

**The University of North Carolina at Chapel Hill
School of Social Work**

Course No: SOWO 530 (Section 001: Mondays 9:00 – 11:50am)

Course Title: Foundations of Social Welfare & Social Work
Fall 2009

Instructor: Mat Despard, MSW
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Office Hours: Mondays 12-1:30pm & Tuesdays 12–2pm
(Please request appointment as I am sometimes asked to attend meetings and events during these hours)

COURSE DESCRIPTION: Introduces public welfare policy through lecture and discussion of the purposes public welfare serves and describes the most important programs created by those policies.

COURSE OBJECTIVES

1. Demonstrate knowledge of current social welfare policies and programs in the U.S. and the ideals which shaped existing public welfare structures;
2. Identify and describe the social concerns which those structures have or have not been able to address successfully. Special attention will be given to their impact on various family types.
3. Demonstrate an understanding of the role of social work and effects of social policy on historic and contemporary patterns of social welfare service provision;
4. Rigorously evaluate existing research related to social welfare policies and demonstrate knowledge of the development and implementation of contemporary social welfare policy;
5. Demonstrate an understanding of the values and ethics of social work that guide professional behavior in the conduct of public policy activities;
6. Demonstrate skill in strategies for advocacy and social change that advance social and economic justice;
7. Identify conditions that promote or deter equal access to resources for minorities and women and be able to discuss concerns related to race, disability, gender and sexual orientation.

SKILLS BASE

By the end of the course, students will be able to:

1. Describe the historic origins and unique characteristics of the social work profession.
2. Assess clients for eligibility for major publicly funded programs and/or benefits.
3. Analyze the effects of social welfare policies on the well-being of and opportunities for lower-income individuals and families and other vulnerable populations.
4. Articulate the underlying values and principles of major public welfare policies.
5. Describe how legislative and administrative policy is made and how to influence policy development.

REQUIRED TEXTS

The three required course texts can be purchased at the Health Sciences Bookstore or online through sites like www.amazon.com or www.bestbookbuys.com:

Carlton-LaNey, I. (2001). *African American leadership: An empowerment tradition in social welfare history*. Washington, DC: NASW Press. {referred to as **ICL** in syllabus}

Davis, K. E. & Bent-Goodley, T. B. (Eds). (2004). *The color of social policy*. Alexandria, VA: Council on Social Work Education. {referred to as **DBG** in syllabus}

Gilbert, N. & Terrell, P. (2010). *Dimensions of social welfare policy*. (7th ed.). Boston: Allyn & Bacon. {referred to as **GT** in syllabus}

Additional required readings listed in “Class Schedule and Assigned Readings” below can be found ONLINE:

- 1) At the URL stated in the reading list
OR
- 2) Through an electronic academic journal accessible through UNC Libraries (<http://www.lib.unc.edu/>) marked as “**UL**” (for “UNC Libraries”)
OR
- 3) Via Blackboard (<http://blackboard.unc.edu/>) “**BB**” (login and find SOWO 530 – Section 002 choose “Assignments” and “Course Readings” folder)

RESOURCES

Course syllabus, powerpoint presentations, assignment materials and external links to useful web sites are available on Blackboard, at <http://blackboard.unc.edu>

TEACHING METHODS

While holding steadfastly to our profession’s commitment to social justice, I will encourage students to examine social issues through different political perspectives. As such, I welcome the expression of a variety of perspectives on contemporary social

issues of importance to social workers and value well reasoned and constructive dialogue. Learning can only truly occur in a space where all participants feel respected and safe. Therefore all class participants, student and instructor, will be expected to interact in a collegial manner, challenging ideas while respecting one another.

I will use a variety of instructional methods in the classroom, including use of multimedia, debates, and various small group learning activities. The classroom environment is interactive and students are expected to come prepared having done the assigned readings.

I will not go through all of my powerpoint slides in class, but they will be an effective way to help you study for the mid-term and final exams, so they should be reviewed in their entirety during your own time.

COURSE REQUIREMENTS

Requirement	% of Grade	Date/Due Date
Class Participation	10%	Ongoing
Mid-term Exam	20%	Monday, 10/12
Budget Exercise	15%	Monday, 11/2
Policy Brief/Testimony	25%	Abstract: 9/28; Paper: 11/30 Presentations: 11/30
Final Exam	30%	Friday, December 11 9am - Auditorium

The **Budget Exercise** and **Testimony Assignment** descriptions can be found starting on page 14.

The **mid-term** and **final exams** will be in-class, closed book examinations comprised of a combination of multiple choice, true/false, short answer and essay questions. The content of the examination questions will be derived both from required readings and class lectures, learning exercises and discussion.

Grade Scale

H	Clear Excellence	94-100 points
P	Entirely Satisfactory	80-93 points
L	Low Passing	70-79 points
F	Failed	<70 points

CLASS ATTENDANCE AND PARTICIPATION

It is expected that students will be active members of the class. Therefore, the following grading rubric will be used for class participation.

- 10 pts: No classes missed and active participation.
- 9 pts: One class missed, active participation.

- 8 pts: One class missed, inconsistent participation
7 pts: Two classes missed, active participation.
6 pts: Two classes missed, inconsistent participation.
Under 6 pts: Three or more classes missed, disengagement from class.

Only in highly extenuating circumstances (medical or family emergency) may an absence be considered excused. For any other absences, it is up to the student to get caught up by asking a classmate for notes on what was covered.

The adult learning instruction method will be used in this class. Students will be expected to have completed all reading prior to class and most of class time will focus on discussion and activities to integrate learning. This will involve both working individually and in small groups. Students are expected to be active and engaged participants in these learning activities.

Class Topic Introduction

Part of your attendance and participation grade includes introducing a class topic by responding to one of the focus questions for that class session. Students will work in small teams to help each other craft responses. Topic introductions should be brief – no more than 15-20 minutes per class – and can be done in any medium the assigned students wish: interpretive dance, political stump speech, miming, charades or just plain talking.

POLICY ON ACADEMIC DISHONESTY:

It is the responsibility of every student to obey and to support the enforcement of the Honor Code, which prohibits lying, cheating, or stealing in actions involving the academic processes of this class. Students will properly attribute sources used in preparing written work and will sign a pledge on all graded coursework certifying that no unauthorized assistance has been received or given in the completion of the work. **All written assignments should contain a signed pledge from you stating that, “I have not given or received unauthorized aid in preparing this written work.”** Credit will not be awarded for unpledged work.

Please refer to the *APA Style Guide*, *The SSW Manual*, and the *SSW Writing Guide* for information on attribution of quotes, plagiarism and appropriate use of assistance in preparing assignments. In keeping with the UNC Honor Code, if reason exists to believe that academic dishonesty has occurred, a referral will be made to the Office of the Student Attorney General for investigation and further action as required.

POLICY ON ACCOMMODATIONS FOR STUDENTS WITH DISABILITIES:

Students with disabilities that affect their participation in the course and who wish to have special accommodations should contact the University’s Disabilities Services (<http://disabilityservices.unc.edu>) and provide documentation of their disability. Disabilities Services will notify the instructor that the student has a documented

disability and may require accommodations. Students should discuss the specific accommodations they require (e.g. changes in instructional format, examination format) directly with the instructor.

POLICY ON THE USE OF ELECTRONIC DEVICES IN THE CLASSROOM

Use of electronic devices for non-class related activities (e.g. checking email, surfing, twittering – *unless it involves comments about the instructor's brilliance*, IMing, texting, blogging, playing games, etc.) is strictly prohibited. Otherwise, use of laptops is permitted if it enhances a student's learning, i.e. to help follow a presentation, as a tool for small group activities and in-class assignments or as an approved accommodation for students with disabilities (see above).

POLICY ON READING DRAFT VERSIONS OF ASSIGNMENTS

I am happy to review draft papers with the following limitations:

1. Give it to me at least one week before the assignment is due, so you can incorporate my feedback and still submit your final paper on time.
2. Provide a draft that is coherent, though it can be in outline form so I can provide feedback concerning whether you are on the right track.
3. Print your draft and hand in to me during class or email it to me.

I will email you my comments about how the draft can be strengthened, but it will not be a point-by-point list of specific instructions.

POLICY ON INCOMPLETES AND LATE ASSIGNMENTS

A paper is considered late if it is handed in any later than the start of class on the day it is due. The grade for late papers will be reduced 10% per day, including weekends. Therefore, a paper that would merit a grade of 100 on Friday will receive a grade of 70 if submitted on Monday. Similarly, a paper due at 2pm on Monday handed in at 3pm will be considered 1 day late.

A grade of **Incomplete** is given only in exceptional and rare circumstances that warrant it, e.g. family crisis, serious illness. It is the student's responsibility to request and explain the reasons for an Incomplete. The instructor has no responsibility to give an Incomplete without such a request.

EXPECTATIONS FOR WRITTEN ASSIGNMENTS

Students are expected to use good academic English; grades will be lowered for poor grammar, syntax, or spelling. Those who have difficulty writing are **STRONGLY** encouraged to contact the Writing Center (962-7710 or <http://www.unc.edu/depts/wcweb/>)

The School of Social Work faculty has adopted APA style as the preferred format for papers and publications. **All written assignments for this course should be submitted in APA format** unless otherwise noted. A summary was distributed at orientation. The web sites listed below provide additional information, though students are strongly encouraged to purchase the following text:

American Psychological Association. (2001). *Publication manual of the American Psychological Association, 5th Edition*. Washington, D.C.: American Psychological Association.

- ❑ <http://ssw.unc.edu/index.php?q=students/academic/advising> (Academic resources from the School of Social Work, including an APA quick reference guide)
- ❑ <http://www.apastyle.org/apa-style-help.aspx> (APA Style basics)
- ❑ http://owl.english.purdue.edu/handouts/research/r_apa.html (general information about documentation using APA style)
- ❑ <http://www.bartleby.com/141/> (electronic version of Strunk's *The Elements of Style* which was originally published in 1918)
- ❑ <http://www.fas.harvard.edu/~wricntr/resources.html> (The Writing Center, links to on-line reference material and many other useful sites for authors)
- ❑ <http://www.unc.edu/depts/wcweb/> (The UNC writing center—on-line and tutorial help at Phillips Annex 962-7710)

SOWO 530 Class Schedule & Due Dates - Quick Glance

Class	Date	Topic
1	8/31	Introduction & Overview
No Class – Monday, September 7, 2009 – LABOR DAY Holiday		
2	9/14	History & Context of Social Welfare Policy
3	9/21	Progressive Era Roots of Modern Social Work
4	9/28	Understanding Income, Wealth & Poverty in the U.S. * Policy Brief/Testimony Abstract Due *
5	10/5	The Modern Social Welfare System
6	10/12	* Midterm Exam *
7	10/19	The Basis of Social Allocations: <i>Who Gets Help?</i> <i>The case of social security reform</i>
8	10/26	The Nature of Social Provision: <i>What Do They Get?</i> <i>The case of 1996 welfare reform</i>
9	11/2	<u>Benefits Seminar</u> : Students share their budget assignment findings *Budget Exercise Due*
10	11/9	The Design of the Delivery System: <i>How Do They Get Help?</i> <i>The case of mental health reform in North Carolina</i>
11	11/16	Financing Social Welfare: <i>Who Pays For It?</i> <i>The case of national health care reform</i>
12	11/23	Policies to Increase Economic Opportunity
13	11/30	Testimony Presentations * Policy Briefs Due *
14	12/7	Final Exam Review Session, Course Evaluation
15	12/11 Friday	* Final Exam * 9:00am – Auditorium

CLASS SCHEDULE & ASSIGNED READINGS

Week 1:	Introduction & Overview
8/31	<ul style="list-style-type: none">• Introductions & course overview• Identify professional characteristics of social work• Identify legal origin & types of social welfare policy• Explain why social workers need to understand policy
Readings:	GT: Chapter 1: The Field of Social Welfare Policy
	<u>Focus Questions:</u> <ol style="list-style-type: none">1. Why is social welfare policy important for social workers to understand?2. What are the legal origins of social welfare policy? What are different types of policies?3. What is social work? What distinguishes it from other professions?
** No class on Monday, September 7 – Labor Day Holiday **	
Week 2:	History & Context of Social Welfare Policy
9/14	<ul style="list-style-type: none">• Describe historic & normative foundations of modern social welfare• Identify major changes in social welfare from 1932 to present• Explain how disability socially constructed & how this has changed over time
Readings:	Blau, J. (2007). Social welfare history in the United States. In J. Blau, <i>The dynamics of social welfare policy</i> (pp. 232-288). New York: Oxford University Press. (BB)
	Braddock, D. & Parish, S. L. (2001). An institutional history of disability. In G.L. Albrecht, K. D. Seelman, & M. Bury (Eds.), <i>Handbook of disability studies</i> (pp. 11-13; 29-54). Thousand Oaks, CA: Sage. (BB)
	<u>Focus Questions:</u> <ol style="list-style-type: none">1. What was significant about the New Deal era of the 1930s?2. What values & norms have shaped our social welfare system? How has it changed since the New Deal?3. How have social constructions of disability changed over time?
Week 3:	Progressive Era Roots of Modern Social Work
9/21	<ul style="list-style-type: none">• Describe the roots of social work in the late 19th and early 20th centuries• Understand the unique contributions of African-American social work pioneers• Analyze the early impact of social policies on racial and ethnic groups

Readings: **ICL:** Chapters 2-3, 6, 8
 DBG: Chapters 1-2

Focus Questions:

1. How can social work practice be described in the Progressive Era? What characteristics of Progressive era social work remain alive today?
2. What were the unique contributions of African-American social workers during the Progressive Era?
3. How did 19th and early 20th century social policies affect racial and ethnic minority groups?

Week 4: Understanding Income, Wealth & Poverty in the U.S.

9/28

- Explain different perspectives on poverty and a living wage
- Explain poverty risk factors & effects on children
- Identify and make sense of economic trends that shape opportunity

Readings: Action for Children North Carolina (2008). *Child poverty in North Carolina: A preventable epidemic*. (Economic Security Issue Brief). **(BB)**

Boushey, H. & Weller, C.E. (2005). What the numbers tell us. In J. Lardner & D.A. Smith (Eds.), *Inequality matters*, (pp. 27-40). New York: The New Press. **(BB)**

Hederman, R.S. (2008). *Census Bureau shows income gains in 2007, but poverty remains flat*. (Web Memo #2035). Washington, DC: Heritage Foundation. Retrieved July 9, 2009 from <http://www.heritage.org/Research/Welfare/wm2035.cfm>
(Note: read the US Census Bureau report first – see below).

Rector, R.E. & Johnson, K.A. (2004). *Understanding poverty in America*. Washington, DC: Heritage Foundation. Retrieved May 29, 2008 from http://www.heritage.org/Research/Welfare/upload/53977_1.pdf

U.S. Census Bureau. (2008). *Income, poverty, and health insurance coverage in the United States: 2007*. (read pp. 5-18). Retrieved July 3, 2009 from <http://www.census.gov/prod/2008pubs/p60-235.pdf> **(BB)**

Focus Questions:

1. Is poverty just about material deprivation or other phenomena?
2. Are economic opportunities getting better or worse for lower and middle-income families? Is the rich-poor gap getting better or worse?
3. How does poverty affect important outcomes for children? What factors help explain child poverty in North Carolina?
4. Is poverty *really* a problem in the U.S.? Who does it affect the most?
5. Why are wealth disparities important to understand?

Week 5: The Modern Social Welfare System

*** Testimony Abstract Due ***

10/5

- Identify the key characteristics & scope of the social welfare system
- Explain the differences among social, occupational and fiscal welfare
- Apply Gilbert & Terrell's analytical framework to major social programs

Readings:

GT: Chapter 2: The Modern Welfare State
Chapter 3: A Framework for Social Welfare Policy Analysis

Focus Questions:

1. How has the role of government in social welfare changed?
2. How do middle and upper income groups benefit from fiscal welfare?
3. On which programs do we spend the most money? What are other key characteristics of our social welfare system?
4. How we can analyze and make sense of different social welfare programs?

Week 6: Mid Term Exam – Auditorium

10/12

No assigned readings.

Week 7: The Basis of Social Allocations: *Who Gets Help?*

The case of social security reform

10/19

- Explain the key differences between universal and selective social welfare programs
- Describe the bases upon which selective social welfare programs target different populations
- Explain how means testing for social welfare programs works and describe other social allocation strategies

Readings:

GT: Chapter 4: The Basis of Social Allocations
DBG: Chapter 5: Social Security Reform & People of Color

Focus Questions:

1. Is social security in trouble? Should we fix it by changing the basis of social allocations? How would raising the eligibility age for social security retirement benefits affect different populations?
2. What are the key differences between universal and selective policies? How are people targeted for selective policies?
3. How do allocation policies seek to change behavior?
4. How did selectivity creep into Medicare, a universal program?

Week 8: The Nature of Social Provision: *What Do They Get?*

The case of 1996 welfare reform

10/26

- Compare and contrast cash vs. in-kind benefits
- Analyze the values & policy goals associated with different forms of social provision
- Assess the outcomes of welfare reform

Readings:

GT: Chapter 5: The Nature of Social Provision

DBG: Chapter 11: African-Americans and Welfare Reform.

Besharov, D. (2006). *Two cheers for welfare reform*. University of Maryland, School of Public Policy, Welfare Reform Academy. Retrieved August 10, 2007, from:
<http://www.welfareacademy.org/pubs/welfare/twocheersforwelfarereform.pdf>

Blank, R.M. (2007). Improving the safety net for single mothers who face serious barriers to work. [Special Issue] *The Future of Children*, 17,2: 183-197. **(BB)**

Focus Questions:

1. How did welfare reform affect what recipients of TANF receive compared to AFDC?
2. Did Welfare Reform work? Why or why not? How should TANF be changed, if at all?
3. What does Blank (2007) say needs to be different about social provision for single mothers with work barriers?

Week 9: Benefits Seminar: Comparing Findings from the Budget Assignment

11/2

- Identify major public social welfare programs that help meet basic needs of lower-income households
- Explain how the private sector also meets basic needs
- Understand common benefit pairings

Readings:

No assigned readings, yet students will have done research regarding public and private sector social welfare programs to complete the Budget Assignment. Students will compare and discuss their findings in small groups.

Focus Questions:

1. What are the key social welfare programs that social workers help clients access on a regular basis?
2. How are these programs accessed by households in need?
3. What private sector resources exist to meet basic needs? What are the limitations of such resources?

Week 10: The Design of the Delivery System: *How Do They Get Help?*

The case of mental health reform in North Carolina

11/9

- Understand privatization, decentralization & managed care effects on serviced delivery, including access & fragmentation
- Examine professional & paraprofessional roles in service delivery
- Develop ideas for improving service delivery

Readings:

GT: Chapter 6: The Design of the Delivery System

DBG: Chapter 7: Mental Health Policy and People of Color

Scheyett, A. (2008). *Mental health reform in North Carolina: A cautionary tale*. (PowerPoint presentation). University of North Carolina at Chapel Hill School of Social Work. **(BB)**

Focus Questions:

1. How has mental health reform in North Carolina changed the delivery system design? How has this affected access to care?
2. How are racial and ethnic minorities differentially affected by mental health policy in the U.S.?
3. How do spatial and financing characteristics of social service provision affect access to services?
4. How can service delivery be designed better to increase access, coordination and effectiveness?

Week 11: Financing Social Welfare: *Who Pays For It?*

The case of national health care reform

11/16

- Explain the major ways in which social welfare programs are funded
- Compare private and public funding strategies and levels
- Analyze funding strategies based on solvency & tax fairness
- Explain how funding is devolved and conditioned

Readings:

GT: Chapter 7: The Mode of Finance: Sources of Funds

Note: *Additional readings re: health care reform legislation will be assigned closer to this class session, but no more than two weeks prior so that students are reading the latest legislative information, which is changing every week.*

Focus Questions:

1. What are the primary ways in which we can pay for health reform? Which funding strategies are the fairest?
2. Can a market based approach result in lower health care costs to make health care more affordable or does government need to pay for more coverage?
3. What are key conservative and liberal interests and positions on health care reform? What political constituencies are reflected?

Week 12: Policies to Increase Economic Opportunity

11/23

- “Nudging” policies to change economic decisions
- Understand the self-help tradition among African-Americans
- Analyze differences between asset development and income assistance policies
- Analyze contemporary strategies to reduce poverty

Readings:

ICL: Chapter 7

Haskins, R. & Sawhill, I. (2007). Introducing the issue: The next generation of antipoverty policies. [Special Issue] *The Future of Children*, 17,2: 3-16. **(BB)**

Shapiro, T. (2004). Conclusion: Assets for equality (pp. 183-204). In *The hidden cost of being African-American: How wealth perpetuates inequality*. New York: Oxford. **(BB)**

Podcast: National Public Radio (NPR) All Things Considered Report on economic “nudging” policies **(BB)**

Focus Questions:

1. What does the field of behavioral economics have to do with social policies?
2. How did Marcus Garvey and Lawrence Oxley promote self-help among African-Americans? How did their actions differ from government efforts to provide assistance?
3. What makes asset development policies different than income maintenance and emergency assistance programs?
4. What historical injustices do asset development policies seek to ameliorate?

Week 13: Policy Presentations * POLICY BRIEFS DUE *

11/30

Readings:

No assigned readings. Students will present their policy brief testimonies in small group sessions.

Week 14: Review Session, Course Evaluation

12/7

Readings:

None.

FINAL EXAM:

Friday, December 11 - 9:00am – Auditorium

ASSIGNMENT: Budget Exercise – (15% of final grade)

DUE: November 2, 2009 (results will be shared in small groups during class)

General scope of the assignment:

As social workers you will often work with individuals who are attempting to survive with very little income, assets and other resources. They face difficult choices about how to spend their limited dollars to meet their basic needs. This exercise is intended to help you learn more about the struggles and dilemmas that families face to meet their basic needs and the public and private sector resources that can help.

Instructions:

1. You will be provided with a description of a family living in a particular North Carolina county and their income and other resources.
2. Complete the **household budget worksheet** in the “Budget Assignment – Household Budget Template” file on Blackboard. Use information in the description to record income and resources posted on Blackboard to help you estimate household expenses for your family to meet its basic needs. Be sure to consider family size and the particular county. The expense amounts do not need to be exact. Reasonable estimates, such as for an electric bill, are fine.
3. Research different public and private sector monetary and in-kind **sources of assistance** in the identified county for which you think your family is eligible. Use links on Blackboard to help you. Be sure to carefully examine eligibility rules for public assistance programs (Food Stamps, Section 8, etc.) and don’t overlook important sources of assistance from the private sector (local nonprofits, faith communities, etc.). You do not need to obtain eligibility confirmation from local agency representatives. However, you need to do enough research to make reasonable assumptions about eligibility.
4. Complete the **resources worksheet** in the same template document. Be sure only to list sources of assistance for which you are very confident that the family would be eligible.
5. For both worksheets, be sure to review the example and guidelines in the file.
6. **Summary & Conclusions.** Write a brief paper (no more than 2 double-spaced pages, excluding references) in APA format that addresses the following:
 - a. Eligibility and resources notes. Include any information that you feel is needed to help explain your findings, such as any assumptions you had to

make to determine eligibility or difficulty you experienced in finding resources.

- b. The bottom line: What can you conclude from your examination of expenses and resources? Is this a family that can meet its basic needs with help? Why or why not?
- c. Your learning: What new insights did you gain and/or suspicions did you confirm about the social welfare system in doing this assignment?
- d. References: List the sources of information you used to complete this assignment, including websites and personal communication.

Students will share their findings with one another in class on November 2, 2009 to compare what they learned. Printed materials should be submitted to the instructor at the end of class to meet the assignment deadline.

Grading Guide:

14-15 pts: Reasonable household expense estimates are consistently used. Public and private sector sources of assistance were thoroughly researched. Findings are well explained, conclusions reflect findings and student identified new learning.

12-13 pts: Some household expense estimates are off and/or public and private sector sources of assistance were overlooked. Summary and conclusions section lacks important detail.

11 pts or

Fewer: Expense estimates are way off and significant sources of assistance were overlooked. Generally speaking, submitted materials reflect little care and effort put into the assignment.

Work on this assignment is strictly independent. Students may not receive help from one another. Honor code is in full effect.

ASSIGNMENT: Policy Brief/Testimony – (25% of final grade)

DUE: September 28, 2009 (Abstract)

November 30, 2009 (Written policy brief & verbal presentation)

Students will choose an active state or federal bill (no law has been passed) that addresses a social welfare issue and do the following:

1. Write a **policy brief** that provides evidence and arguments in support of or opposition to the bill and educates policy makers about the issue.
2. Present key findings from the policy brief in class on **November 30, 2009** in the form of a **mock expert testimony** before a legislative panel or committee.

The bill must address an issue that impacts the quality of life for a disadvantaged group of people. Students will submit a one paragraph abstract by **September 28, 2009** that:

- Identifies the bill and provides a web link to it;
- Identifies the student's position (for/against); and
- Includes a brief justification for why the bill affects an important social welfare issue;

Policy Brief:

The purpose of a policy brief is to educate legislators and other decision-makers about an important issue that is the subject of the bill that you either support or oppose. The policy brief should be factual, evidence-based and logically tied to and supportive of the mock testimony you will provide. In other words, it is the substance that backs up your testimony.

Use Blackboard and do your own research to understand how policy briefs are written. The definition of a policy brief is *a document which outlines the rationale for choosing a particular policy alternative or course of action in a current policy debate*. In general, a policy brief has the following characteristics, which should be reflected in what you submit:

- **Concise** – legislators will not read lengthy, verbose reports;
- **Timely** – addresses an issue of current public concern;
- **Action-oriented** – problem can clearly be addressed through legislation;
- **Evidence-based** – data is used and analyzed;
- **Professional** – rational, without insulting, divisive or inflammatory rhetoric;
- **Feasible** – a problem(s) that can actually be solved or improved;
- **Accessible** – free of jargon; clear, understandable language;

The **policy brief** should be **3-6 pages** (any space format) in length, including charts, tables and graphs but excluding references. For this assignment, with the exception of in-text and bibliographic references, APA format is waived. Look at examples of briefs to see how they are formatted to look professional, accessible, interesting, etc.

Sources of background information and supporting data

Like any expert preparing a policy brief to support your legislative testimony, you will rely primarily on the evidence generated by sound research on your topic. For your policy brief, you must rely on scholarly sources, using **NO FEWER** than:

- **4 articles** published in peer-reviewed research journals. If you are unsure whether an article is from such a journal, ask the instructor.
- **3 reports published by at least two think tanks** or philanthropic and/or research organizations (e.g., Kaiser Foundation, Robert Wood Johnson Foundation, Children's Defense Fund, Heritage Foundation, American Enterprise Institute, Institute for Women's Policy Research, Commonwealth Fund, Brookings Institute, Urban Institution, Annie E. Casey Foundation, Families USA).
- **2 substantive reports from governmental agencies.** These may be generated by federal or state sources. Good federal sources for social welfare data include: U.S. Census Bureau, the General Accounting Office, Office of Management and Budget, the Congressional Budget Office, National Institutes of Health, the Department of Health and Human Services, and its constituent agencies.

You may use more references than these **minimum** requirements, but ***all*** cited material must be drawn from these scholarly sources. "Popular culture" sources are not acceptable, such as newspapers, websites, blogs and magazines. A reference page in APA format should be included.

Paula Hinton, a fabulous reference librarian at the Davis Library, has created a website of sources useful for securing social welfare policy materials. You may access this website at: <http://www.unc.edu/~pphinton/swpolicy.html>

In addition, a document entitled "**Scholarly Sources**" can be found on Blackboard under "Course Documents". This contains several web links to government and foundation data and research sites.

Policy briefs must be submitted to the instructor at the end of class on **November 30, 2009**. See Blackboard for a grading guide.

Mock Expert Testimony

Students will make verbal presentations of the key findings from their policy briefs to fellow students who will act as legislative panel or committee members in class on **November 30, 2009**.

Testimonies will be provided in concurrent sessions during class comprised of 6 to 9 students. While the testimony presentation will not be evaluated, it is an assignment requirement. Failure to present the testimony or evidence that the student did not take this part of the assignment seriously will result in a grade reduction. The purpose of the testimonies is for students to gain public speaking experience in an advocacy role.

You might wonder, “When will I ever provide legislative testimony as a social worker?” The purpose of this assignment is broader; you will gain experience in articulating and justifying a well-reasoned argument concerning an issue about which you are passionate. This is a skill that will prove useful in a variety of settings – speaking before a Board of Directors of your agency, a panel of United Way volunteers, a foundation program officer, city council, etc.

Preparing your Testimony

You will need to make the logical, financial, and emotional case for your perspective on the proposed legislation. You have the difficult task of persuading a body of individuals who generally will lack knowledge and experience in your subject area. As such, you must try to avoid jargon, be clear and concise, persuasive and authoritative.

You must inform the mock legislative panel a copy of the bill you are addressing no later than **November 23, 2009** and a statement of whether you will oppose the bill. This information can be emailed.

Giving your Testimony

You will have no more than **5 minutes** to give your testimony, followed by up to **5 minutes** of questions and answers from the legislative panel. You **MUST** practice your testimony in advance to ensure that you will not exceed the time limit, or fail to adequately use the opportunity to address the legislators. Like real legislators, your panel may or may not have knowledge of your subject area. Your job is to present your testimony in a compelling way.

Legislative Panel Role

You will play the role of a legislator hearing testimony on a bill from a fellow student. Your job will be to question your peer about her or his testimony. Your questions should be thoughtful and probing. In playing your role as a legislator, you **oppose** the position supported by the person testifying before you, regardless of your personal feelings about the issue.