Social Work 644: Policies and Services for Older Adults
(last updated 9/12/14)

SW644, UM Class #21747, Section 001
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Meeting: Fridays 2:00 – 5:00pm, room 3816
Office Hours: by appointment, please email instructor to set up a time.

1. Course Description:

This course will examine social policies, problems, and trends in social programs and services for older people. It will focus major attention on the strengths and limitations of existing policies and programs related to health, mental health, income maintenance, income deficiency, dependent care, housing, employment and unemployment, and institutional and residential care. This course will provide a framework for analysis of the services provided to older people. This analysis will include how adequately needs are met in various subgroups of the elderly population and across core diversity dimensions (including ability, age, class, color, culture, ethnicity, family structure, gender (including gender identity and gender expression, marital status, national origin, race, religion or spirituality, sex, and sexual orientation). It will also include proposals for change in policies, programs, and services. Programs will be compared in terms of access to benefits and services provided to older people.

2. Course Content, Objectives, and Associated Practice Behaviors:

This course will familiarize students with social policies and programs for meeting the rapidly growing needs of the older population in our society. Policies, programs, and services for the elderly population will be examined from historical, observational, and analytical perspectives. This course will increase the student's awareness of programs and services provided through the Older Americans Act, the Social Security Act, and because of public and community initiatives. Students will be exposed to content areas that will enable them to understand aging programs that deal with social services, health care, housing, and other elements of community and institutional long-term care systems.
Upon completion of the course, students will be able to:

- Describe the evolution and organization of policies and services for older people in the context of the problems that give rise to the need for such policies and services. (Practice Behaviors 8.IP, 8.SPE, 8.CO, 8.MHS)
- Critique the strengths and weaknesses of the U.S. social service delivery system for older people. (Practice Behaviors 8.IP, 8.SPE, 8.CO, 8.MHS)
- Identify the problems impeding the development of services for older people and suggest approaches to address these challenges. (Practice Behaviors 8.IP, 8.SPE, 8.CO, 8.MHS)
- Identify criteria for assessing the success of programs for older people. (Practice Behaviors 8.IP, 8.SPE, 8.CO, 8.MHS)
- Critically evaluate alternative policies and services for older people with a special emphasis on similarities and differences related to human diversity and the dynamics of oppression and privilege. (Practice Behaviors 4.IP, 4.SPE, 4.CO, 4.MHS, 5.IP, 5.SPE, 5.CO, 5.MHS, 8.IP, 8.SPE, 8.CO, 8.MHS)
- Discuss typical ethical concerns related to policies and services for elderly people. (Practice Behaviors 2.IP, 2.SPE, 2.CO, 2.MHS, 8.IP, 8.SPE, 8.CO, 8.MHS)
- Use a political economy framework to critically evaluate policies and services provided to older people in terms of such issues as privilege, oppression, diversity, and social justice. (Practice Behaviors 5.IP, 5.SPE, 5.CO, 5.MHS, 8.IP, 8.SPE, 8.CO, 8.MHS)

3. Advanced Practice Behaviors:
   This course will utilize and build upon the following Advanced Practice Behaviors:

   - **Values & Ethics**: Balance individual and community needs for appropriate and sustainable services, programs, and policies for older adults;
   - **Social & Economic Justice**: Examine the extent to which current policies and services for older adults promote or hinder social and economic justice *and* recommend strategies for improvement;
   - **Social Policy and Context**: Understand aging-related policies in historical, social, and political contexts; Understand linkages between policy and practice; Learn strategies for influencing policies at different levels (institutional, local, state, and national).

4. Relationship of the Course to Four Curricular Themes:
   - **Multiculturalism and Diversity**: analysis of differences in needs among subgroups of older adults within U.S. society and the differential application and impact of policies and services;
   - **Social Justice and Social Change**: considering issues such as the distribution of social security and other benefits, varying standards for assessing the need for intervention (e.g., protective services and guardianship), and differing outcomes for physical, social, and mental well-being.
   - **Promotion, Prevention, Treatment, and Rehabilitation**: considering the spectrum of policies and services ranging from promotion and prevention (e.g., pre-retirement programs and in-home
services) to treatment and rehabilitation (e.g., income support for those with inadequate resources and nursing homes).

- **Behavioral and Social Science Research:** inclusion of theoretical frameworks for understanding social roles, social stratification, and societal functioning among older people. The findings of research studies and evidence-based intervention relevant to the design and evaluation of policies and services for older adults will also be included.

5. **Relationship to Social Work Ethics and Values:**
This course will address social work values and ethics in terms of the extent to which policies and services adequately meet the needs of older people. Special emphasis will be given to ethics and values around policies and services that provide older adults with autonomy.

6. **Intensive Focus on Privilege, Oppression, Diversity, and Social Justice (PODS)**
This course integrates PODS content and skills with a special emphasis on the identification of theories, practice, and/or policies that promote social justice, illuminate injustices, and are consistent with scientific and professional knowledge. Through the use of a variety of instructional methods, this course will support students to develop a vision of social justice, learn to recognize and address mechanisms that support oppression and injustice, work toward social justice processes, apply intersectionality and intercultural frameworks, and strengthen critical consciousness, self-knowledge, and self-awareness to facilitate PODS learning.

7. **Course Design**
This course will include short lectures with discussions and student presentations. These lectures and presentations will address specific policies and programs/services for older people within both an historical and a contemporary context. Students will also engage in the process of analyzing selected current aging policy issues, under the supervision of the instructor. The readings and assignments are designed to enhance students’ abilities to engage in public policy debate, assess the impact of current policy proposals, and identify solutions that represent interests of older adults. Assignments will provide an opportunity to develop and demonstrate skills in communications to influence public policy.

8. **Required Text and Software:**

**Required:**

**Recommended** (on reserve):
The following texts are not required, but will be helpful for your policy proposal. They are on reserve at Shapiro University Reserves (Askwith Media Library) for short-term loan:


- **Students are expected to keep up with Aging-related news**, which will be uploaded by students and the Instructor throughout semester. Keep up on aging news with Current Awareness in Aging Research (CAAR) E-Clippings (a free email subscription)
- Additional readings and electronic materials are assigned throughout the term. These are available on CTools, in folders for each week. The CTools site also provides information for additional references and resources.

**Students are expected to read the assigned readings prior to class.**

9. **Organization of the Course: Schedule, Assignments, Participation**
The class will include lectures, discussions, and student presentations. Lectures will provide a point of departure from basic policy foundation information included in the readings and update the historical context of issues with discussions about the most relevant current issues in gerontological social work practice today. Required reading and assignments are structured to increase students’ understanding of current programs and policies, and to develop skills in the practice of successful systems change.

**Summary of Assignments and Grade Break-down**
- Response Papers (4 Papers) 20%
- Policy Research and Portfolio (5 Papers) 60%
- Policy Presentation 10%
- Attendance and Participation 10%
# Course Schedule*

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<tr>
<th>Week and Date</th>
<th>Theme</th>
<th>Readings and Assignments</th>
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<tr>
<td>Wk 1 9/5/2014</td>
<td><strong>Course Introduction: Health and Social Care in an Ageist Era</strong>&lt;br&gt;The course objectives and assignments will be discussed. The course overview will be presented in the context of the changing demography, political, and social context of the United States. Critical policy concepts that are rooted in social values (e.g., dependency ratio, retirement age, old age) will be discussed in the context of the social construction of aging and dependency.</td>
<td><strong>Required:</strong>&lt;br&gt;None&lt;br&gt;<strong>Optional:</strong>&lt;br&gt;Text: Ch. 3&lt;br&gt;<em>Nikkei Review</em> (8/28/14)&lt;br&gt;<em>Estes</em> (2001), Social Policy &amp; Aging, Ch. 1,2,7</td>
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<td>Wk 2 9/12/2014</td>
<td><strong>Policy and Practice Linkages for Geriatric Social Work</strong>&lt;br&gt;How does—and should—geriatric social work practice inform policy? How do health and social policy inform social work practice with older adults? <strong>What are the best strategies for making change at different levels?</strong></td>
<td><strong>Required:</strong>&lt;br&gt;Text: Ch. 1, 2&lt;br&gt;<strong>Optional:</strong>&lt;br&gt;<em>Chambers</em> (2000), Chapters 1,4&lt;br&gt;<em>Gilbert &amp; Terrell</em> (2002), 55-88</td>
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<td>Wk 3 9/19/2014</td>
<td><strong>Income Maintenance 1: The Social, Political, and Historical Context of Social Security</strong>&lt;br&gt;Historical perspectives of economic policies and income security for older adults will be discussed, including (a) a review of the OASDI program, (b) benefits eligibility, and (c) the impact of poverty on the elderly. We will discuss critical values and key assumptions in the origin and transition of social security. Be prepared to discuss the politics of social security viability and strategies to balance equity with program sustainability.</td>
<td><strong>Required:</strong>&lt;br&gt;Text: Ch. 4,5&lt;br&gt;<em>Edwards et al.</em> 2012&lt;br&gt;<em>Reno &amp; Lavery</em>, 2005&lt;br&gt;<em>Reno &amp; Walker</em>, 2011&lt;br&gt;<strong>Optional:</strong>&lt;br&gt;<em>Huffington Post</em> (9/9/14)</td>
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<td>Wk 4 9/26/2014</td>
<td><strong>Income Maintenance 2: Pensions – Public and Private</strong>&lt;br&gt;We will discuss interlocking systems of oppression in aging policy. We will consider strategies that have emerged from individual and institutional levels to overcome poverty in later life, such as pensions and retirement savings. The changing role of pensions (for public and private sector employment) as an income maintenance</td>
<td><strong>Required:</strong>&lt;br&gt;Text: Ch. 7&lt;br&gt;<em>Hudson</em>: “Pensions”&lt;br&gt;<em>Brookings</em> (8/18/14)&lt;br&gt;<em>MarketWatch</em> 8/20/14</td>
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*SW 644 Syllabus Page 5*
| Wk 5  | 10/3/2014 | **Insurance and Health Care 1: The Origins and Reform of Medicare**  
In this class, we will discuss how Medicare has changed since its origination and how it is affected by health care policies such as the Affordable Care Act. The shifting public perception of Medicare-as-entitlement will be discussed, as will major changes in Medicare legislation (2010 health reform, BBA, MMA, ACA), privatization, and cost-containment strategies. | **Required:**  
Text: Ch. 10  
Kaiser: Primer on Medicare Financing  
Kaiser – ACA Changes  
Barth et al. 2011 – ACA  
*New York Times* 8/27/14 & 8/31/14  
*Forbes* 8/31/14  
*Washington Post* 7/28/14  
**Optional:**  
*Washington Post*, 8/7/14  
W. Potter, 8/25/14  
**Policy Paper: Step 2 Due** |
| Wk 6  | 10/10/2014 | **Insurance and Health Care 2: Medicaid, Dual Eligibility, and Long-term Care Coverage**  
We continue our conversation on insurance and healthcare in older adulthood, concentrating on Medicaid’s relationship with Medicare (dual eligibility) and the role of Medicaid in long-term care in the US. Funding for long-term care will be discussed using international comparisons and context. Legislation to contain costs and/or expand coverage (Medicare 2010 Health Reforms, ACA) will be discussed, as well as the historical and current socio-political context of entitlements versus means-tested programs and policies concerning older adults. | **Required:**  
Text: Ch. 11, 12  
Kaiser Report on Dual Eligibles  
De Nardi et al. 2012  
SKIM: National Academy of Social Insurance  
**Optional:**  
*PPAR Articles* (Ctools) |
| Wk 7  | 10/17/2014 | **The Aging Network and Aging in Place: Housing, Transportation, and the Built Environment: Part 1** | **Required:**  
O’Shaughnessy (2011) |
| Wk 8  10/24/2014 | **The Aging Network and Aging in Place: Housing, Transportation, and the Built Environment: Part 2**  
This week we discuss challenges, such as housing, transportation, and infrastructure, for older adults aging in community settings. Examples of policies and services to address these challenges at local, state, national, and international levels will be described within cultural and political context.  
**Required:**  
- Golant (2008)  
- Center for Housing Policy (2009)  
- GAO (2005)  
- Keigher, page 877  
- Pynoos et al. (2008)  
- MarketWatch (Hoak) 9/2/14  
- NYT (Severson) 8/7/14  
**Optional:**  
- ABC News: Schneider, 2014  
- HealthDay 8/13/14  
- Post-Crescent (Anderson) 8/24  |

| Wk 9  10/31/2014 | **Workforce and Productive Aging**  
The roles of older adults differ between societies, within societies, and over time. This week we examine the social and health-related benefits and drawbacks of work—paid and volunteer—in “retirement age”. We examine ways in which social support promotes or challenges older adults’ engagement in productive roles.  
**Required:**  
- Text: Ch. 6  
- PPAR Older Workers Report (Skim)  
- US Census ACS 1.2013  
- USA Today 9/6/14  
- Washington Post (Marte) 8/25/14  
- Huffington Post 4/24/11  
- LA Times (Fleishcher), 8/5/14  
**Optional:** |
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<tr>
<th>Wk 10</th>
<th>10/7/2014</th>
<th><strong>Gerontology Society of America (GSA) Meeting</strong> – No Class</th>
<th>ADEA Legislation ; Koff &amp; Park, Ch. 9</th>
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<td>Wk 11</td>
<td>11/14/2014</td>
<td><strong>Caregiving and Intergenerational Approaches: Part 1</strong>&lt;br&gt;We will discuss the challenges in differentiating between “formal” and “informal” care for older adults in the US and globally. We will discuss trends in unpaid care and family caregiving—both for and by older adults. The causes and consequences of this care on individuals and families will be discussed from a social justice perspective.</td>
<td><strong>Required:</strong>&lt;br&gt;Feinberg (PP&amp;AR), 2014&lt;br&gt;Bruhn &amp; Rebach Ch. 13&lt;br&gt;Metlife Report on Caregiving Costs&lt;br&gt;Li &amp; Rafferty, page 915&lt;br&gt;&lt;br&gt;<strong>Optional:</strong>&lt;br&gt;Reuters, 8/19/14&lt;br&gt;Huffington Post, 8/26/14&lt;br&gt;NYT (Span) 8/4/14&lt;br&gt;&lt;br&gt;<strong>Policy Paper: Step 4 Due</strong></td>
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<tr>
<td>Wk 12</td>
<td>11/21/2014</td>
<td><strong>Caregiving and Intergenerational Approaches: Part 2</strong>&lt;br&gt;We discuss current community-based initiatives and national policy strategies to promote intergenerational partnerships. Divisive and intergenerational strategies to promote change are compared, with an emphasis on the social context of stakeholders and affected populations.</td>
<td>(Continue any remaining readings from last week)</td>
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<td>Wk 13</td>
<td>No class</td>
<td>11/28/2014</td>
<td>No Class – Thanksgiving Break</td>
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<td>Wk 14</td>
<td>12/5/2014</td>
<td><strong>Future of Old Age Policy in Health and Social Care</strong>&lt;br&gt;Course wrap-up</td>
<td><strong>Required:</strong>&lt;br&gt;Text: Ch. 9,13&lt;br&gt;NPR Morning Edition, 8/27&lt;br&gt;BBC News 8/29/14</td>
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<td>Optional:</td>
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| *Science* (Irwin) 8/19/14  
*JS* 8/23/14  
*Forbes* 8/12/14 |

*Additional required and recommended readings will be added by September 10th.*  
Please be sure to take note of your **presentation date**. These are scheduled throughout the semester.
Assignments:

Format for Written Assignments
All papers must be typewritten in 12-point font, double-spaced, page-numbered, with 1" margins on all sides. One point will be deducted from each assignment that is not in the required format. Your name should be easily identifiable in the file name (uploaded to CTools). Please include a separate title page as the first page of the paper. The title page and references do not count toward the page count limit for assignments. The title page should include a title of the paper, the student’s name(s), the instructor’s name, and submission date. Papers should be submitted via CTools “Assignments”, which will track the date and time of submission. Papers should not be submitted via email or in hard copy. Please proofread all papers carefully for spelling, punctuation, grammar, organization, and flow. In short: Do not submit a first draft.

A Note on Written Assignments
All ideas of others must be properly cited whether you use a direct quote or paraphrase. Failure to properly cite others’ ideas could result in a charge of plagiarism and a “zero percent” on the assignment. Please use endnotes with in-text numerical citations in superscript form. The end note list should be placed at the end of the document (and will not count toward the page count for the assignment). You should follow APA style guidelines for the endnotes list in the Policy Brief or Position Paper (example provided on CTools site). Direct quotes must have the specific source and with page number(s) listed in the endnote citation. Quotations longer than four typewritten lines must be single-spaced and indented. Quotes should be used very sparingly in these assignments. The goal is for you to build your own writing skills and your ability to integrate and summarize knowledge and ideas. Footnotes may be used where appropriate to further explain a concept or issue. You should keep a copy of each paper submitted.

This course will adhere to the LS&A statement on academic integrity: “Conduct, without regard to motive, that violates the academic integrity and ethical standards of the College community cannot be tolerated. The College seeks vigorously to achieve compliance with its community standards of academic integrity. Violations of the standards will not be tolerated and will result in serious consequences and disciplinary action.” Plagiarism is a violation of the Code of Academic Conduct. Any assignment that has been plagiarized—in full or in part—will receive a grade of “0%”, which—for larger course assignments—could result in a failing course grade. Plagiarized assignments cannot be re-written for academic credit. It is the responsibility of all students at the UM SSW to understand what constitutes plagiarism.

Requirement 1: Reflection papers (4 papers total, 20 points possible)

Four reflection papers are required, which comprise a substantial portion of your final grade (20%). These can be turned in at any time during the semester before the final day of classes, but you will get more feedback from the instructor if you submit them within 1-2 weeks following the related course. The papers should be three pages maximum (excluding references and title page), Times New Roman
font (size 12), double-spaced with 1” margins. The related course session should be clearly identified on the assignment, along with your name (saved in the title of your document uploaded to CTools). No more than one paper should pertain to a particular session (of the 12 eligible sessions, listed below) so you demonstrate expertise in a diversity of areas.

There are four required reflection papers, due over the course of the semester. You are welcome to choose the topic and are encouraged to take a specific stance for your reflection papers. As you read course materials, many different types of observations could be made:

- You notice that some readings frame an issue as urgent, while other readings do not seem concerned about the issue. What might explain the different perspectives? How might it tie to certain ideas and values (e.g., ageism, individualism)?
- How could beneficial standard practice (as discussed in the readings) be promoted through policy? How could this benefit older adults and their communities? What might be some obstacles in the way?
- Consider a specific piece of legislation discussed in the readings. Does it benefit some seniors more than others? How would you change to make it more socially just?

The topics below are only suggestions to get you started; you are welcome to write on a different topic that compels you. Paper topics should relate to material from the corresponding classes. Please keep summarization of the readings to ½ page maximum and keep writing as concise as possible (avoiding the use of unnecessary words and long quotations). Beyond summarizing the readings, the majority of the reflection should include an original stance on the policy question/problem posed.

The four reflection papers should each address a specific area within relevant course content, including:

Session 1: Ageism or Social construction of aging, dependency, or retirement
Session 2: Policy/practice linkages; micro/macro connections
Session 3: Social context of social security, viability/sustainability, policy strategies and politics
Session 4: Role of programs and policies in aiding or maintaining poverty and inequality among older adults; viability and challenges of private pensions; impact or social context of specific policies (such as ERISA); international comparisons - - linkages between social values and conditions or policies
Session 5: Policy strategies to target cost-containment in Medicare; anticipated changes in cost and coverage for population subgroups through ACA legislation
Session 6: Medicaid/dual eligibility; social context of means-tested policies or programs
Session 7: Policies and programs to promote independent living/aging in place; aging in place out of choice versus necessity
Session 8: Housing, transportation, and other strategies to promote aging-in-place
Session 9: Post-retirement work (out of choice vs. out of necessity); productivity in late-life
Session 10: Gerontological Society of America: role of this versus other organizations in linking policy, practice, and research
Session 11: Social context of formal versus informal care; international policy and practice comparisons; financial implications of care-giving and care-receiving
Session 12: Policy strategies to promote intergenerational community-based activities
**Requirement 2: Policy Research and Portfolio (5 papers total, 60 points possible)**

For this course you will conduct a comprehensive policy analysis project on a current social welfare issue or problem that affects older adults. **You are welcome to work on this project independently or in groups of 2 persons.** The following is a list of steps (and corresponding deadlines) that describes the components, requirements, and expectations of your advocacy project.

You will need to look beyond the literature reviewed in class to do this assignment. The literature, both empirical and conceptual, will provide necessary information and will enhance your understanding of the issues. The literature can also be used to support your arguments throughout the steps in your assignment. Therefore, this work will provide a base of knowledge and will inform the critical lens from which you will be able to build your position/policy response.

You should be able to develop a **policy brief** after completing the work for Steps I & II. That said, the intensive work really relates to acquiring knowledge about a given problem/policy. Once that groundwork is done, the writing will be easier. But in order to write solid/productive statements, you will need to become experts on this issue, quickly. This process reflects what can happen in the “real” world of policy making, as new legislation can be introduced quickly, with little warning, and move quickly so that you may only have a matter of weeks to analyze the proposals. Thus your initial workload will focus on planning and executing the information-gathering stage, including dividing work (if working in a team). It is helpful to work with student colleagues to compile and critically analyze this information and to distill this into the products described above.

**Step 1: Identify and define the problem (10 points possible; due by Week 3, 9/19)**

**Identify a social welfare issue/problem of interest to you** that impacts older adults. You need to think about and understand both the policy itself and the social problem it is meant to address. Thus, the first step is to **summarize your knowledge of the problem.** You might find the following list helpful in this process or you might choose to present information in an alternative format to enhance the clarity and organization of information.

1. **Construction of the Problem:** *How is the problem defined/constructed in legislation/literature/media?*
2. **Assumptions:** *What assumptions made about the problem, population, targets for change?*
3. **Key Stakeholders:** *Who defines this as a problem and what are their interests in defining it this way (does any group “own” the problem)?*
4. **Social Construction:** *Are there other ways to construct the problem? If so, what are they?*
5. **State of the Problem:** *What is the status of the problem? (e.g. is it a crisis? Consider incidence, prevalence, severity, contributing factors)*
6. Population Subgroup of Interest: *Whom does the problem affect?*

7. Relevance/Implications: *Why should we care about it? What are the potential consequences of the problem if left unchecked?*

**Step 2: Research any policy related to the problem (10 points possible; due by Week 5, 10/3)**

In this step, you will determine what efforts (if any) have addressed the stated problem, either currently or previously. This will inform your policy response. The existing policy may, in fact, be a part of the problem as you have defined it. After this research is complete, you should be able to provide an initial description of the policy and this can be molded into the first written assignment – the policy brief.

1. Introduction of the Policy:
   a. Goals and objectives
   b. What were/are the critical conflicts and how were they resolved/not resolved
   c. What must be done (form of benefits and services), by whom (administration and service delivery), and for whom (eligibility criteria)

2. Identify Agency and Policy Sanctions:
   What government agency is responsible for the policy regulations?

3. Current and Historical/Cultural Context and Timeline:
   a. What was the foundation on which this policy was built? In other words, what historical policy precedents influenced the proposal for this new or modified policy?
   b. Consider the timeline of critical historical transition points for the process (e.g., related legislation introduced, relevant court decisions).
   c. When did the policy become effective (on paper and/or in practice)?

4. Defining the Constructs and Targets of Change:
   a. Definitions: How are key constructs and ideas defined?
   b. Identify and describe the target of change as well as the beneficiaries of the policy
   c. What other groups might be affected by this policy, either adversely or positively?

5. Implementation:
   Identify and describe potential or existing implementation concerns.

**Step 3: Stakeholder Analysis (10 points possible; due by Week 8, 10/24)**

The purpose of this assignment is to identify and describe groups/persons with a stake/interest in this problem/policy and any changes proposed. You want to try to identify groups who would be in support of—and against—what you are proposing. You will probably find some overlap between this step and the previous steps. You will probably also discover information about various groups affected by the problem/policy, so it will behoove you to bookmark/take note of these for other assignments.

**Key Stakeholders:**
   a. Who proposed the legislation or filed suit?
   b. What individuals and groups supported the policy (also key sponsors if legislation or amicus briefs if a court decision)? What were the reasons for support/opposition?
c. What are the vested interest groups on this problem, pro and con?
d. What are their actual vested interests?
e. Who are the key legislators/judiciary?
f. What administrative departments are involved (regulations, implementation, etc.)?
g. Who is affected by this policy (targets for change, beneficiaries, etc.)?

Step 4: Policy Brief (10 points possible; due by Week 11, 11/14)
For this assignment, you will conduct a critical evaluation of the actual policy, including key recommendations. This assignment requires that you develop and defend your position based on evidence and logic. Such an evaluation must be informed by a solid knowledge of the relevant social problem, understanding of the actual policy, and knowledge of the policy history (developed in the previous assignments). All of these pieces will assist you in building a solid argument for or against the policy. You might find it helpful to look ahead at the guidelines for the Policy Portfolio (Step 5) before getting started.

1. Critique:
   a. What are the core values (implicit and explicit) undergirding this policy; how does the policy reflect a particular discourse or ideology?
   b. What assumptions are being made about the problem (about targets for change, etc.) in designing the policy in this way? What inconsistencies exist within the policy?
   c. What is the level of analysis – does the policy focus on individuals, communities, families, providers, society, etc.?
   d. What are the key conflict areas in the policy debate and what forces/factors shape this debate?
   e. What are the intended and unintended consequences of this policy approach?
   f. How does this policy reflect (or not) the values of social work?
   g. What do we know about the effectiveness, efficiency, adequacy, equity, and appropriateness of the policy as it has been implemented?
   h. Are there other ways of thinking about this problem that might lead to a different response? Explain (this question leads into the next section).

2. Recommendations:
   a. Describe your recommended course of action (modification, repeal, new policy, etc.) and defend this approach:
      i. Describe what the new policy should look like.
      ii. Why are you doing it this way and how will it improve things?
      iii. How do your recommendations fit with the policy history?
      iv. What assumptions are you making about the problem, target groups, etc.?
      v. What values are you emphasizing?
      vi. How are you going to defend your own assumptions against critiques?
         Anticipate the arguments against your recommendations.
b. Don’t forget to consider the following when making your recommendations:

i. Vested interest groups, pro and con;
ii. Implementation issues;
iii. Resources;
iv. Unintended and intended consequences;
vi. Impact on various groups/stakeholders (diversity issues, disparate impact potential);
vii. Social Work values (PODS); and
v. Effectiveness, efficiency, adequacy, equity, and appropriateness

The above outline is meant as a guide in terms of the kind of information you must gather and questions you must ask to understand the problem and the policy and to make any recommendations for change.

Step 5: Final Policy Portfolio (20 points possible; Due Friday, December 12 at 2:00pm)

Incorporate feedback from peers and from the instructor to compile a Policy Portfolio, which is a culmination of the previous 4 assignments. All duplicative sections should be removed so the assignment reads as a concise and informative position paper, which is self-standing (does not require reference to alternative materials). While not required, you might find the following format to be a helpful way to organize your portfolio:

- **Cover Page:**
  Include your name, title of the policy issue, and a summary statement briefly describing the problem and your proposed solution;

- **Problem Statement:**
  Describe the nature of the problem, using data/literature/outside research. This information should be conveyed in a manner that grips the reader while avoiding apparent bias;

- **Solution:**
  The discussion of action needed to address the problem can include an identification of the barriers that prevent the problem from being solved and reasons that the policy hasn’t (or shouldn’t) be changed. Consideration should be given to fiscal and social impact, forces related to privilege and oppression, as well as the impact on majority, minority, and other subpopulations of older adults when relevant.

  The solution should describe the specific recommended policy change needed and how this change should be implemented (if at all). The solution section should include a detailed description of how the solution will be implemented so the reader can judge its practicality and effectiveness. The proposed solution should address the issues identified in the problem statement section. Data and/or arguments that delineate the cost and benefits of the proposed solution—and that justify its implementation—should be included.

- **Strategy:**
  The paper must include a strategy statement that indicates what actions are needed to implement the solution. Strategies may include obtaining resources or making policy changes.
Actions to achieve these may include advocacy, coalition-building, legislative or administrative actions, funding acquisition, etc.

Please upload to CTools as one single document, in either pdf or Word format. Papers will be judged on the level of effort apparent, thoroughness, breadth of analysis, and viability of proposed solution.

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**Requirement 3: Policy Presentation (scheduled throughout, 10 points possible)**

Throughout the semester, students will present to the class on their selected issue. While use of presentation software is not required, PowerPoint or Prezi is strongly recommended. The presentation should summarize and educate the viewer on the issue and recommend a proposed policy solution. The presentation should engage the audience utilizing a variety of techniques to effectively communicate information while capturing attention of the audience. Such techniques may include, but are not limited to:

- Pictures/Images
- Charts, tables, graphs
- Short video
- Design elements

The presentation must be no longer than 10 minutes, with 5 additional minutes allocated for question/answer. If you have worked together with a student colleague to develop the policy project, you are welcome (but not required) to present the same day. Presentations must be done individually and must have unique content. Please keep your presentation to a maximum of 10 slides and practice for duration prior to the presentation. Be sure to bring the presentation in a flash/thumb drive to class and come a little early to class to upload the presentation.

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**Requirement 4: Class Attendance and Participation (throughout, 10 points possible)**

The final course grade is based on the student’s performance in the class, including performance on assignments as well as in-class participation. Each student will receive a grade for general class participation (10%) during class time where we are discussing various policies and the assigned readings/topics. Students should be vigilant in keeping up with the readings and current policy issues and be prepared with questions/comments for class discussion.

The instructor will assess student attendance, participation in class discussion, and understanding of assigned readings and lectures. Students are expected to contribute to class discussion with questions, analysis, and examples that relate to course topics. Full participation in class discussion and no more than one unexcused absence are required for full credit. One point may be deducted for each absence or tardiness thereafter (*Note: an excused absence requires an email alerting the instructor of the absence a minimum of 24 hours prior to class and provision of subsequent documentation via email*).