets for equality (pp. 183-204). In <i>The hidden cost of being African-American: How wealth perpetuates inequality</i>. New York: Oxford.</p> <p>U.S. Census Bureau. (2008). <i>Income, poverty, and health insurance coverage in the United States: 2007</i>. (pp. 5-18). http://www.census.gov/prod/2008pubs/p60-235.pdf</p> <p>Supplemental: Guendelman, S., Angulo, V., & Oman, D. (2005). Access to health care for children and adolescents in working poor families: Recent findings from California. <i>Medical Care</i>, 43(1), 68-78.</p>
Week 5: 10/5	The Modern Social Welfare System The Basis of Social Allocations: <i>Who Gets Help? The case of social security reform</i> * TESTIMONY ABSTRACT DUE *
	<ul style="list-style-type: none"> • Identify the key characteristics and scope of the social welfare system • Explain the differences among social, occupational and fiscal welfare • Explain the key differences between universal and selective social welfare • Apply Gilbert & Terrell's analytical framework to major social programs • Describe the bases upon which selective social welfare programs target different populations
Readings:	<p>Required: GT: Chapter 2: The Modern Welfare State Chapter 3: A Framework for Social Welfare Policy Analysis Chapter 4: The Basis of Social Allocations</p> <p style="text-align: right;">Readings continued on next page</p>

<p>Week 5 Readings, continued:</p>	<p>DBG: Chapter 5: Social Security Reform & People of Color</p> <p>Social Security Administration. (2007). Social Security: A brief history (read pp. 1-19) (SSA Publication No. 21-059). http://www.ssa.gov/history/pdf/2007historybooklet.pdf</p> <p>Scan these electronic documents for program eligibility and benefits:</p> <p>Social Security Administration. (2008). Retirement benefits. (SSA Publication No. 05-10035). http://www.socialsecurity.gov/pubs/10035.pdf</p> <p>Social Security Administration. (2008). Survivor benefits. (SSA Publication No. 05-10084). http://www.socialsecurity.gov/pubs/10084.pdf</p> <p>U.S. Department of Agriculture. (2008). Nutrition Assistance Programs. http://www.fns.usda.gov/fns/default.htm (scroll to bottom of page and scan information on Food Stamps, WIC, and School Meals programs)</p> <p>U.S. Department of Housing and Urban Development (2008). Housing choice vouchers. http://www.hud.gov/offices/pih/programs/hcv/about/fact_sheet.cfm</p> <p>Supplemental:</p> <p>Social Security Administration. (2008). Qualify and apply (Social Security retirement). http://www.ssa.gov/r&m2.htm</p> <p>Social Security Administration (2008). Qualify and apply (Widows, Widowers & Other Survivors). http://www.ssa.gov/ww&os2.htm</p>
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<p>Week 6: 10/12</p>	<p>Midterm Exam</p>
<p>Week 7: 10/19</p>	<p>The Basis of Social Allocations: <i>Who Gets Help?</i> <i>The case of benefits for persons with disabilities</i></p>
	<ul style="list-style-type: none"> • Describe the ways in which resources are allocated to persons with disabilities • Discuss incentives and disincentives related to economic self sufficiency for persons accessing disability-related benefits
<p>Readings:</p>	<p>Required:</p> <p>Dickson-Gomez, J., Convey, M., Hilario, H., Corbett, A., & Weeks, M. (2007). Unofficial policy: Access to housing, housing information & social services among homeless drug users in Hartford, Connecticut. <i>Substance Abuse Treatment, Prevention, & Policy</i>, 2(8), 1-14.</p> <p>Scan these electronic documents for program eligibility rules and benefits:</p> <p>Henry J. Kaiser Family Foundation (2007). <i>Medicaid: A primer</i> (pp. 1- 12; 17-19). http://www.kff.org/medicaid/upload/Medicaid-A-Primer-pdf.pdf</p> <p>Henry J. Kaiser Family Foundation (2007). <i>Medicare: A primer</i> (read pp. 1-10; 15-16). http://www.kff.org/medicare/upload/7615.pdf</p> <p style="text-align: right;">Readings continued on next page</p>

<p>Week 7 Readings, continued:</p>	<p>NC DHHS (2009): Summary of Medicaid eligibility in North Carolina: http://www.dhhs.state.nc.us/dma/medicaid/basicmedelig.pdf</p> <p>Social Security Administration. (2007). Supplemental Security Income. (SSA Publication No. 05-11000). http://www.socialsecurity.gov/pubs/11000.pdf</p> <p>Social Security Administration. (2008). Disability benefits. (SSA Publication No. 05-10029). http://www.socialsecurity.gov/pubs/10029.pdf</p> <p>Supplemental:</p> <p>Parish, S.L., Rose, R.A., Grinstein-Weiss, M., Richman, E.L. & Andrews, M.E. (2008). Material hardship in U.S. families raising children with disabilities. <i>Exceptional Children</i>, 75(1), 71-92.</p> <p>Social Security Administration (2008). Understanding Supplemental Security Income: http://www.ssa.gov/ssi/text-understanding-ssi.htm</p> <p>Social Security Administration. (2008). Disability benefits http://www.ssa.gov/pubs/10029.html</p>
<p>Week 8: 10/26</p>	<p>The Nature of Social Provision: <i>What Do They Get?</i> The case of 1996 welfare reform</p>
	<ul style="list-style-type: none"> • Compare and contrast cash vs. in-kind benefits • Analyze the values and policy goals associated with different forms of social provision • Compare TANF to its predecessor, AFDC • Assess the outcomes of welfare reform, with a focus on persons with significant work barriers
<p>Readings:</p>	<p>Required:</p> <p>GT: Chapter 5: The Nature of Social Provision</p> <p>DBG: Chapter 11: African-Americans and Welfare Reform.</p> <p>Abramovitz, M. (2001). Everyone is still on welfare: The role of redistribution in social policy. <i>Social Work</i>, 46, 297-308.</p> <p>Besharov, D. (2006). <i>Two cheers for welfare reform</i>. University of Maryland, School of Public Policy: http://www.welfareacademy.org/pubs/welfare/twocheersforwelfarereform.pdf</p> <p>Blank, R.M. (2007). Improving the safety net for single mothers who face serious barriers to work. [Special Issue] <i>The Future of Children</i>, 17,2: 183-197.</p> <p>Loprest, P. & Martinson, K. (2008). <i>Supporting work for low-income people with significant challenges</i> (New Safety Net Paper 5). Washington, DC: The Urban Institute. http://www.urban.org/UploadedPDF/411726_supporting_work.pdf</p> <p>TANF in North Carolina: http://www.dhhs.state.nc.us/dss/workfirst/index.htm</p>

Week 9: 11/2	Benefits Seminar: Comparing Findings from the Budget Assignment * BUDGET CASE STUDY DUE *
	<ul style="list-style-type: none"> • Identify major public social welfare programs that help meet basic needs of lower-income households • Explain how the private sector also meets basic needs • Understand common benefit pairings
Readings:	No assigned readings, but you will have completed research on public and private sector social welfare programs to complete the Budget Assignment. You will compare and discuss your findings in small groups.
Week 10: 11/9	Families at the Intersection of Multiple Social Welfare Systems
	<ul style="list-style-type: none"> • Identify the range of social welfare programs that are frequently accessed concurrently by families in poverty • Understand the burdens experienced by vulnerable families attempting to navigate the complexities of multiple social welfare programs
Readings:	<p>Required:</p> <p>Blome, W., & Steib, S. (2004, July). Like musical chairs? Become a child welfare worker. <i>Child Welfare</i>, 83(4), 381-384.</p> <p>Morgenstern, J., Nakashian, M., Woolis, D., Gibson, F., Bloom, N., & Kaulback, B. (2003). Casaworks for families: a new treatment model for substance-abusing parenting women on welfare. <i>Evaluation Review</i>, 27(6), 583-596.</p> <p>Substance Abuse & Mental Health Services Administration (2001). Selections from <i>Critical Issues for Parents with Mental Illness & their Families</i>: Executive summary: http://mentalhealth.samhsa.gov/publications/allpubs/KEN-01-0109/execsumm.asp</p> <p>Policies impacting parents with mental illness: http://mentalhealth.samhsa.gov/publications/allpubs/KEN-01-0109/ch5.asp</p> <p>Supplemental:</p> <p>Bloom, B., Covington, S., & Owen, B. (2004). Women offenders and the gendered effects of public policy. <i>Review of Policy Research</i>, 21(1), 31-48. Retrieved September 7, 2009, from Women's Studies International database.</p> <p>Courtney, M. Dworsky, A., Piliavin, I., & Zinn, A. (2005). Involvement of TANF applicant families with child welfare services. <i>Social Service Review</i>, 79(1), 119-157.</p> <p>Lindhorst, T., & Padgett, J. (2005). Disjunctures for women and frontline workers: implementation of the family violence option. <i>Social Service Review</i>, 79(3), 405-429</p> <p>Semidei, J., Radel, L., & Nolan, C. (2001). Substance abuse and child welfare: clear linkages and promising responses. <i>Child Welfare</i>, 80(2), 109-128.</p>

Week 11: 11/16	The Design of the Delivery System: <i>How Do They Get Help?</i> The case of mental health reform in North Carolina
	<ul style="list-style-type: none"> • Understand privatization, decentralization & managed care effects on service delivery, including access & fragmentation • Examine professional & paraprofessional roles in service delivery • Discuss disparities in access the mental health service delivery system • Develop ideas for improving access, coordination, and effectiveness of services
Readings:	<p>Required:</p> <p>GT: Chapter 6: The Design of the Delivery System DBG: Chapter 7: Mental Health Policy and People of Color</p> <p>Goldman, H., & Morrissey, J. (1985). The alchemy of mental health policy: Homelessness and the fourth cycle of reform. <i>American Journal of Public Health, 75</i>(7), 727-731.</p> <p>Scheyett, A. (2008). <i>Mental health reform in North Carolina: A cautionary tale.</i> (PowerPoint presentation). UNC Chapel Hill School of Social Work.</p> <p>Swartz, M., & Morrissey, J. (2003). Mental health care in North Carolina: Challenges on the road to reform. <i>North Carolina Medical Journal, 64</i>(5), 1-7.</p> <p>Supplemental:</p> <p>Barry, C. (2006). The political evolution of mental health parity. <i>Harvard Review of Psychiatry, 14</i>(4), 185-194.</p>

Week 12: 11/23	Financing Social Welfare: <i>Who Pays For It?</i> The case of national healthcare reform
	<ul style="list-style-type: none"> • Explain the major ways in which social welfare programs are funded • Compare private and public funding strategies and levels • Discuss the market-based approach to funding health care • Identify conservative, moderate, and liberal perspectives on health care financing
Readings:	<p>Required:</p> <p>GT: Chapter 7: The Mode of Finance: Sources of Funds</p> <p><u>Conservative Views</u></p> <p>Butler, S.M. & Owcharenko, N. (2008). <i>Ensuring access to affordable health insurance: A memo to president-elect Obama</i> (Special Report #27). Heritage Foundation. http://www.heritage.org/Research/HealthCare/sroo27.cfm</p> <p>Ornstein, N. (2009). <i>Obama and allies must not dawdle on health care reform</i> (Articles and Commentary). American Enterprise Institute for Public Policy Research. http://www.aei.org/article/100792</p> <p><u>Moderate Views</u></p> <p>Blumberg, L.J. & Holahan, J. (2009). <i>Beyond the \$1.6 trillion sticker shock.</i> Urban Institute Health Policy Center. http://www.urban.org/health_policy/url.cfm?ID=411923</p> <p style="text-align: right;">Readings continued on next page</p>

	<p><u>Liberal Views</u> Families USA (2009). <i>Why employers should share the responsibility of paying for health care</i>. Talking about health care reform. http://www.familiesusa.org/assets/pdfs/health-reform/employer-responsibility.pdf</p> <p>Noah, T. (2009). <i>Health reform can pay for itself</i>. Slate Magazine Online. http://www.slate.com/id/2223213/</p>
Week 13: 11/30	Policy Testimony Presentations * POLICY BRIEFS DUE *
Week 14: 12/7	Policy Presentations

ASSIGNMENT: Budget Case Study Exercise

DUE: November 2, 2009

General scope of the assignment:

As social workers you will often work with individuals who are attempting to survive with very little income, assets and other resources. They face difficult choices about how to spend their limited dollars to meet their basic needs. This exercise is intended to help you learn more about the struggles and dilemmas that families face to meet their basic needs and the public and private sector resources that can help.

Instructions:

1. You will be provided with a description of a family living in a particular North Carolina county and their income and other resources.
2. Complete the **household budget worksheet** in the "Budget Assignment – Household Budget Template" file on Blackboard. Use information in the description to record income and resources posted on Blackboard to help you estimate household expenses for your family to meet its basic needs. Be sure to consider family size and the particular county. The expense amounts do not need to be exact. Reasonable estimates, such as for an electric bill, are fine.
3. Research different public and private sector monetary and in-kind **sources of assistance** in the identified county for which you think your family is eligible. Use links on Blackboard to help you. Be sure to carefully examine eligibility rules for public assistance programs (Food Stamps, Section 8, etc.) and don't overlook important sources of assistance from the private sector (local nonprofits, faith communities, etc.). You do *not* need to obtain eligibility confirmation from local agency representatives. However, you need to do enough research to make reasonable assumptions about eligibility.
4. Complete the **resources worksheet** in the same template document. Be sure only to list sources of assistance for which you are very confident that the family would be eligible.
5. For both worksheets, be sure to review the example and guidelines in the file.
6. **Summary & Conclusions.** Write a brief paper (no more than 3 double-spaced pages, excluding references) in APA format that addresses the following:
 - a. Eligibility and resources notes. Include any information that you feel is needed to help explain your findings, such as any assumptions you had to make to determine eligibility or difficulty you experienced in finding resources.
 - b. The bottom line: What can you conclude from your examination of expenses and resources? Is this a family that can meet its basic needs with help? Why or why not?
 - c. Your learning: What new insights did you gain and/or suspicions did you confirm about the social welfare system in doing this assignment?
 - d. References: List the sources of information you used to complete this assignment, including websites and personal communication.

Students will share their findings with one another in class on November 2, 2009 to compare what they learned. Printed materials should be submitted to the instructor at the end of class to meet the assignment deadline.

Grading Guide:

- 14-15 pts:** Reasonable household expense estimates are consistently used. Public and private sector sources of assistance were thoroughly researched. Findings are well explained, conclusions reflect findings and student identified new learning.
- 12-13 pts:** Some household expense estimates are off and/or public and private sector sources of assistance were overlooked. Summary and conclusions section lacks important detail.
- 11 pts or Fewer:** Expense estimates are way off and significant sources of assistance were overlooked. Generally speaking, submitted materials reflect little care and effort put into the assignment.

Work on this assignment is strictly independent. Students may not receive help from one another. Honor code is in full effect.

ASSIGNMENT: Policy Brief/Testimony

DUE: **September 28** (Abstract)
November 30 (Written policy brief)
November 30 or December 7 (verbal testimony and legislative panel)

You must choose a bill that is either currently before the North Carolina legislature, or another state legislature, or that has been considered within the last 2 years.

1. Write a **policy brief** that (a) educates policy makers about the issue, and (b) provides evidence and arguments in support of or opposition to the bill and.
2. Present key findings from the policy brief in class in the form of a **mock expert testimony** before a legislative panel or committee.

The bill must address an issue that impacts the quality of life for a disadvantaged group of people. Students will submit a one paragraph abstract by **September 28, 2009** that:

- Identifies the bill and provides a web link to it;
- Identifies the student's position (for/against); and
- Includes a brief justification for why the bill affects an important social welfare issue;

Policy Brief:

The purpose of a policy brief is to educate legislators and other decision-makers about an important issue that is the subject of the bill that you either support or oppose. The policy brief should be factual, evidence-based and logically tied to and supportive of the mock testimony you will provide. In other words, it is the substance that backs up your testimony.

Use Blackboard and do your own research to understand how policy briefs are written. The definition of a policy brief is *a document which outlines the rationale for choosing a particular policy alternative or course of action in a current policy debate*. In general, a policy brief has the following characteristics, which should be reflected in what you submit:

- **Concise** – legislators will not read lengthy, verbose reports;
- **Timely** – addresses an issue of current public concern;
- **Action-oriented** – problem can clearly be addressed through legislation;
- **Evidence-based** – evidence is cited and analyzed;
- **Professional** – rational, without insulting, divisive or inflammatory rhetoric;
- **Feasible** – a problem(s) that can actually be solved or improved;
- **Accessible** – free of jargon; clear, understandable language;

The **policy brief** should be **4-7 pages** (any space format) in length, including charts, tables and graphs but excluding references. For this assignment, with the exception of in-text and bibliographic references, APA format is waived. Look at examples of briefs to see how they are formatted to look professional, accessible, and interesting. If it would be helpful, we can spend some time on this in class as well.

Sources of background information and supporting data

Like any expert preparing a policy brief to support your legislative testimony, you will rely primarily on the evidence generated by sound research on your topic. For your policy brief, you must rely on scholarly sources, using AT LEAST:

- 4 articles published in peer-reviewed research journals. If you are unsure whether an article is from such a journal, ask the instructor.
- 3 reports published by at least two think tanks or philanthropic and/or research organizations (e.g., Kaiser Foundation, Robert Wood Johnson Foundation, Children's Defense Fund, Heritage Foundation, American Enterprise Institute, Institute for Women's Policy Research, Commonwealth Fund, Brookings Institution, Urban Institute, Annie E. Casey Foundation, Families USA).
- 2 substantive reports from governmental agencies. These may be generated by federal or state sources. Good federal sources for social welfare data include: U.S. Census Bureau, General Accounting Office, Centers for Disease Control, Office of Management and Budget, Congressional Budget Office, National Institutes of Health and Mental Health, Department of Health and Human Services, and its constituent agencies.

You may use more references than these **minimum** requirements, but **all** cited material must be drawn from these scholarly sources. "Popular culture" sources are not acceptable, such as newspapers, websites, blogs and magazines. A reference page in APA format should be included.

Paula Hinton, a fabulous reference librarian at the Davis Library, has created a website of sources useful for securing social welfare policy materials. You may access this website at:

<http://www.unc.edu/~pphinton/swpolicy.html>

In addition, a document entitled "**Scholarly Sources**" can be found on Blackboard under "Course Documents". This contains several web links to government and foundation data and research sites.

Mock Expert Testimony

Students will make verbal presentations of the key findings from their policy briefs to fellow students who will act as legislative panel or committee members in class on **November 30 or December 7**.

Preparing your Testimony

You will need to make the logical, financial, and emotional case for your perspective on the proposed legislation. You have the difficult task of persuading a body of individuals who generally will lack knowledge and experience in your subject area. As such, you must try to avoid jargon, be clear and concise, persuasive and authoritative. As such, you must try to avoid jargon, be clear and concise, persuasive and authoritative. Your goal is to obtain or block passage of legislation which will affect the lives of your clients.

You must inform the mock legislative panel a copy of the bill you are addressing no later than **November 23, 2009** and a statement of whether you will oppose the bill. This information can be emailed.

Giving your Testimony

You will have no more than **5 minutes** to give your testimony, followed by up to **5 minutes** of questions and answers from the legislative panel. You **MUST** practice your testimony in advance to ensure that you will not exceed the time limit, or fail to adequately use the opportunity to address the legislators. Like real legislators, your panel may or may not have knowledge of your subject area. Your job is to present your testimony in a compelling way.

Legislative Panel Role

You will play the role of a legislator hearing testimony on two bills from fellow students. Your job will be to question your peers. Your questions should be thoughtful and probing. In playing your role as a legislator, you **oppose** the position supported by the person testifying before you, regardless of your personal feelings about the issue. You will prepare two thoughtful, well-considered questions for each expert who testifies before you. You may raise any concerns or questions related to the expert's testimony, or draw on your own knowledge of the subject.

You should submit an emailed or hard copy of your questions to the instructor on the day of the testimony.