

**School of Social Service Administration**  
**University of Chicago**  
**Winter 2005**

**SSAD 490 (00)/PPS 374 Aging & Public Policy**

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**Tues 2:00 - 4:20 P.M.**  
**Office hours: By appointment**

**Course Description**

This course will identify and analyze the fundamental problems of policy in an aging society. It examines changing population demographics and reviews social science theories as they help us understand societal aging. Issues related to diversity (e.g., social class, gender and race) as they influence the experience of aging will also be examined. The course begins with an examination of the historical development of the social role of older persons and the development of age-based public policy. It also focuses on specific issues such as the politics of aging, income security, health care, and long-term care.

**Course Reading:**

**Course Reading Packet:** SSA 490 can be purchased in the SSA Production Room.

**Textbook:** "Controversial Issues in Aging" (1997) by Andrew E. Scharlach & Lenard W. Kaye (eds.) Allyn & Bacon, Needham Hts., MA. It can be purchased at the Co-op Seminary Bookstore (58th St. & University)

**Course Requirements:**

**Readings:** Students are required to read all assigned material and should be prepared to discuss the reading material assigned for each class. Students are also expected to actively follow current policy issues as reported in the national media.

**Class Attendance and Participation:** Active discussion of the ideas contained in the readings and lectures as well as class attendance and participation in class exercises are central to the success of this course. Excessive absences (TWO or more classes) will result in a lowered grade. Students are especially expected to attend classes for which speakers, presentations, or group activities have been scheduled.

**Plagiarism or Cheating:** It is contrary to justice, to academic integrity, and to the spirit of intellectual inquiry to submit the statements or ideas of work of others as one's own. To do so is plagiarism or cheating, offenses punishable under the University's disciplinary system. Because these offenses undercut the distinctive moral and intellectual character of the University, they are taken very seriously and punishments for them may include permanent expulsion from the University. Proper acknowledgment of another's ideas, whether by direct quotation or paraphrase, is expected. In particular, if any written source is consulted and material is used from that source, directly or

indirectly, the source should be identified by author, title, and page number. These instructions also apply to internet resources. Any doubts about what constitutes "appropriate use" should be addressed to the instructor. Source: [http://www.uchicago.edu/docs/studentmanual/academic\\_honesty.html](http://www.uchicago.edu/docs/studentmanual/academic_honesty.html)


**Assignments**

- Each student will be asked to complete a series of assignments:
  1. Presentation of testimony on a private personal savings account approach to Social Security reform. This will be done orally to the class and a written copy will be turned in to the instructor.
  2. A briefing paper that describes a particular policy/service area in aging, with preference for an area not covered by material in the course. Topics could include housing policy and services for an aging population, pensions, transportation, social services, mental health, caregiver support, kinship care, end-of-life care, etc.
  3. A class presentation of your briefing paper and a description of this issue in a comparative international context.
  4. Each student will be assigned a topic for debate (2 each), and will be responsible for leading the class discussion on the topic. Students will be expected to develop a brief oral presentation with overheads (powerpoint, word, etc.) outlining their position and providing a conceptual rationale and empirical evidence for their positions.
- Students are expected to have the briefing paper defined by the fourth week of the course (Jan 24th) and turn in an outline of the paper. Students will present their paper along with a discussion of the topic in a comparative context on Feb 28<sup>th</sup> and March 7<sup>th</sup>.
- The course grade will be based on class participation, presentation of testimony, quality of the debate, proposal and final briefing paper.

<b><u>Evaluation</u></b>	<b><u>Grade Weight</u></b>	<b><u>Due</u></b>
1. Class Participation	10%	N/A
2. Debate discussion & paper	20%	as assigned
3. Congressional Testimony	15%	Feb 7 <sup>th</sup>
4. Briefing Paper	40%	Feb 14 <sup>th</sup> ( <i>outlines due Jan 24<sup>th</sup></i> )
5. Class presentation	15%	Feb 28 <sup>th</sup> & March 7 <sup>th</sup>

**NOTE:** Depending on the class size, these assignments may be done either individually or in groups. We will discuss the logistics of these assignments on the first day of class.

**COURSE OUTLINE AND READING**

**NOTE:** The readings are in several forms:  
 The numbered readings (1,2,3, etc.) are from your coursepack.  
 The readings with this camera  icon are in electronic format which will either be emailed to you, or you will be asked to download them from websites.  
 The readings marked TEXT are from the Text book assigned. Each student will be a discussion leader for at least one of these readings.  
 Additional material may be copied or emailed to you as the quarter progresses.

**Class 1.      Date: Tuesday, Jan 3:      **Demography of Aging****

**Readings:**

1. Handbook of Aging & the Social Sciences, Ch # 4: Demography of Aging: A Century of Global Change, 1950-2050. (HQ1061.H336)
2. Handbook Aging & the Social Sciences, Ch # 5: Economic & Social Implications of Demographic Patterns.  
  
☞ “Older Americans 2004: Key Indicators of Well-Being” Federal Interagency Forum on Aging-Related Statistics at <http://www.agingstats.gov/chartbook2004/slides.html>

**Class 2.      Date: Tuesday, Jan 10:      **History, Concepts, & Biopsychosocial Aspects of Aging****

3. Riley, M.W. & Riley, J.W. (1994). “Structural Lag: Past and Future.” in M.W. Riley, R.L.Kahn, & A. Foner, (eds.) Age and Structural Lag. New York: Wiley Interscience, pp.15-35.
4. Rowe, J.W. & Kahn, R.L. (1997) Successful Aging. The Gerontologist. 37(4), 433-440
5. Minkler, M. & Fadem, P. (2002). Successful Aging: A Disability Perspective. Journal of Disability Policy Studies, Vol. 12 Issue 4, p229-, 7p (EBSCO).

TEXT: Controversial Issues in Aging: section V – Ch 17. Is Gerontology Biased toward a Negative View of the Aging Process and Old Age?

VIDEO: Aging Well or Sixth Sense

**Class 3.      Date: Tuesday, Jan 17:      **Politics of Aging and the Older Americans Act****

6. Gilbert, Specht, & Terrell. (1993). A Framework for Social Welfare Policy Analysis
7. Hudson, R.B. (1997). “The history and place of age-based public policy.” In R.B. Hudson (ed.) The future of age-based public policy. Baltimore, MD: Johns Hopkins University Press.
8. Silverstein, M., Angelelli, J. & Parrott, T. (2001). Changing attitudes toward aging policy in the United States during the 1980s and 1990s: A cohort analysis. J. Gerontol. B. Psychol. Sci. Soc. Sci. 56: S36-S43.

☞ Administration on Aging & the Older Americans Act  
[http://www.aoa.gov/about/legbudg/oa/legbudg\\_oaa.asp](http://www.aoa.gov/about/legbudg/oa/legbudg_oaa.asp) &  
Layman's Guide to Older Americans Act at  
[http://www.aoa.gov/about/legbudg/oa/laymans\\_guide/laymans\\_guide.asp](http://www.aoa.gov/about/legbudg/oa/laymans_guide/laymans_guide.asp)

TEXT: Section II – Ch 7. Are the elderly benefiting at the expense of younger Americans? Ch. 8. Do the elderly really have political clout? & Section I – Ch 3: Should the Aging Network be dismantled? & Ch. 6: Should age be abandoned as a basis for program and service eligibility?

**Class 4.      Date: Tuesday, Jan 24:      Race, Gender, Social Class, & Ecology of Aging**

9. Handbook Aging & the Social Sciences, Ch # 9: Race, Ethnicity, and Aging
10. Handbook Aging & the Social Sciences, Ch # 10: The Gendered Life Course
11. Handbook Aging & the Social Sciences, Ch # 11: Stratification and the Life Course
12. Eric Klinenberg. "Race, Place, and Vulnerability: Urban Neighborhoods and the Ecology of Support." In *Heat Wave: A Social Autopsy of Disaster in Chicago*. Chicago: University of Chicago Press, 2002, pp. 79-128.

📖 Olsen, KA. (1999). Application of experimental poverty measures to the aged. *Social Security Bulletin*, 62:3, 3-19. <http://www.ssa.gov/policy/docs/ssb/v62n3/v62n3p3.pdf>

**TEXT:** section III – Ch 12: Is aging more problematic for women?

**DUE BY APRIL 21<sup>ST</sup> : OUTLINES OF BRIEFING PAPER**

**Class 5.      Date: Tuesday, Jan 31:      Work & Retirement**

13. Handbook Aging & the Social Sciences, Ch # 14: Work & Retirement
14. Phillipson, C. (1999). The social construction of retirement: Perspectives from critical theory and political economy." In M. Minkler & C. Estes (eds.) *Critical Gerontology*, pp.315-327.
15. Moody, R. Controversy 7: Is retirement obsolete? From: *Aging: Concepts and Controversies*. (4<sup>th</sup> ed.), Sage Publications, pp. 251-287.

**TEXT:** section I – Ch 4: Should there be an affirmative action policy for hiring older persons?

**Class 6.      Date: Tuesday, Feb 7:      Income Security & the Social Security Debate**

16. Handbook Aging & the Social Sciences, Ch # 20: Economic Security Policies
17. Congressional Budget Office. Social Security: A Primer (Washington, DC: CBO Sept 2001).
18. Eric Kingson and Jill Quadagno. "Social Security: Marketing Radical Reform." In Carroll R. Estes and Meredith Minkler, eds., *Critical Gerontology: Perspectives from Political and Moral Economy*. Amityville, NY: Baywood Publishing, 1999, pp. 345-358.

📖 U.S. General Accounting Office – Retirement income: Implications of demographic trends for social security and pension reform.  
<http://frwebgate.access.gpo.gov/cgi-bin/useftp.cgi?IPaddress=162.140.64.21&filename=he97081.pdf&directory=/diskb/wais/data/gao>

**TEXT:** Section I – Ch 1: Should Social Security Benefits be reduced for High-Income individuals? Section VI – Ch 20: Will Tomorrow's Elderly be Better Off?

**Note:** Class will feature a mock Congressional hearing on private personal savings accounts for Social Security. All students will prepare a statement to present at the hearing. The [www.senate.gov](http://www.senate.gov) website is a useful guide for developing your testimony.

**Class 7.      Date: Tuesday, Feb 14:      Health Care – Medicare & Medicaid**

19. Handbook Aging & the Social Sciences, Ch # 21: The Financing & Organization of Health Care.
20. Davis, M.H. & Burner, S.T. (1995). Three decades of Medicare: What the numbers tell us.” Health Affairs, 14: 236-241.

☞ Medicare Fact Sheets. The Kaiser Family Foundation. AT: <http://www.kaiseredu.org/ReferenceLibraries/Basics/index.cfm>      Download the following:

- Medicare at a Glance. March 2004.
- The Medicare Prescription Drug Law. March 2004.
- Medicare Advantage, Fact Sheet
- Medicare and Prescription Drugs. February 2003.

**TEXT:** Section I – Ch 2: Should Medicare Eligibility be Means-Tested?  
Section III, Ch 10. Should Health Care be Rationed by Age?  
Section III, Ch 11. Is Managed Care Good for Older Persons?

**DUE ON MAY 12<sup>TH</sup> : BRIEFING PAPER**

**Class 8.      Date: Tuesday, Feb 21:      Long Term Care**

21. Castle, N. & Lowe, T. (2005). Report Cards and Nursing Homes. The Gerontologist 45, 48-67.
22. Kane, R. (1995). “Expanding the home care concept: Blurring the distinctions among home care, institutional care and other long-term care services.” Milbank Quarterly, 73(2): 161-186.

☞ Schelle, J. (1997). Can Nursing Homes Use the MDS to Improve Quality? Journal of the American Geriatrics Society, 45(8), 1027-1028

☞ Duckett, M. & Guy, M. (2000). Home and community-based services waivers. Health Care Financing Review, 22(1), 123-125. [www.cms.hhs.gov/review/00fall/00Fallpg123.pdf](http://www.cms.hhs.gov/review/00fall/00Fallpg123.pdf)

☞ Uman, G. (1997). Where's Gertrude? Journal of the American Geriatrics Society, 45(8), 1025-1026.

**TEXT:** Section IV – Ch 13: Does the provision of formal services lead to families relinquishing their caregiving for relatives?  
Ch 14: Should family members be paid to provide care to elderly persons?

Ch 15: Should older persons be able to give assets to family members without affecting Medicaid eligibility?

**Exercise:** Go to <http://www.medicare.gov> and go through the process of selecting a Nursing Home for a relative or friend, using the “Nursing Home Compare.” Please come to class prepared to talk about the properties and limits of information available to make an appropriate Nursing Home choice. Discuss ways in which you sought additional information about one of the nursing homes that came up in your search list. In your opinion, what can/should be done to make this process more informative, easier to use, etc.? (This will be included in your class participation grade).

**Class 9.            Date: Tuesday, Feb 28:            Student Presentations**

**Class 10.          Date: Tuesday, March 7:            Student Presentations**

## **GUIDELINES FOR ASSIGNMENTS**

### **POLICY ISSUE BRIEF (# 4 in the assignments)**

A common role of policy professionals is to “brief” (i.e., “inform thoroughly in advance”) decision makers (e.g., legislators) about a particular issue. The objective is to provide a clear and concise exposition of the issue(s) under consideration, the associated policy dimensions and implications, and recommendations for action.

#### **Format of Issue Brief paper:**

Select a policy area of interest, (e.g., mental health care, employment, nursing home care, community care, housing, end-of-life care, elder abuse, family caregiver support, kinship care, transportation, prescription drugs, or other area – preferably one that we have not covered in the class). Please discuss this choice with the instructor.

The paper should be double spaced, have a cover page that contains the title of your policy briefing and your name, and follow to the format and suggested page length for each section (in parentheses).

#### **I. Abstract (1 paragraph)**

State what the problem is and describe the possible alternatives and their most important consequences. You will write this part of your paper last.

#### **II. Introduction to the policy issue (2-3 pages)**

State the problem you are researching, and why it is of interest to the public. Here is where you discuss the breadth of the problem and the need for effective policies to be developed. You will review research literature that supports your points. In this section you also can discuss the different groups being affected by this issue.

#### **III. Review of data, evidence, and the literature (3-4 pages)**

Discuss relevant research, theory, and historical information that illustrates why this is an important policy problem that needs to be addressed. It is important that you explore various aspects of the policy problem, which will involve finding a range of literature that discusses factors related to the issue from

various points of view. Include here any current programs, policies that address this issue, and discuss the available data on these programs and policies.

#### IV. Political Context (1-2 pages)

What are the various views on this issue? Point out any advocacy groups that are active in dealing with the issue and what they are doing/saying. Describe any current legislation or policy initiatives related to this issue.

#### V. Policy Recommendations/ Forecast (2 pages)

What policies, activities, programs, and changes do you propose that would address this issue?

#### VI. References

There should be a minimum of 10 -12 references used. Half of your references should be research-based from refereed, professional journals or book chapters written by policy and other researchers. The rest of your references should be respected educational and advocacy group web sites that assist you with describing the background of the issue (get approval from instructor). Make sure you note in your paper that the information is coming from an educational or advocacy based group.

#### **Class Presentation:** (# 5 in the assignments)

The class presentation will consist of the following:

- (1) A summary of the briefing paper.
- (2) Describe how this area of interest and policy is addressed in another country. (e.g., describe demographics, level of economic development, political process, and assumptions about aging and social policy, and what policies have been implemented)