

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 Political Science Conference Room, Fretwell 445F Spring 2007
Mondays, 6:30-9:20 pm

Instructor: William P. Brandon, PhD, MPH
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Seminar Role in the Curricula

GRNT/MPAD 6210 is a three credit elective in the Gerontology and Public 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.

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 raise questions about the ability of the economy to continue to provide public benefits that past 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 will change a heretofore youth-oriented culture. In the last ten years, for example, the

harbingers of an “old” culture 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;
- Understand in detail both the current situation of Social Security, private pensions and Medicare and the on-going political struggles to change or maintain major aspects of these sources that provide for many of the basic needs of older Americans;
- 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 three books in stock. The last text is recommended, but not required.

- Stuart H. Altman and David I. Shactman, editors, *Policies for an Aging Society* (Baltimore: The Johns Hopkins University Press, 2002).
- Henry J. Aaron and William B. Schwartz, editors, *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society* (Washington DC: Brookings, 2004).
- Robert B. Hudson, editor, *The New Politics of Old Age Policy* (Baltimore: The

Johns Hopkins University Press, 2005). *Recommended*.

(2) All materials except for the text or items distributed in class will be available through 49er Express 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 February 26; the final exam is on May 7. 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 bringing their grades up to a higher letter grade range in the final exam will receive a course grade of the next higher letter grade (since UNC Charlotte does not award “plus” or “minus” grades). Finally, a grade for class participation will count for no more than 10% of the course grade.

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.

SYLLABUS

GRNT/MPAD6210 Aging and Public Policy

3 Credits Political Science Conference Room, Fretwell 445F Spring 2007

Mondays, 6:30-9:20 p.m.

Instructor: William P. Brandon, PhD, MPH

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I. INTRODUCTION TO THE COURSE AND THE STUDY OF POLICY

FIRST CLASS: January 8

Getting Started: Background to the Course, Aging Policy and the Policy Process

Reading: Syllabus for the Course

William P. Brandon and Patricia Malony Alt, "Health Politics and the Elderly: On Beyond Aging," forthcoming in *Health Politics and Policy*, 4th edition, edited by James A. Morone and Leonard S. Robins (Albany NY: Delmar, forthcoming), Sections on "Societal Understanding," "Institutional Structures," pp. 1-27 (or up to the section "Policy Issues").

January 15: No Class--Martin Luther King Day

SECOND CLASS: January 22

Frameworks for Analyzing Public Policy and More Background on Aging Policy

Reading: Robert B. Hudson, "1. Contemporary Challenges to Age-Based Public Policy," in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 1-19. **Optional:** "Preface," pp. xi-xiii.

Carol S. Weissert and William G. Weissert, *Governing Health: The Politics of Health Policy*, 3rd Edition (Baltimore: The Johns Hopkins University Press, 2006), "6 The Policy Process," pp. 301-342.

THIRD CLASS: January 29

Policies Create Politics: Evolution of Policy-Making on Aging

Reading: Henry J. Pratt, *The Gray Lobby* (Chicago: University of Chicago Press, 1976), "8 Senior Citizens and the Older Americans Act," "9 The 1971 White House Conference on Aging," "10 The Bid for Sustained Senior-Group Policy Influence," "11 Old-Age Groups and Enactment of the 1972 Social Security Amendments," "12 Constraints in the Political Environment," pp. 107-184.

Christine L. Day, *What Older Americans Think* (Princeton NJ: Princeton University Press, 1990), "2 The Rise of Old-Age Interest Groups," pp. 14-35.

Diane E. Justice, "The Aging Network: A Balancing Act between Universal Coverage and Defined Eligibility," *The Future of Age-Based Public Policy*, edited by R.B. Hudson (Baltimore MD: Johns Hopkins University Press, 1997), pp. 168-177.

Stuart H. Altman and David I. Schactman, editors, *Policies for an Aging Society* (Baltimore: The Johns Hopkins University Press, 2002), “1 Overview: Issues and Options for an Aging Population,” pp. 3-12. **Optional:** “A Synopsis of the Chapters” and “Conclusions,” pp. 12-33.

II. THE FUNDAMENTAL ISSUES FOR AGING POLICY IN THE U.S.: Biomedical Science, Demography, Economics

FOURTH CLASS: February 5 Problems for Aging Policy Generated by Advances in the Life Sciences and Changing Population Profiles

Reading: Henry J. Aaron and William B. Schwartz, editors, *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society* (Washington DC: Brookings, 2004), “Introduction,” pp. 1-15.

John T. Potts and William B. Schwartz, “1 The Impact of the Revolution in Biomedical Research on Life Expectancy by 2015,” and Nickolas Wade’s “Comment,” in Aaron and Schwartz, *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society*, pp. 16-65.

Henry J. Aaron and Benjamin H. Harris, “2 Our Uncertain Demographic Future,” and Stephen Gross’ “Comment,” in Aaron and Schwartz, *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society*, pp. 66-89, 94-104.

James W. Vaupel, “The Future of Human Longevity,” Excerpts from Testimony before the Senate Special Committee on Aging, 3 June 2003, reprinted in *News of Duke University, Terry Sanford Institute of Public Policy*, Summer 2003, pp. 6-7.

Optional: Kevin Kinsella and David R. Phillips, “Global Aging: The Challenge of Success,” *Population Bulletin*, 60 (1; March 2005): 3-40.

Angela M. O’Rand, “When Old Age Begins: Implications for Health, Work, and Retirement,” in Hudson, *New Politics of Old Age Policy*, pp.109-128.

Optional: Gina Kolata, “A Surprising Secret to a Long Life: Stay in School,” *New York Times*, 3 January 2007, pp. A1, A16.

FIFTH CLASS: February 12 The Economic Dimension: What Can We Afford in the Future?

Reading: Victor R. Fuchs, “17 The Financial Problems of the Elderly: A Holistic View,” in Altman and Schactman, *Policies for an Aging Society*, pp. 378-389.

Henry J. Aaron, “3 Budget Estimates: What We Know, What We Can’t Know, and Why It Matters,” in Altman and Schactman, *Policies for an Aging Society*, pp 63-80.

C. Eugene Steuerle and Paul N. Van de Water, “4 Long-Run Budget Projections and Their Implications for Funding Elderly Entitlements,” in Altman and Schactman, *Policies for an Aging Society*, pp. 81-108.

Wendell E. Primus, “5 Increased Public Spending on the Elderly: Can We Afford It?” in Altman and Schactman, *Policies for an Aging Society*, pp. 109-126.

Rudolph G. Penner, “6 The Economic Consequences of Funding Growing Elderly Entitlements,” in Altman and Schactman, *Policies for an Aging Society*, pp. 127-139.

SIXTH CLASS: February 19
The Special Case of Specific Vulnerable Populations;
Contemporary Politics of Aging Policies

Reading: Judith G. Gonyea, "8. The Oldest Old and a Long-Lived Society: Challenges for Public Policy," in Hudson, *New Politics of Old Age Policy*, pp. 157-180.

Chenoa A. Flippen, "7 Minority Workers and Pathways to Retirement," in Hudson, *New Politics of Old Age Policy*, pp. 129-156.

Robert H. Binstock, "13 The Contemporary Politics of Old Age Policies," in Hudson, *New Politics of Old Age Policy*, pp. 265-293.

Elaine S. Povich and Marie Cocco, "How the New Congress Will Push for Your Priorities," *AARP Bulletin* (December 2006): 12-15.

Robert Pear, "Congressional Power Shift Revives Health Care Debate: Medicare and Stem Cell Bills Top Agenda," *New York Times*, 2 January 2007, p. A10.

Lynda Richardson, "The Slippery Intersection of Medicine and Politics," *New York Times*, 27 July 2004, p. A17.

SEVENTH CLASS: February 26—Midterm Exam

March 5: No Class—Spring Vacation

EIGHTH CLASS: March 12
Securing Income: Social Security and Its Reform

1. Overview: Providing Maslow's Basic Physiologic, Safety and Security Needs

Reading: Madonna Harrington Meyer, "Decreasing Welfare, Increasing Old Age Inequality: Whose Responsibility Is It?" in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 65-89.

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

Reading: Social Security Administration, "Your Social Security Statement," (Baltimore MD: Social Security Administration, 2006).

Board of Trustees, Federal Old-Age and Survivors Insurance and Disability Insurance Trust Funds, *The 2006 Annual Report* (Washington DC: Board of Trustees of the OASI and DI Trust Funds, May 1 2006), "Appendix A. History of OASI and DI Trust Fund Operations," "I. Introduction," and "II. Overview," pp. 124-137 (only skim the tables if they interest you), 1-17. **Optional:** "A. Demographic Assumptions and Methods," pp. 70-83 [The "Demographic Assumptions" are pretty interesting and accessible, whereas the "Economic Assumptions and Methods," pp. 83-95, make more challenging reading.]

David Espo, "Office Puts 'Trust' in Trust Fund," *Charlotte Observer*, 27 February 2005, p. 12A.

Eduardo Porter, "Illegal Immigrants Prove a Boon for Social Security," *Charlotte Observer*, 5 April 2005, p. 5A.

3. What Are the Problems with Social Security?

Reading: John B. Shoven, "5 The Impact of Major Improvements in Life Expectancy on the Financing of Social Security, Medicare and Medicaid," *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society*, edited by H.J. Aaron and W.B. Schwartz (Washington DC: Brookings, 2004), pp.166-174, 197.

Robert Pear, "Social Security Underestimates Future Life Spans, Critics Say," *New York Times*, 31 December 2004, pp. A1, A19.

4. President Bush's Effort to Change Social Security

Reading: Brandon and Alt, "Health Politics and the Elderly: On Beyond Aging," subsection "Social Security Reform," pp. 43-54.

John Waggoner, "Plan Raises Questions about Impact: Investment Returns' Fluctuations Scrutinized," *USA Today*, 8 February 2005, p. 6B.

Pamela Herd and Eric R. Kingson, "9. Reframing Social Security: Cures Worse than the Disease," in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 183-204.

David E. Rosenbaum, "Bush to Return to 'Ownership Society' Theme in Push for Social Security Changes," *New York Times*, 16 January 2005, p. 17.

George Will, "Too Many Unknowns Cloud Social Security," *The Charlotte Observer*, 20 January 2005, p. 9A.

Charlotte Observer, "Politician, Businessman Speak Up: Carolinians Share their Positions on Social Security Debate," 25 February 2005, p. 2D.

"For the Record on Social Security," Editorial, *New York Times*, 10 January 2005, p. A22.

Hal R. Varian, "Economic Scene: Two Issues Face Social Security, and Applying One Answer to Both is Risky," *New York Times*, 10 February 2005, p. C2.

Paul Krugman, "Stopping the Bum's Rush," *New York Times*, 4 January 2005, p. A23.

Paul Krugman, "The Iceberg Cometh," *New York Times*, 11 January 2005, p. A27.

Paul Krugman, "The Free Lunch Bunch," *New York Times*, 21 January 2005, p. A29.

Paul Krugman, "Social Security Lessons," *New York Times*, 15 August 2005, p. A21.

Elisabeth Bumiller, "Overhauling Retirement Is Worth Risk, Cheney Says," *New York Times*, 14 January 2005, n.p.

5. The Politics of Social Security Reform

Reading: Robert Pear, "In Ads, AARP Criticizes Plan on Privatizing: Campaign Focuses on Social Security," *New York Times*, 30 December 2004, p. A14.

Barbara Basler, "Here..." *AARP Bulletin*, February 2005, p. 10.

Joseph B. Treaster, "Insurers Want Their Say In Social Security Debate: No Single Approach Favored by Industry," *New York Times*, 2 August 2005, p. C3.

Robert Pear, "Agency Running Social Security To Push Change: Some Workers Object," *New York Times*, 16 January 2005, pp. 1, 21.

NINTH CLASS: March 19

Completing Social Security; Private Pensions--The Second Stool

1. International Experience with Private Accounts in Public Pensions

Reading: Kenneth Howse, "Pension Reform and Age of Retirement Rules," *Ageing Horizons* (no. 5, 2006), Oxford Institute of Ageing, pp. 3-11.

Steven M. Teles, "Social Security and the Paradoxes of Welfare State Conservatism," in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp.90-106.

Bob Davis and Matt Moffett, "From Nations That Have Tried Similar Pensions, Some Lessons," *Wall Street Journal*, 3 February 2005, pp. A1, A12.

Alan B. Krueger, "Economic Scene: Some Lessons from Sweden on the Pros and Cons of Privatizing Social Security," *New York Times*, 5 February 2004, p. C2.

Optional: Alan Cowell, "Sweden's Take on Private Pensions: Who Gains, Who Loses When Government Doesn't Handle Everything," *New York Times*, 12 February 2005, pp. 1B, 3B.

Jose Pinera, "Retiring in Chile," *New York Times*, 1 December 2004, p. 31.

Larry Rohter, "Chile's Candidates Agree to Agree on Pension Woes," *New York Times*, 10 January 2006, p. A3.

Paul Krugman, "Buying Into Failure," *New York Times*, 17 December 2004, p. A31.

John Tierney, "The Old and the Rested," *New York Times*, 14 June 2005, p. A19.

Optional: Paul Krugman, "The British Evasion," *New York Times*, 14 January 2005, p. A19.

2. Work History, Retirement and Private Pensions

Reading: Anna M. Rappaport, "Employer Policy and the Future of Employee Benefits for an Older Population," *The Future of Age-Based Public Policy*, edited by R.B. Hudson (Baltimore MD: Johns Hopkins University Press, 1997), pp. 178-186.

Optional: Gary Burtless, "Labor Market Effects of Dramatic Longevity Improvement," in Aaron & Schwartz (eds.) *Coping with Methuselah*, pp. 126-165 (including "Comment" by Dora L. Costa).

Lynn Etheredge, "Aligning Incentives for a National Retirement Policy," in Altman and Schactman, *Policies for an Aging Society*, pp. 316-329.

3 Selections from Coverage of 2006 Pension legislation, *CQ Weekly*. Distributed by email.

David Leonhardt, "Save Yourself: The Next Generation Looks at a Ricketty Retirement Structure and Assumes Nothing," *New York Times*, 11 April 2006, Retirement Section, p. E1, E12.

Mary Williams Walsh, "Once Safe, Public Pensions are now Facing Cuts," *New York Times*, 6 November 2006, pp. A1, A15.

Mary Williams Walsh, "Estimates for Pensions Tighten," *New York Times*, 29 December 2006, pp. C1, C6.

Eduardo Porter and Mary Williams Walsh, "Retirement Turns Into a Rest Stop as Pensions and Benefits Dwindle," *New York Times*, 9 February 2005, pp. A1, C4.

Joseph P. Fried, "Willing Workers, but Little Training to be Found," *New York Times*, 11 April 2006, Retirement Section, p. E10.

Mary Williams Walsh, "Talk of Changing Pension Math Raises Concern on Benefit Cuts," *New York Times*, 20 January 2005, pp. A1, C8.

Mary Williams Walsh, "Overhaul Plan for Pensions is Outlined: Companies Would Pay Much Higher Premiums," *New York Times*, 11 January 2005, pp. C1, C10.

Mary Williams Walsh, "How Wall Street Wrecked United's Pension: Money Managers Were Paid in Full, but (Oops!) Retirees Won't Be," *New York Times*, Sunday Business, 31 July 2005, pp. 1, 8.

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

Reading: John Myles, "What Justice Requires: A Normative Foundation for U.S. Pension Reform," in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 42-64.

TENTH CLASS: March 26

Securing Healthcare and Health: Medicare

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

Reading: Malcolm Gladwell, "The Moral Hazard Myth Why Our Health System Doesn't Work," *New Yorker*, 29 August 2005, pp. 44-49.

Alan M. Garber and Dana P. Goldman, "The Changing Face of Health Care," in *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society*, edited by H.J. Aaron and W.B. Schwartz (Washington DC: Brookings, 2004), pp. 105-125.

John B. Shoven, "5 The Impact of Major Improvements in Life Expectancy on the Financing of Social Security, Medicare and Medicaid," *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society*, edited by H.J. Aaron and W.B. Schwartz (Washington DC: Brookings, 2004), pp.175-185, 197.

The Boards of Trustees, Federal Hospital Insurance and Federal Supplementary Medical Insurance Trust Funds, *2006 Annual Report*, Washington DC: 1 May 2006, pp. 1-28. [www/USTreas.gov/offices/economic-policy/reports.pdf]

2. Medicare Policy with an Emphasis of the Medicare Modernization Act of 2003

Reading: Brandon and Alt, "Health Politics and the Elderly: On Beyond Aging," Section "Policy Issues" to end of subsection "Medicare," pp. 27-43.

Marilyn Moon, "Sustaining Medicare as an Age-Related Program," in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 205-218.

Weisserst and Weissert, *Governing Health: The Politics of Health Policy*, 3 ed., "Chap. 7 Problem to Policy: Politics of the Medicare Prescription Drug Law," pp. 343-384.

William P. Brandon, "Converting Social Insurance Into Means-Tested Welfare: The Surreptitious 'Modernization' of Medicare," paper delivered at the Annual Meeting of the Association for Politics and the Life Sciences, Washington D.C., September 1, 2005.

Optional: Thomas R. Oliver, Philip R. and Helene L. Lipton, "A Political History of Medicare and the Prescription Drug Coverage," *Milbank Quarterly* 82 (No. 2, 2004): 283-354.

ELEVENTH CLASS: April 2

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

1. Medicaid

Reading: Colleen M. Grogan, "The Politics of Aging within Medicaid," in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 219-243.

John B. Shoven, "5 The Impact of Major Improvements in Life Expectancy on the Financing of Social Security, Medicare and Medicaid," and "Comment" (by William G. Gale) *Coping with Methuselah: The Impact of Molecular Biology on Medicine and Society*, edited by H.J. Aaron and W.B. Schwartz (Washington DC: Brookings, 2004), "Medicaid" and "Comment," pp.185-189, 194-197.

Medicare Payment Advisory Commission, "3 Post-Acute Care Providers: An Overview of Issues" and "3B Home Health Services," in *Medicare Payment Policy: Report to Congress*, March 2007, (Washington DC: MedPAC), pp. 152-162 and 186-198. [available: www.medpac.gov]

Jane Gross, "The Elderly Middle Class Tries to Find Its Way in the Maze of Today's Medicaid," *New York Times*, 9 July 2005, p. A12.

Robert Pear, "Panel Calls for Big Changes in Medicaid," *New York Times* 23 November 2006, n.p.

2. Long-Term Care

Reading: Charles J. Fahey, "Meeting Tomorrow's Needs for Chronic and Long-Term Care," in *Long-Term Care and Medicare Policy: Can We Improve the Continuity of Care*, edited by D. Blumenthal, M. Moon, M. Warshawsky, and C. Boccuti (Washington DC: National Academy of Social Insurance, 2003), pp. 225-231.

Joshua M. Wiener, "The Role of States in Long-Term-Care Reform," in *Long-Term Care and Medicare Policy: Can We Improve the Continuity of Care*, edited by D. Blumenthal, M. Moon, M. Warshawsky, and C. Boccuti (Washington DC: National Academy of Social Insurance, 2003), pp. 115-119.

Jane Gross, "New Options (and Risks) in Home Care for Elderly," *New York Times*, 1 March 2007, pp. A1, A15 and "Letters to the Editor" in response, 5 March 2007.

Jane Gross, "As Parents Age, Baby Boomers and Business Struggle to Cope," *New York Times*, 25 March 2006, p. A1 et seq. and "Letters to the Editor," 31 March 2006, p. A20.

Optional: Victoria A. Freedman, et al., "Socioeconomic Disparities in the Use of Home Health Services in a Medicare Managed Care Population," *Health Services Research* 39 (No. 5, October 2004): 1277-1297.

Diane L. Gross, Helena Temkin-Greener, Stephen Kunitz and Dana B. Mukamel, "The Growing Pains of Integrated Health Care for the Elderly: Lessons from the Expansion of PACE," *Milbank Quarterly* 82 (No. 2, 2004): 257-282.

New York Times, "Keeping Elderly on the Road, But Not Behind the Wheel," 20 January 2006, p. A15.

TWELTH CLASS: April 9

Institutional Long-Term Care

1. Scope, Funding and Regulation of Institutional Long-Term Care

Reading: Medicare Payment Advisory Commission, “3A Skilled Nursing Facility Services,” and “3D Long-Term Care Hospital Services” in *Medicare Payment Policy: Report to Congress*, March 2007, (Washington DC: MedPAC), pp.164-183, 218-235. [available: www.medpac.gov]

Galen H. Smith III and William P. Brandon, “11 Private Financing for Long-Term Care,” chapter submitted for publication in *Handbook of Long-Term Care Administration and Policy*, edited by Cynthia Mara, forthcoming by CRC Press.

Charles Duhigg, “Aging, Frail and Fighting Insurers to Pay Up,” *New York Times*, 26 March 2007, pp. A1, A16.

William Hovey, “The Worst of Both Worlds: Nursing Home Regulations in the United States,” *Policy Studies Review* 17 (No. 4, Winter 2000): 43-59.

2. Alternatives to Standard Issue LTC

Reading: Packet on “Green House” Nursing Homes: Joseph Shapiro, “Reformers Seek to Reinvent Nursing Homes,” National Public Radio with excerpts from William H. Thomas, *What Are Old People For? How Elders Will Save the World* (Acton MA: VanderWyk & Burnham, 2004).

Pam Kelly, “A luxury Resort? No, A Nursing Home,” *Charlotte Observer*, 23 July 2006, pp.1A, 8A.

Randall Brown, “Consumer-Directed Care and Its Implications for State and Federal Long-Term Care Policy” paper with presentation slides 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.

James Brooke, “Japan Seeks Robotic Help to Care for Its Aging Populace,” *New York Times*, 5 March 2004, pp. A1, A4.

THIRTEENTH CLASS: April 16

Housing for the Aged, Their Living Patterns and an Amazing Financial Opportunity

Reading: Jon Pynoos and Christy M. Nishita, “The Changing Face of Senior Housing,” in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 244-262.

Stephen M. Golant, “Affordable Clustered Housing Care for Older Americans: A Category of Long-Term Care Options for the Elderly,” manuscript dated 14 December 2006, paper originally 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.

P.J. Masotti, R. Fick, A. Johnson-Masotti and S. MacLeod, “Healthy Naturally Occurring Retirement Communities: A Low-Cost Approach to Facilitating Healthy Aging,” *American Journal of Public Health* 96 (No. 7, 2006): 1164-1170.

Robert Mollica and Michael Morris, “The Massachusetts Supportive Housing Program,” Rutgers Center for State Health Policy, January 2005.

Motoko Rich and Eduardo Porter, “Increasingly, the Home is Paying for Retirement,” *New York Times*, 24 February 2006, pp. C1, C6.

FannieMae, *Money From Home: A Consumer's Guide to Reverse Mortgage Options* (Washington DC: FannieMae, n.d.), "Introduction," "1 Considering the HECM" (part), "2 Considering the Home Keeper Mortgage" (part), pp. 5-15, 31-39. (Accessible from www.fanniemae.com)

Sam Roberts, "Making the Return Trip: Elderly Head Back North: A Rise Is Seen in Moves Out of the South," *New York Times*, 26 February 2007, pp. A12.

Optional: Tom Neville, "Birds of a Feather," *New York Times*, 6 April 2007, pp. D1, D8.

FOURTEENTH CLASS: April 23

"The Status of Seniors Report," The Local Aging Network, and Charlotte-Mecklenburg Council on Aging, and the Local Aging Network

**Guest Speakers: John Highfill, Program Manager
Mecklenburg County DSS, Services for Adults Division**

**John Eller, Director
Services for Adults Division, Mecklenburg DSS**

**Debora Sparks, Executive Director
Charlotte-Mecklenburg
Council on Aging**

Reading: Mecklenburg Board of County Commissions, "Executive Review," of the *Strategic Planning Report: 2005 Status of Seniors Initiative*, October 2005, Mecklenburg County NC, pp. 1-24. Entire document is available: (<http://statusofseniors.charmeck.org>)

Jane Gross, "Geriatrics Lags in an Age of High-Tech Medicine," *New York Times*, 18 October 2006, pp. A1, A17.

FIFTEENTH CLASS: April 30

Wrap-Up and Summary

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

Reading: Theodore R. Marmor and Jerry L. Mashaw, "The Case for Universal Social Insurance," in Altman and Schactman, *Policies for an Aging Society*, pp. 169-198.

Martha B. Holstein, "A Normative Defense of Universal Age-Based Public Policy," in *New Politics of Old Age Policy*, edited by R.B. Hudson (Baltimore: Johns Hopkins University Press, 2005), pp. 23-41.

Mark V. Pauly, "The Merits of Changing to Defined Contribution Programs," in Altman and Schactman, *Policies for an Aging Society*, pp. 217-235.

Alicia H. Munnell, "The Case for Retaining Defined Contribution Programs," in Altman and Schactman, *Policies for an Aging Society*, pp. 236-265.

Joseph White, "The Entitlement Crisis That Never Existed," in Altman and Schactman, *Policies for an Aging Society*, pp. 140-165.

2. Caring, the Real Bottom Line

Reading: Deborah Stone, "Caring Communities: What Would It Take?" in *Long-Term Care and Medicare Policy: Can We Improve the Continuity of Care*, edited by D. Blumenthal, M. Moon, M. Warshawsky, and C. Boccuti (Washington DC: National Academy of Social Insurance, 2003), pp. 214-224.

Jane Gross, "Forensic Skills Seek to Uncover Hidden Patterns of Elder Abuse," *New York Times*, 27 September 2006, pp. A1, A23.

Optional: Frode Berglund, "Same Procedure as Last Year? On Political Behavior amongst Senior Citizens," *World Political Science Review* 2 (No. 1, 2005): 99-118.

SIXTEENTH CLASS: May 7—Final Exam (6:30-9:20)

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