SYLLABUS

GRNT6210 Aging and Public Policy
MPAD 6210 Aging and Public Policy

“Examination of the public policy making process with attention to aging policy. Consideration of determinants of aging policy and institutions and actors in the policy making process and piecemeal development of legislation will be analyzed as factors related to the making of policy for the aged.” (UNC Charlotte Graduate Catalogue 2004-2005).

3 Credits  Barnard 244  Fall 2009  Tuesdays, 6:30-9:15 pm
Instructor:  William P. Brandon, PhD, MPH
Department of Political Science, Fretwell Bldg 455D
Tel: 704-687-3886; Fax: 704-687-3497
E-Mail:  wilbrand@uncc.edu

Seminar Role in the Curricula
GRNT/MPAD 6210 is a three credit elective in the Gerontology, Public Administration and Health Administration masters programs and in the certificate in gerontology. Doctoral students in PhD programs in public policy, health services research and psychology may also find that the seminar is useful.

Rationale
Although often overlooked, government policy is a major factor in determining how the elderly live in the United States. For example, it has been cogently argued that retirement as a phase of life was created by the advent of Social Security in 1935. Many other programs were developed subsequently to help the elderly cope with basic needs for health care, housing, sociability, etc. Periodic White House Conferences on Aging have served to focus public attention on the needs of the elderly. The last one was held in 2005. Therefore, federal and state policies that are intended to address the problems of older Americans are a recognizable subcategory of public policy. Indeed, scholars in the field of comparative public policy have demonstrated that the U.S. is a leader among welfare states in developing benefits for older citizens and in neglecting benefits for citizens in other categories.

Several conditions make this a particularly significant time to examine public policy relating to older Americans. The growing federal deficit coupled with the rapid increase in the number of Americans 65 and over raises questions about the ability of the economy to continue to provide public benefits that previous cohorts of older Americans have received. At the same time corporate America is redefining the extent of employers’ obligations to provide for the needs of retired workers. Health care costs for older Americans continue to rise, whether paid by the individual, an employer or the government. Yet the first quarter of the twenty-first century is likely to see unparalleled but costly advances made in curing diseases and mitigating disability.
Equally interesting will be the ways in which large numbers of aging Americans may change a heretofore youth-oriented culture. In the last ten years, for example, the harbingers of new expectations for vigorous and sexually active culture of aging can be discerned in the development of advisements for drugs and medical devices designed to sell products to older viewers.

Seminar Goals. The principal goals of this seminar are to insure that students gain knowledge about a broad range of public policies relating to older Americans and an understanding of the changing conditions that in part determine public policy related to issues of aging. Full understanding of these problems requires attention to the underlying changes in demography, economics and biomedical science that can be expected in the twenty-first century. A secondary aim is to provide students with concepts that aid in discussing public policy-making.

Seminar Learning Objectives
Successful completion of this seminar will enable a student to:

- Gain an overview of public policies at the national level that have particular relevance to older Americans and to aging within the life course;
- Have a general idea of the historical evolution that has produced the major public policies relevant to older Americans;
- Understand Social Security, private pensions and Medicare;
- Understand the role of Medicaid in providing long-term care for older Americans;
- Increase his or her general understanding of the structures and institutions of U.S. and state governments, including the presidency and governor, congress and state legislature, judiciary and bureaucracy;
- Learn to use such concepts as the policy cycle to analyze policy-making related to older Americans.

Teaching Strategies. Discussion and lecture are the principal strategies used in this seminar, which will be highly interactive. Masters-level students will also have an opportunity to execute a major written project if they choose. Doctoral students are expected to write a traditional term paper.

The seminar will be more rewarding when we can have discussions that permit us to learn from each other. Therefore, it is essential that students read the assignments before class and come to class prepared to discuss the material.

Course Materials
(1) The University bookstore has four books in stock. The last text is recommended, but not required.


(2) All materials except for the texts or items distributed in class will be available in library reserves or emailed to students. The New Politics of Old Age Policy will be available on reserve in the library for those who do not wish to purchase the book.

**Seminar Requirements and Grading.** A midterm exam will be held on November 10; the final exam is on December 15. Masters-level students may substitute a traditional 20-paged research paper for the final exam with the permission of the instructor (who should be consulted early in the course) and satisfactory performance on the midterm. Doctoral students are expected to write a research paper; they may choose whether or not to take the final exam. Students electing to write a term paper must continue to complete all reading assignments, attend classes and participate fully in the seminar.

The midterm exam will constitute about 40% of the final grade and the final exam or term paper, about 50% of the course grade. Students showing marked improvement in the work graded in December will have that improvement reflected in the final course grade. Finally, a grade for class participation will count for no more than 10% of the course grade.

**Instructor’s Office Hours:** Mondays & Wednesdays 5-6:30 pm and throughout the workweek by appointment. Students are urged to email to ensure that no conflict has arisen.

**The Code of Student Academic Integrity** (see Graduate Catalog 2004-2005, p. 333, and the Office of the Dean of Students) will be strictly enforced.

Students have the responsibility to know and observe the requirements of The UNCC Code of Student Academic Integrity. This code forbids cheating, fabrication or falsification of information, multiple submissions of academic work, plagiarism, abuse of academic materials, and complicity in academic dishonesty. Any special requirements or permission regarding academic integrity in this course will be stated by the instructor, and are binding on the students. Academic evaluations in this course include a judgment that the student’s work is free from academic dishonesty of any type; and grades in this course therefore should be and will be adversely affected by academic dishonesty. Students who violate the code can be expelled from UNCC. The normal penalty for a first offense is zero credit on the work involving dishonesty and further substantial reduction of the course grade. In almost all cases the course grade is reduced to F. Copies of the code can be obtained from the Dean of Students Office. Standards of academic integrity will be enforced in this course. Students are expected to report cases of academic dishonesty to the course instructor.

**Students with Disabilities** should consult with the Office of Disability Services in Fretwell 230 at the beginning of the semester if that office does not already know about the student’s needs.
I. INTRODUCTION TO THE COURSE, THE WELFARE STATE AND THE STUDY OF PUBLIC POLICY

FIRST CLASS:   August 25
Getting Started: Background to the Course, Aging Policy & the Policy Process
Reading:  Syllabus for the Course

What is the “Welfare State?”

SECOND CLASS:  September 1
Frameworks for Analyzing Public Policy and More Background on Aging Policy

THIRD CLASS:  September 8
Policies Create Politics: Evolution of Policy-Making on Aging
II. THE FUNDAMENTAL ISSUES FOR AGING POLICY IN THE U.S.:
Biomedical Science, Demography, Economics

FOURTH CLASS: September 15
Problems for Aging Policy Generated by Advances in the Life Sciences and Changing Population Profiles


FIFTH CLASS: September 22
The Economic Dimension: What Can We Afford in the Future?


SIXTH CLASS: September 29
The Special Case of Specific Vulnerable Populations
“Local Applications of Aging Policies: The Status of Seniors Initiative”
Debora M. Sparks, Executive Director, Council on Aging
Kellie Visker Gonyar, Carolinas Healthcare System

1. Public Policy for Vulnerable Populations

2. Caring, the Real Bottom Line

III. POLICY SECTORS: Age-Related Income, Health Care, Housing Policies & Issues

SEVENTH CLASS: October 6
Securing Income: Social Security and Its Reform
1. Overview: Ideological and Moral Conflict Revealed by the “Ownership Society”

2. What is Social Security and How Does It Work?

3. What Are the Problems with Social Security?

4. President Bush’s Effort to Change Social Security


HOLIDAY: October 13

EIGHTH CLASS: OCTOBER 20
Private Pensions—The Second Stool + More on Social Security (& Medicare)


Mary Williams Walsh, “Talk of Changing Pension Math Raises Concern on Benefit Cuts,” New York Times, 20 January 2005, pp. A1, C8. [N.B.: This article illustrates the hybrid pension fund discussed in Rappaport chapter preceding it; they should be read together.]


2. Work History, Retirement and Private Pensions


3. Government as an Employer

NINTH CLASS: October 27
Securing Healthcare and Health: Medicare

1. Overview: Problems with the U.S. Healthcare System and Medicare


3. Older Americans and Current Health Care Reform Efforts


TENTH CLASS: November 3

Medicare, Medicaid and Long-Term Care (Focus: Outside Nursing Homes)


**Optional:** Pam Kelley, “How to Serve Seniors?” *Charlotte Observer*, 28 January 2007, pp. 1A, 10A.

1. Medicaid


2. Long-Term Care


ELEVENTH CLASS: Midterm Exam November 10
Institutional Long-Term Care; Politics of Long-Term Care & Medicaid

1. Overview and Scope of Institutional Long-Term Care

Reading: MedPAC, Report to Congress: Medicare Payment Policy, March 2009 (Washington DC: MedPAC), “2D Skilled Nursing Facility Services” and 2G Long-Term Care Hospital” [“Section Summary” only], pp. 159-182, 231-234.


2. Funding and Regulation of Institutional Long-Term


Vincent Mor, “14 Improving the Quality of Long-Term Care with Better Information,” in Handbook of Long-Term Care Administration and Policy, edited by Cynthia M. Mara and Laura K. Olson (Boca Raton FL: CRC Press, 2008), pp.267-292.

Randall Brown, “Consumer-Directed Care and Its Implications for State and Federal Long-Term Care Policy” paper commissioned by the Commonwealth Fund for use in its 2005 Colloquium Building Bridges: Making a Difference in Long-Term Care, June 25, 2005, Boston MA.

3. Alternatives to Standard-Issue LTC


4. Politics of Long-Term Care/Medicaid


THIRTEENTH CLASS: November 24

Housing for the Aged, Financing, and Changes in Residential Choices

1. Differing Housing Arrangements, especially for Low-Income Aged Needing LTC


Stephen M. Golant, “Affordable Clustered Housing-Care for Older Americans: A Category of Long-Term Care Options for the Elderly,” Journal of Housing for the Elderly 22 (Nos. 1 & 2, June 2008): 3-44.


2. Housing-Related Financing: Reverse Mortgages


3. Residential Choices and Their Implications


IV. THEORETICAL CONTEXT: Global, Political and Normative Perspectives on Public Policy Related to Aging

FOURTEENTH CLASS: December 1

Looking to Europe for Models of the Welfare State


FIFTEENTH CLASS: December 8

Wrap-Up and Summary

1. Social Insurance As the Principal Instrument of the Welfare State

2. Intergenerational Equity in Private as well as Public Retirement Plans

SIXTEENTH CLASS: December 15—Final Exam 2 ½ Hours (6:30-9)

Term Papers due from masters students choosing to substitute 20-paged paper for a final exam