THE UNIVERSITY OF MICHIGAN  
SCHOOL OF SOCIAL WORK

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Winter 2002 - Room 3752 SSWB  
Office Hours:  
Mon. 2-3:00 P.M. & Wed. 2-3:00 P.M.  
By Appointment

| Course Title: Policies and Services for the Elderly |
|---|---|
| Division Number: 790 |
| Course Number: 644 |
| Credit Hours: 3 |
| Prerequisites: SW530 |
| Location: Adults and Elderly SWPS Course |

Course Description:
This course will examine the social policies, problems, and trends in social programs and services for the aged. We 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 institutions and residential care. This course will provide a framework for an analysis of the services provided to older people. This analysis will include the adequacy with which needs are met in various subgroups of the elderly, as well as proposals for change. Public, nonprofit, and for-profit programs will be compared in terms of access to benefits and services and in relation to services for the elderly.

Course Content:
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 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 as a consequence of public and community initiatives. Students will be exposed to content areas that will enable them to understand aging programs dealing with social services, health care, housing, and other elements of community and institutional long-term care systems.

Intensive focus for this course is social justice, oppression and power relationship’s implications on social policies and services for the elderly. The “political economy of aging,” a major paradigm by Dr. Carol Estes and her colleagues is used to critically analyze policies and services provided to older people. The political economy of aging, addresses the “the ‘interlocking systems of oppression’, of race, class, gender, and aging” thereby creating an excellent model for understanding oppression and privilege, and proposals for change.
Course Objectives:
Upon completion of the course, students will be able to:

1. Describe the evolution and organization of policies and services for the elderly in the context of the problems which give rise to the need for such policies and services.
2. Critique the strengths and weaknesses of the U.S. social service delivery system for the elderly and make comparisons with other countries.
3. Identify the problems facing the development of services for the elderly and suggest approaches to address these challenges.
4. Identify criteria for assessing the success of programs for the elderly.
5. Critically evaluate alternative policies and services for the elderly.
6. Discuss typical ethical concerns related to policies and services for the elderly.

Course Design:
This course will typically involve a combination of lecture and discussion. Guest speakers, multimedia presentations, community visits, and student presentations may be used to supplement and enhance discussion of individual topics.

Relationship of the Course to Four Curricular Themes:

1. Multiculturalism and Diversity will be addressed through analysis of differences in needs among subgroups within society and the differential application and impact of policies and services.
2. Social Justice and Social Change will be addressed by 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 behavior considered harmful to self or others.
3. Promotion, Prevention, Treatment, and Rehabilitation will be addressed by 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).
4. Behavioral and Social Science Research will be addressed by the inclusion of theoretical frameworks for understanding social roles, social stratification, and societal functioning among the elderly. The findings of research studies relevant to the design and evaluation of policies and services for older adults will also be included.

Relationship of the Course 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 the elderly. Special emphasis will be given to ethics and values concerning policies and services that provide older people with autonomy.
CLASS DESIGN AND EXPECTATIONS FOR STUDENTS

Class Process:
We will conduct the class in a seminar fashion, which means students will be expected to fully participate in the learning process. Seminars’ will include a range of activities, lectures, guest speakers, discussions, audiovisuals, community visits, and student presentations. The above activities will be integrated at critical points in the semester to facilitate a better understanding of the course content.

Writing Policy:
Good writing skills to express information accurately and concisely to individuals involved in helping client systems, are a requirement for effective social work practice. Therefore, formal writing assignments for this course (i.e., papers) will be evaluated both for content, ideas presented, and for the clarity of the presentation.

Appropriate referencing is required on all written assignments. Failure to use quotation marks for short quotations or indentations for longer, direct quotes with appropriate citations will result in a grade of zero as will failure to provide citations for indirect quotations. If you do not know how to reference a paper, now is the time to learn. Please seek assistance before you submit your assignments. One source is “Writing Term Papers . . .” by professor Kossoudji, in your Student Guide to the Master’s in Social Work Degree Program. See also other appropriate university publications for penalties that may result from scholastic dishonesty such as plagiarism or cheating on tests.

The Publication Manual of the American Psychological Association is the style manual to be used by all students. Papers are to be double spaced, typewritten/word processed with a 12-point font. All papers should be in narrative format.

LSA has a College Writing Workshop which faculty of the English Composition Board staffs. Workshop faculty offers students assistance in completing specific assignments or projects to help in improving academic writing skills. Feel free to use this service. Students have found it to be very helpful. For further information contact:

Student Writing Workshop
Monday - Friday 8:00 A.M. -5:00 P.M.
1139 Angell Hall, 1003
734-764-0429
ALL written assignments will be graded according to the following criteria. Please review this section before submitting any written work:

1. COMPLETENESS AND THOROUGHNESS: MAXIMUM POINTS = 30
   How fully has the issue been addressed? Has the student sufficiently researched the issue using library resources, interviews, and other means to gain differing perspectives and full knowledge of the issue? Does the paper leave the reader with the impression that major questions have been considered or are important issues not addressed? Has the paper been carefully proofread?

2. ORGANIZATION AND CLARITY: MAXIMUM POINTS = 15
   Is the paper well written and organized in a logical manner? Are there appropriate transitions between, paragraphs, and sections? Is the sentence structure, syntax, and grammar of appropriate quality for a graduate student? Have subtitles been used to improve organization? Has the student addressed issues in a way that someone unfamiliar with the issue can understand as well as someone knowledgeable about the particular issue?

3. REFERENCING: MAXIMUM POINTS = 25
   Are there a sufficient number of references? Has the theoretical and empirical literature on the subject been incorporated into the paper? Are the references well integrated in the text of the paper? Has referencing been done appropriately and according to the style of the American Psychological Association?

4. ORIGINALITY AND CREATIVITY: MAXIMUM POINTS = 30
   Has the student used his or her analytical skills in a way that suggests more than a restatement of what others have said about the issue? Has the student compared, contrasted, and integrated the different viewpoints and material on the subject in a way that shows that she or he has a thorough understanding of the issue? Has the student suggested points that others have not addressed?

A comment sheet with points earned for each criterion will be returned with each paper.
COURSE REQUIREMENTS

WEEKLY PARTICIPATION IN CLASS - (15% of final course grade)
This course is in part, preparation for your professional career.
   a. Each student is expected to display professional behavior in class.
   b. Attendance is required, and you are to arrive on time and remain for the entire class.
   c. Each student is expected to actively participate in all class activities and discussions.
   d. All reading assignments should be completed before class on the day indicated in the
      syllabus.
   e. Class participation is an integral part of the grade and will be judged on quality, not just
      quantity.

Student Project #1 - PROGRAMS & DIVERSITY PAPER & PRESENTATION (25% of final course grade)
Each student is to identify a program for older adults that they are interested in from the program
areas and chapters in the Gelfand text which follows. This assignment is to help students gain
knowledge of existing Programs for the Aged, their characteristics, purposes and users.

- Information and Assistance, 61-8
- Transportation, 82-90
- Crime and Legal Assistance Programs, 91-110
- Employment, Volunteer, and Educational Program, 111-22
- Nutrition Programs, 123-33
- Multipurpose Senior Centers, 139-53
- Housing, 154-78
- In-Home Services, 179-91
- Adult Day Care, 192-203

There are two parts to this assignment a paper and a class presentation. Both are due on the same day,

PART ONE - Paper
You must sign up for the selected topic since no more then 3 individuals will be allowed to focus
on any one area. A sign-up sheet will be posted on my office door, SSWB # 3726. You will have to
select your topic no later that the second class, January 15, 2002.

1. Once you select your area of study you are to read and use the content from the appropriate
   chapter, listed above, in the Gelfand text.

2. You are to focus on the implications of your selected policy or program on a subgroup other
   than your own, from a racial/ethnic group, bisexual, lesbian or gay man, or physically
   challenged individuals.

3. Primary source journal articles must be used, in other words, NO BOOKS, CHAPTERS,
   PERIODICAL OR MAGAZINES. Use professional gerontological journal articles (from or
   equivalent to the attached Aging Journals List -1993 or later), to briefly describe among other
factors:

a. the history of the problem leading to the development of the policy or program;
b. the diversity and human differences of policy and/or program participants;
c. socio demographic characteristics of the population affected;
d. system and mechanisms that create and support oppression and or privilege in the policy or program, and
e. documentation of the main social justice issues, policies and services addressed by the agency.

Address how the content proves, enhances, or disproves some aspect of the assigned reading from Required texts, Estes & Gelfand. You are to use no fewer than six outside sources (plus the citations from the required readings), three of which must address an underserved population s cited above. References should be cited APA style (e.g., Jackson, J.S., 1998), and listed alphabetically at the end of the paper. Assignment #1 should be limited to 5-6 (maximum) double spaced, 12 point font typed pages. This assignment accounts for 25 percent of the course grade. Please meet with the professor to discuss or clarify any of your ideas or selections.

PART ONE - Oral Presentations

Since three students will be addressing one topical area, the oral presentations will be presented in a group format to avoid unnecessary duplication and to insure each group adequate time. Students’ will evaluate the oral presentations. A form will be provided by the instructor.

Assignments are DUE: January 29, 2002. Late assignments will not receive full credit.

Student Project #2 - Integration Papers or Discussion Leaders (30% of final course grade)

Each student is to select a current (1995-2002) professional journal article (from attached list of Journals or equivalent) that catches their interest on some aspect of the same weeks assigned readings from Gelfand and/or Estes, et al., and prepare a well-thought-out two-page (typed and double spaced) position paper that includes:

1. A brief summary of featured points.
2. How the content relates to social justice, what social justice could look like.
3. Be prepared to discuss the issues, policies, programs, and implications for the future, in light of changing older American socio demographics in class.

There are a total of 5 weekly papers based on class topics. Papers are due:

#1 February 5, 2002
#2 February 19, 2002
#3 March 19, 2002
#4 March 26, 2002
#5 April 2, 2002

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Papers are to be turned in at the end of each class period.

**In lieu of the five papers**, you have the option of acting as a discussion leader (no more than two students per class). Classes are limited to allow for outside speakers.

**Discussion Leaders** - can select a class session, listed below that is of interest to them.

- February 5, 2002  *Political Economy of Aging* - Article from “work of Estes, Quadango & others) pages 20-21 Estes text.
- February 19, 2002  *Work, Retirement, Economic Status*
- March 19, 2002  *Health Care Issue* (not on Medicare or Medicaid)
- March 26, 2002  *Mental Health*
- April 2, 2002  *Long-Term Care*

By the 2nd class session, those wanting to be discussion leaders must sign up with the instructor.

**Leaders will:**
Prepare a set of questions (for distribution to the class a week prior to the session) to guide the reading and discussion of your assigned topic. The questions should highlight and address the following and other relevant issues using the Estes paradigm.

1. the history of the problem leading to the development of the policy or program;
2. the magnitude of the policy or program;
3. mechanisms that support oppression and privilege in relation to the services or program;
4. how above mechanisms intersect with each other in terms of class, race and ethnicity, sexual orientation, and gender; and,
5. possible practice strategies and tactics that might be developed to move in the direction of social justice.

**REMINDER—QUESTIONS SHOULD BE PREPARED IN ADVANCE** for review by instructor, and for class distribution at least ONE week before the class presentation. I will duplicate materials for distribution if received in a timely manner (not immediately before class).

- Read current journal articles on your topics to gain additional expertise in this area.
  - Prepare an outline of the material you wish to cover and other learning aids you see fit (e.g., overhead transparencies), PowerPoint, etc.
  - After your class, hand in the notes for the presentation and the references (this does not mean a formal paper, literally your notes).

- Lead the class discussion on the assigned topic, based on the questions developed.
  - Be sure to cover policy development and implementation in the focal topics, and a critique of them, key findings, and challenges and social work implications.
  - Use whatever learning exercises or activities that you feel are useful for enhancing comprehension and application of material.
  - Divide the time between your assigned areas appropriately.
Be sure to time your presentation since you may take no more than half of the class period.

Papers are DUE: On the day of the presentation.  Late assignments will not receive full credit.

Student Project #3  INTEGRATIVE POLICY DEBATE  (30% of final course grade)

This assignment is to build on what you have learned during the semester.  An understanding of social policies and social programs for the older adult, will further develop and/or hone your critical thinking skills.  The policy debate paper is designed to give each student an opportunity to critique the strengths and weaknesses of a social service policy or program for the elderly.  While citing past research into the social issues and efforts to resolve them can serve to lend support to an analysis of various debates on current controversies in social policies, they cannot replace strong critical thinking. Thus, the purpose of this assignment is to give students the opportunity to demonstrate their understanding of the “political economy of aging” paradigm and the implications for social justice. This assignment will assist each student in the development of their critical thinking and analytic skills. Each student is expected to work on this project throughout the semester.  At least two people are to work on a selected debate topic with one presenting the pro’s and the other the con’s.

The proposed issues for debate are from Scharlach, A.E., & Kaye, L.W., Eds.  (1997). Controversial Issues in Aging.  Boston: Allyn & Bacon.  While you may use the format in Controversial Issues . . . as a guide, you are to develop your own arguments with other references.  Be creative in your thinking.  And, remember, “Two people could analyze the same policy with different arguments and recommendations, because the analysis reflects the analyst' view of the world.” No rejoinders (as in the text) are necessary.  You are, however, to clearly state your issue, and your supported opinions in a debate format

Among the many substantive questions or issues that could serve to motivate the debate are:

- Should Social Security benefits be reduced for high-income individuals?
- Should eligibility for Medicare be means tested?
- Should the Aging Network be dismantled?
- Should age be abandoned as a basis for program and service disability?
- Are the elderly benefitting at the expense of younger Americans?
- Are Private-Sector solutions to Long-Term financing preferable to expansion of public long-term care programs?
- Should older persons have the right to commit suicide?
- Should health care be rationed by age?
- Is managed care good for older persons?
- Should or when should old age be a criteria considered in making public policy?

One question or issue is to be selected for research and a critical debate which includes both the pro’s and con’s: Every effort should be made to remain objective and include arguments on all sides of the issue.  Here again, the Estes Paradigm is to be used, and every argument is to be supported by data (from the professional gerontological literature, statistics, etc.) and logic.  Remember that opposing views must be presented and also supported by the literature.  On the basis of the pro’s and con’s of the debated topic, you must summarize your final conclusions in a manner that moves in
the direction of social justice. Be sure to include the implications for social workers.

This assignment does not require a formal research paper. Each student, however, is to turn in their notes for the presentation, and no fewer than 10 additional references (not from required class readings and no more than 3 from the Internet). An Annotated Bibliography of the ten references used to in support of your position is to be submitted with your notes. For your convenience "How to Prepare an Annotated Bibliography" is attached at the end of the syllabus. References should be current (1993 or later), with the exception of earlier pieces, which are necessary to lay the foundation for your debate topic. References should be cited APA style (Jackson, 1995) and listed alphabetically at the end of the paper. The debate will account for 30 percent of the course grade. Please feel free to meet with the professor to discuss or clarify any of your ideas or issues.

Debates, if we remain on schedule will begin the week of APRIL 9th or 16th 2002. Late assignments will not receive full credit.
**FINAL COURSE GRADING**

Grades will be determined by adding the scores from the articles and responses, integrative research paper, and classroom participation, and converting the numerical grade into a letter grade using the following scale:

<table>
<thead>
<tr>
<th>Grade</th>
<th>Percentage Range</th>
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<tbody>
<tr>
<td>A+</td>
<td>101% +</td>
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<tr>
<td>A</td>
<td>100% - 96%</td>
</tr>
<tr>
<td>A-</td>
<td>95% - 91%</td>
</tr>
<tr>
<td>B+</td>
<td>90% - 86%</td>
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<tr>
<td>B</td>
<td>85% - 83%</td>
</tr>
<tr>
<td>B-</td>
<td>82% - 80%</td>
</tr>
<tr>
<td>C+</td>
<td>79% - 76%</td>
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<tr>
<td>C</td>
<td>75% - 73%</td>
</tr>
<tr>
<td>C-</td>
<td>72% - 70%</td>
</tr>
<tr>
<td>&lt;69</td>
<td>No Credit</td>
</tr>
</tbody>
</table>

**Grading Procedure:**

Each student will be graded on the basis of his/her performance in each area of activity outlined below:

<table>
<thead>
<tr>
<th>Assignment</th>
<th>Grading</th>
<th>Due</th>
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</thead>
<tbody>
<tr>
<td>Student Project #1</td>
<td>25%</td>
<td>January 29, 2002</td>
</tr>
<tr>
<td>Integrative Papers or Discussion Leaders</td>
<td>30%</td>
<td>February 5, 2002</td>
</tr>
<tr>
<td>Article from &quot;work of Estes, Quadango &amp; others)</td>
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<td>February 19, 2002</td>
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<td>pages 20-21 Estes text.</td>
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<tr>
<td>Employment, Retirement, and Income</td>
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<tr>
<td>Health Care</td>
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<td>March 19, 2002</td>
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<tr>
<td>Mental Health</td>
<td></td>
<td>March 26, 2002</td>
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<tr>
<td>Long-Term Care</td>
<td></td>
<td>April 2, 2002</td>
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<tr>
<td>Student Debates Project #3</td>
<td>30%</td>
<td>April 9/16, 2002</td>
</tr>
<tr>
<td>Class Participation</td>
<td>15%</td>
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</tbody>
</table>

**You may figure your final grade by your:**

\[
\text{Final Grade} = \frac{\text{Student Project #1} \times 25\% + \text{Integrative Papers or Discussion Leaders} \times 30\% + \text{Student Project #3} \times 30\%}{60} + \frac{\text{Student Project} \times 15\%}{15} = \ldots
\]
COURSE OUTLINE

Required Text:


Library Reserve:

Aging Policy Sources Online @ http://www.lib.umich.edu/socwork/agingpolicy.html

Supplemental Readings:
Additional readings, such as special issues of *The Public Policy and Aging Report*, will be a part of the formal assignment. Handouts will also be distributed during the semester.

UNIT ONE

Week 1 - January 8, 2002
**Introductions**
Course overview

**Historical Background - Older American Act - The Aging Network**

Week 2 - January 15, 2002
**Historical Perspective**
Policy and programs
The Older Americans Act of 1965 - as Amended in 2000

**Required Readings:**
Gelfand, D.E.: The Older American, 1-10.
Handout: The Older Americans Act as Amended, 2000.

Week 3 - January 22, 2002
Guest speaker: Holliace P. Spencer
Director, Community Services Division
Michigan Department of Community Health
Office of Services to the Aging
Week 4 - January 29, 2002 - STUDENT GROUP PRESENTATIONS

Programs for the Aged, *their characteristics, purpose and users*.
- Information and Assistance, 61-8
- Transportation, 82-90
- Crime and Legal Assistance Programs, 91-110
- Employment, Volunteer, and Educational Programs, 111-22.
- Nutrition Programs, 123-33
- Services for the Aged, 135-7
- Multipurpose Senior Centers, 139-53
- Housing, 154-78
- In-Home Services, 179-91
- Adult Day Care, 192-203

Week 5 - February 5, 2002  Political Economy of Aging Framework  INTEGRATIVE PAPERS – STUDENT DISCUSSION LEADERS

- Political, economic and social conflicts
- Power struggles - differing ideologies
- Systems of oppression

Application of Critical Perspective Approach
- Aging and health from gerontological, political, feminist, & cultural foundation

Required Readings:

Week 6 - February 12, 2002

Processes that Shape Old Age, Aging & Policy Formulation
- Medicalization, commodification, privatization & rationalization

Required Readings:
UNIT TWO
WORK, RETIREMENT, ECONOMIC STATUS

Week 7 - February 19, 2002 INTEGRATIVE PAPERS – STUDENT DISCUSSION LEADERS
Employment, Retirement and Income -
Financial well-being
Federal programs for the employment of the older population
Labor force trends
Early retirement
Political Economy of Sex, Gender -
Creation and perpetuation of economic and social dependency of women
Inequality resulting from dependency
Economic and social well being
Social support, mortality, morbidity and the use of health care
Required Readings:
Gelfand, D.E.: Age, Employment, and Income Maintenance, 29-44.

Week 8
February 26, 2002
SPRING RECESS!

Week 9 - March 5, 2002
Social Security
Precedents to Social Security
The 1935 law & major amendments
Required Readings:
Week 10  March 12, 2002
Speaker - Barbara Zaret, MSW
Program Coordinator
Medicare/Medicaid Assistance Program

Health care programs
Medicare
Medicaid
Managed care

Required Readings:
http://www.hcfa.gov/

Week 11 - March 19, 2002
INTEGRATIVE PAPERS – STUDENT DISCUSSION LEADERS
Health Care Issues

Required Readings:
Gelfand, D.E.: Illness, Medical Care, and Income Maintenance, 45-58;
    Health & Mental Health, 69-73.

Week 12  March 26, 2002 – INTEGRATIVE PAPERS – STUDENT DISCUSSION LEADERS
Mental Health
    Age-related facts
    Availability of resources
    Responsibility for care

Required Readings:
Gelfand, D.E.: Health & Mental Health, 73-81

Week 13  April 2, 2002 – INTEGRATIVE PAPERS – STUDENT DISCUSSION LEADERS
Long-Term Care
    Institutionalization
    Quality of life

Required Readings:
Estes, C.L., et al.: The Underdevelopment of Community-Based Services in the U.S. Long-
    Term Care System: A Structural Analysis, 201-13.
Gelfand, D.E.: Long-Term Care Residences, 204-23.
UNIT FIVE
STUDENT DEBATES & CONCLUDING NOTES

Week 14  April 9, 2002 - - STUDENT DEBATES

Week 15  April 16, 2002 - - STUDENT DEBATES
The future of gerontological social work
Course summation

Required Readings:
Gelfand, D.E.: Challenges for the Aging Network, 224-32
SELECTED AGING JOURNALS & OTHER SOURCES

AGING JOURNALS

Abstracts in Gerontology (Current Literature on Aging)
Advances in Gerontological Research
Aging
Clinical Gerontologist
Educational Gerontology
Generations
Geriatric Nursing
(The) Gerontologist
Gerontology and Geriatrics
Health & Social Work
International Journal of Aging and Human Development
Journal of Aging and Ethnicity
Journal of Aging Studies
Journal of American Geriatric Society
Journal of Applied Gerontology
Journal of Cross Cultural Gerontology
Journal of Elder Abuse & Neglect
Journal of Gerontological Nursing
Journal of Gerontological Social Work
(The) Journals of Gerontology. Series B, Psychological Sciences and Social Sciences
Journal of Women & Aging
Policy & Practice of Public Human Services
Social Security Bulletin
(The) Social Service Review
Social Work
Social Work Abstracts
Social Work Research
Research on Aging Social Policy
SELECTED POLICY BOOKS


