

The University of North Carolina at Chapel Hill
School of Social Work

Course

Number: SOWO 266 (also DENT 607, FMME 297, HPAA 607, MEDI 297, MEDI 497, NURS 607, HMSC 607)

Course Title: Aging and Public Policy

Semester: Spring 2000; Mondays, 6:00 – 8:50 p.m.

Faculty: William Lamb, MSW, MPA UNC Institute on Aging
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Faculty will present lectures and provide readings in selected areas. In addition, guest lecturers will be invited to present federal, state and local perspectives on emerging aging policy issues.

Description: Course is an advanced policy curriculum. Students will analyze public policy issues resulting from the growth of the older adult population including an in-depth analysis of a selected emerging issue.

Objectives: Upon completion of the course students will be able to demonstrate the following:

1. An understanding of policy-making processes at federal, state, and community levels
2. Application of a theoretical framework for analyzing public policy
3. An understanding of the profile the older populations at the national, state and community levels and an ability to identify the major social, economic, and health conditions facing the elderly
4. An ability to review current policies and programs; assess assets and liabilities of current policies and note implications/issues for development of future policies
5. Knowledge of aging and public policy issues as they pertain to diverse, special needs or marginalized populations

6. An understanding of other national approaches to addressing public policy issues and aging.

Required Texts (available at the student bookstore):

Hudson, Robert. (1997). The Future of Age-Based Public Policy. Baltimore: The Johns Hopkins University Press.

Saxon, John and McCann, Michael. (1996). The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government.

Steckenrider, Janie and Parrott, Tonya. (1998). New Directions in Old-Age Policies. Albany: State University of New York Press.

Additional Recommended Readings (available at noted websites, provided to students by instructor or via course packs):

2000 Report of the Aging Study Commission. North Carolina General Assembly

A Long Term Care Plan for North Carolina. (2000). Produced by the NC Institute of Medicine. <http://www.nciom.org>

Duncker, Alfred and Greenberg, Saadia. (1999) "Profile of Older Americans: 1999" Administration on Aging, US Department of Health and Human Services
<http://www.aoa.gov/aoa/stats/profile/>

"Gender, Race & Class: Enduring Inequities in Later Life—A North Carolina Perspective" (2000) Prepared by the UNC Institute on Aging for the 5th Annual Summer Symposium on Aging <http://www.aging.unc.edu/infocenter/resources/2000/grcfacts.pdf>

Gilbert, N. and Specht, H. (1993). "A Framework for Social Welfare Policy Analysis" in Dimensions of Social Welfare Policy. Ed. by Niel Gilbert and Harry Specht. Englewood Cliffs, NJ: Prentice Hall, pg. 31-69.

Hobbs, Frank and Damon, Bonnie (1999). "65+ in the United States." Special Study produced by the U.S. Census Bureau. <http://www.census.gov/prod/1/pop/p23-190/p23-190.html>

NC Division of Aging (1999) North Carolina: A Leader in Aging--the 1999-2003 State Aging Services Plan. <http://www.dhhs.state.nc.us/aging/plan.htm>

NC Division of Social Services. Adult Protective Services and Guardianship. <http://info.dhhs.state.nc.us/olm/manuals/dss/>

Part IV: Services and Public Policy for Rural Elders. In Aging in Rural Settings. Edited by Raymond Coward and John Krout. (1998) New York: Springer Publishing Company. Pg 245-286

Silberman, Pam. (1998). Health Policy Advocacy: A Health Care Consumers Guide to the Development of Public Policy NC Public Health Awareness Program

The Legislative Process: How the General Assembly Works. NC Equity, Women's Agenda Project.

"Serving Older Adult in Rural North Carolina: Meeting the Challenge" Prepared by Luci Bearon for the UNC Institute on Aging as a Report from the NC Governor's Advisory Council on Aging's Symposium on Rural Aging held in April 2000.
<http://www.aging.unc.edu/news/publications.html>.

Sutherland, D. Dixon and Morgan, Rebecca C. "Dying and Social Policy in the New Millennium" *Journal of Aging and Social Policy*. Volume 11, Numbers 2/3 2000 Pg. 145-155.

Torres-Gil, Fernando (1992) "The Three Forces of An Aging Society" in The New Aging Politics and Change in America. Westport, Connecticut: Auburn House pg. 9-32.

Torres-Gil, Fernando (1992) "America at the Crossroads" in The New Aging Politics and Change in America. Westport, Connecticut: Auburn House Pp. 33-74

Weiner, J.M. (1996). "Can Medicaid Long-Term Care Expenditures for the Elderly be Reduced?" *Gerontologist* 36 (6) Pg. 800-811.
<http://eresources.lib.unc.edu/eid/description.cfm?EIDID=67>

NC Division of Aging. North Carolina Housing and Long Term Care Options.
<http://www.dhhs.state.nc.us/aging/housing.htm>

Course Structure:

Aging and Public Policy is a three-credit interdisciplinary course sponsored by UNC's campus-wide Institute on Aging. The course is designed to provide students in all disciplines, including graduate students and upper level undergraduates, with an understanding of the policy issues facing the nation, state and community levels of government brought about by the aging of the population. Students will learn how to critically examine public policy issues and the forces in play that effect policy development. The course's content is relevant to students who plan to work in policy making positions or who plan to work with older adults and need an understanding of the basic policy underpinnings of the major programs effecting older persons. The course is cross-listed in a variety of departments and schools, including dentistry (DENT 607), family medicine (FMME 297, 497), medicine (MEDI 297, 497), nursing (NURS 607), pharmacy (PHPR 607), physical therapy (HMSC 607), and social work (SOWO 266). The prerequisite for social work students is SOWO 101.

Teaching Methodology:

Each class will begin with a lecture by an expert or the faculty who will speak for the first hour and fifteen minutes. Guest lecturers will include representatives from state, legislative liaisons from associations like AARP, and aging advocates involved in efforts to promote effective aging policy in the state. In most cases the second half of class will consist of a seminar in which students discuss material presented in the lecture and readings and report on their policy issues. Course directors (Lamb, Altpeter, Zimmerman) will integrate the material across topics and sessions.

Class Assignments:

Class assignments and requirements include:

- Coming regularly to class, being prepared for each class session by having read required material in advance and participating actively in class discussions
- Complete an in-class mid-term examination (multiple choice, short-answer format, based on lectures and readings).
- Working with a team of other class members, students will select a bill currently under consideration by the North Carolina General Assembly. The course instructors will provide a list of possible bills. Other bills may be considered, but will need to be approved by the course instructors. The team will be expected to track the bill's progress in the legislative session, contact bill sponsors and interested principles, and report regularly in classes regarding the bill's status. Each student will be expected to take the lead in status reports at least once during the term.
- In the final class sessions each team will be expected to conduct a 20 minute presentation which addresses the purpose of the bill, costs associated with implementation, primary and secondary beneficiaries, potential unintended consequences, groups in favor and opposed and a justification for the bill's passage.
- Other class members will be expected to respond to presentations as if they belonged to a legislative body considering each proposal. Class members hearing presentations will be expected to identify any additional formal or informal information they need to adopt or reject the bills under consideration.
- Complete written policy analysis (limit of ten text pages; up to three optional pages of figures and tables; ten or more citations) related to the policy area being addressed by the student's team. It must be literature-based, use existing data (e.g, to address relevance of the issue), and synthesize relevant multidisciplinary perspectives. The paper must be well-organized and clearly written. Papers to be handed in prior to the last day of regular classes.

The proportionate value of each requirement is shown below:

| <u>Component</u> | <u>Proportion</u> |
|----------------------------------|-------------------|
| Class participation | 10% |
| Mid-term examination | 25 % |
| Regular report on aging bill | |
| Written policy analysis | 35% |
| Policy presentation | 10% |
| Reponses to policy presentations | 10% |

Grading System:

Numeric scores will be combined in their proportionate value and converted for the assignment of a final grade, using the following scale. Late assignments will be accepted and/or incomplete grades assigned in special situations, with prior approval. Students with disabilities that affect course participation may request accommodations in instructional or assignment format.

| <u>Numeric Grade</u> | <u>Letter Grade</u> |
|----------------------|---------------------|
| 94 – 100 | H |
| 80 – 93 | P |
| 70 – 79 | L |
| ≤ 69 | F |

Policy on Academic Dishonesty:

Please refer to the *APA Style Guide* for information on the attribution of quotes. All written assignments should contain a signed pledge stating, “I have not given nor received unauthorized aid in the preparation of this work.” In accordance with the UNC 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.

Class Schedule

Session 1: January 22, Developing a Policy Framework and Profiling the Older Population

Review of course requirements and introduction to the class: Faculty

Readings:

Gilbert, N. and H. Specht. (1993). “A Framework for Social Welfare Policy Analysis” in Dimensions of Social Welfare Policy. Ed. by Niel Gilbert and Harry Specht. Englewood Cliffs, NJ: Prentice Hall, pg. 31-69.

NC Division of Aging (1999) “The Demographic Imperative” in North Carolina: A Leader in Aging--the 1999-2003 State Aging Services Plan, pg. 13-21.
<http://www.dhhs.state.nc.us/aging/plan.htm>

Hobbs, Frank and Damon, Bonnie (1999). "65+ in the United States." Special Study produced by the U.S. Census Bureau.

<http://www.census.gov/prod/1/pop/p23-190/p23-190.html>

Duncker, Alfred and Greenberg, Saadia. (1999) "Profile of Older Americans: 1999" Administration on Aging, US Department of Health and Human Services

<http://www.aoa.gov/aoa/stats/profile/>

Session 2: January 29 Continuation of the Profile: Special Need Populations

Video "If These Walls Could Talk II—the Widow" Producer, Suzanne Todd, Director, Jane Alexander. Produced by Talking Walls Productions Inc., 2000

Readings:

"Gender, Race & Class: Enduring Inequities in Later Life—A North Carolina Perspective" (2000) Prepared by the UNC Institute on Aging for the 5th Annual Summer Symposium on Aging <http://www.aging.unc.edu/infocenter/resources/2000/grcfacts.pdf>

Chapter III "The Family, Ethnicity, and Older Women: Aging Policy Dilemmas" in New Directions in Old-Age Policies Albany: State University of New York Press. pg. 185-261.

"Serving Older Adult in Rural North Carolina: Meeting the Challenge" Prepared by Luci Bearon for the UNC Institute on Aging as a Report from the NC Governor's Advisory Council on Aging's Symposium on Rural Aging held in April 2000.

<http://www.aging.unc.edu/news/publications.html>

Session 3: February 5, The Place of Age Based Public Policy

Presenter: Dennis Streets, Section Chief, Division of Aging

Readings:

Steckenrider, Janie and Parrott, Tonya. (1998). "The Political Environment and the New Face of Aging Policy" in New Directions in Old-Age Policies Albany: State University of New York Press. pg. 1-12.

Hudson, Robert. (1997). "The History and Place of Age Based Public Policy" in The Future of Age-Based Public Policy. Baltimore: The Johns Hopkins University Press. Pp. 1-76.

Chapter II "Public Policy and Population Dynamics" in The Future of Age-Based Public Policy. Edited by Robert Hudson Pp. 77-104.

Torres-Gil, Fernando (1992) "The Three Forces of An Aging Society" in The New Aging Politics and Change in America. Westport, Connecticut: Auburn House pg. 9-32.

2000 Report of the Aging Study Commission. North Carolina General Assembly

Session 4: February 12, Policy Arenas and the Place of Age: Social Security

Presenter: Richard Hatch, Chair, NC Coalition on Aging

Readings:

Saxon, John and McCann, Michael. (1996). "Social Security" in The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government pg. 5-22

Yung Ping Chen. (1998). "Economic Security: Strengthening Social Security" in New Directions in Old-Age Policies. Edited by Janie Steckenrider and Tonya Parrott. Pg. 37-50.

Kingson, Eric and Quadagno, Jill. (1997). Social Security: Marketing Radical Reform in The Future of Age-Based Public Policy. Baltimore: The Johns Hopkins University Press. Pg. 117-133.

Scheiber, Sylvester Jill. (1997). "A New Vision for Social Security: Personal Security Accounts as an Element of Social Security Reform" in The Future of Age-Based Public Policy. Baltimore: The Johns Hopkins University Press. Pg. 134-143.

Session 5: February 19 Policy Arenas and the Place of Age: Medicare

Presenter: Carla Obiol, Assistant Commissioner, Department of Insurance, Seniors Health Insurance Information Program

Readings:

Saxon, John and McCann, Michael. (1996). "Medicare" in The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government Pg. 65-79.

Moon, Marilyn. (1997). "Does Medicare Make Sense as an Age Related Program?" in The Future of Age-Based Public Policy. Baltimore: The Johns Hopkins University Press. Pg. 144-155.

Brinstock, Robert. (1998). "Health Care Policies and Older Americans" in New Directions in Old-Age Policies. Edited by Janie Steckenrider and Tonya Parrott. Pg. 37-50.

Session 6: February 26, Policy Arenas and the Place of Age: Medicaid and Long-Term Care

Formulation of Policy Teams and selection of group policy issue.

Presenter: Barbara Brooks, Assistant Director, Recipient Services and Provider Relations

Readings:

Saxon, John and McCann, Michael. (1996). "Medicaid" in The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government Pg. 81-103.

Kutza, Elizabeth. (1997). "The Shifting Place of Old People in a Needs-Based Health Program" in The Future of Age-Based Public Policy. Baltimore: The Johns Hopkins University Press. Pg. 156-167.

Weiner, J.M. (1996). "Can Medicaid Long-Term Care Expenditures for the Elderly be Reduced?" *Gerontologist* 36 (6) Pg. 800-811.
<http://eresources.lib.unc.edu/eid/description.cfm?EIDID=67>

A Long Term Care Plan for North Carolina. (2000). Produced by the NC Institute of Medicine. <http://www.nciom.org>

NC Division of Aging. 1999 State Aging Services. Chapter 3. Long-Term Care in an Aging Society. <http://www.dhhs.state.nc.us/aging/plan.htm>

Saxon, John and McCann, Michael. (1996). "Long-Term Care Facilities" in The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government Pg. 183-210

Session 7: March 5, Policy Arenas and the Place of Age: Housing and Supportive Services and Mid-Term Exam

Presenter: Mary Recca Todd, NC Housing Finance Agency

Readings:

Liebig, Phoebe. (1998). "Housing and Supportive Services for the Elderly: Intergenerational Perspectives and Options" in New Directions in Old-Age Policies. Edited by Janie Steckenrider and Tonya Parrott. Pg. 51-74.

NC Division of Aging. North Carolina Housing and Long Term Care Options. <http://www.dhhs.state.nc.us/aging/housing.htm>

March 12--Spring Break

Session 8: March 19, Policy Arenas and the Place of Age: The NC Legislative Process

Demonstration of bill tracking through NC General Assembly Web-site.

Presenters: Pat Yancey, Lobbyist
Dan Gerlach, Director, NC Budget and Tax Center

Readings:

Silberman, Pam. (1998). Health Policy Advocacy: A Health Care Consumers Guide to the Development of Public Policy NC Public Health Awareness Program

The Legislative Process: How the General Assembly Works. NC Equity, Women's Agenda Project.

Session 9: March 26, Policy Arenas and the Place of Age: The Aging Network

Begin discussions of bill status by groups.

Presenters: Ann Johnson, Chair, Governor's Advisory Council on Aging
Steve Freedman, Section Chief, Division of Aging

Readings:

Torres-Gil, Fernando (1992) "America at the Crossroads" in *The New Aging Politics and Change in America*. Westport, Connecticut: Auburn House Pp. 33-74

Justice, Diane (1997) "The Aging Network: The Balancing Act Between Universal Coverage and Defined Eligibility" in *The Future of Age-Based Public Policy*. Baltimore: The Johns Hopkins University Press. Pp. 168-177

NC Division of Aging. 1999 State Aging Services Plan, Chapter 6, The Future of the Aging Network. <http://www.dhhs.state.nc.us/aging/plan.htm>

Session 10: April 2, Public Policy and the Place of Age: Work and Financial Security

Presenter: Victor Marshall, Director, UNC Institute on Aging

Readings:

Rappaport, Anna (1997). "Employer Policy and the Future of Employer Benefits" in The Future of Age-Based Public Policy. Baltimore: The Johns Hopkins University Press. Pp. 178-188.

NC Division of Aging. 1999 State Aging Services. Chapter 5. "Work and Financial Security". <http://www.dhhs.state.nc.us/aging/plan.htm>

McCann, Michael. (1996). "Age Discrimination" in The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government Pg. 119-134.

Session 11: April 9, Public Policy and the Place of Age: Elder Rights and Protections and End-of Life Care

Presenter: John Saxon, NC Institute of Government

Readings:

Saxon, John. (1996). "Adult Protective Services" in The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government Pg. 135-146.

Mason, Janet. (1996). "Guardianship" in The Law and the Elderly in North Carolina, Second Edition. The University of North Carolina at Chapel Hill, Institute of Government Pg. 211-220.

NC Division of Social Services. Adult Protective Services and Guardianship. <http://info.dhhs.state.nc.us/olm/manuals/dss/>

Sutherland, D. Dixon and Morgan, Rebecca C. "Dying and Social Policy in the New Millennium" Journal of Aging and Social Policy. Volume 11, Numbers 2/3 2000 Pg. 145-155.

Session 12: April 16, Politics and Aging Policy

Presenters: Polly Williams, AARP Advocate and member of the Older Women's League
Mary Bethel, Staff to Senior Tar Heel Legislature, Division of Aging

Readings:

Chapter II, "Politics and Aging" in in New Directions in Old-Age Policies. Edited by Janie Steckenrider and Tonya Parrott. Pg. 75-184.

NC Division of Aging. 1999 State Aging Services. Chapter 1. Community Voices: Service Needs and Issues. <http://www.dhhs.state.nc.us/aging/plan.htm>

Session 13: April 23: Class Presentations

Session 14: April 30: Class Presentations