

SCHOOL OF SOCIAL WORK
College of Human Ecology
Syracuse University

FALL 2008

SWK 778: POLICY PRACTICE AND ADVOCACY

Distributed August 27, 2008

Adjustments will be made during the course and will be posted on Blackboard

COURSE SYLLABUS

Course Title: Policy Practice and Advocacy

Times and Place: Wednesdays 3:45 – 6:30 Sims 429

Credit Hours: 3

Instructor: Eric Kingson

Office Location: Sims 401

Office Telephone: 443-1838

Office hours: Tuesdays 3:45 – 5:00; Wednesdays 2:00-3:15 & by appointment

Email: erkingso@syr.edu

CATALOGUE DESCRIPTION

Social policy analysis, planning and advocacy knowledge, methods and skills applied to social reform and social change in health and social welfare arenas. Prerequisite: SWK 611 or permission of instructor

COURSE DESCRIPTION

This course provides knowledge of policy practice and related planning/policy analysis theory, methods and skills applicable to social reform efforts in organizational, community and political settings. An advanced offering within the School of Social Work's Community Organization, Policy, Planning and Administration concentration (COPPA), it is open to students in the School's Individuals, Families and Groups (IFG) concentration and, on a selected basis, to other Syracuse University graduate students.

The course explores technical, analytic, interpersonal and political skills that enhance effective participation in the reform process. Readings, exercises and assignments are directed at developing 1) understanding of the logic of policy inquiry, 2) capacity to identify and organize policy-relevant information/data, 3) methods of analytical and quantitative reasoning, and 4) communication skills, most significantly various forms of policy writing. The course seeks to enhance the capacity of students to 1) gather policy-relevant information in a timely manner through the use of resources available in government document libraries, public agencies, NGOs, other private-sector organizations and the internet. Students are challenged to apply policy practice and advocacy skills in ways that address the needs of at-risk populations, respond to social problems (e.g., poverty, discrimination, access to care) and promote social justice. Assignments and exercises group exercises directed at strengthening the ability of students to synthesize and disseminate policy-relevant information via press releases, op eds, memoranda, fact sheets, testimony, Powerpoint presentation, policy reports and advocacy case statements. Policy analysts, community organizers, planners, advocates, and human service and health administrators will find the content relevant to their professional practice.

COURSE OBJECTIVES

a. Knowledge Objectives

- An understanding of the inter-relationship between intellectual and political processes in the development and implementation of policies and programs
- An understanding of the quantitative and qualitative techniques of policy practice as applicable to various stages of the development and implementation of policies and programs
- An understanding of the multiple roles and points of intervention for policy practitioners, policy analysts, planners, advocates and researchers in social reform, program/ policy development and program/policy implementation.

b. Skill Objectives

- Increased ability to ask the "right questions" so as to avoid technically sound solutions for the wrong problems
- Increased ability to assess distributive and ethical consequences of proposed policy options
- Increased ability to apply quantitative and qualitative reasoning techniques
- Increased ability to communicate policy analysis and research findings via written and oral communication
- Ability to use the Current Population Survey (CPS) and other survey data available on the internet for statistical analysis and data presentation and
- Increased understanding of the utility of policy-assessment tools (e.g., demographic and economic projections, budgetary projections, simulation models).

c. Value Objectives

- Increased awareness of the importance of applying research techniques to strengthen and reform social welfare institutions and policies, especially those of greatest concern to populations at substantial risk
- Increased awareness of the importance of applying research techniques in ways that examine the outcomes of practice and of policy and programs with special attention to issues of ethnicity, gender, race and sexual orientation
- Increased awareness of the importance of using policy practice and research techniques to advance social, economic and racial justice
- Increased awareness of the importance of using policy practice and research techniques as part of a commitment to assessing one's own practice and to utilizing research results to strengthen social work practice and address social justice issues.

TEXTBOOKS AND OTHER READING MATERIAL

Assigned Text: Available at Orange Bookstore

Jansson, B. (2008), *Becoming an Effective Policy Advocate: From Policy Practice to Social Justice*, 5th edition, (Pacific Grove, CA: Brooks/Cole Publishing Company)

Recommended Texts:

Dunn, W.N. (2003). *Public policy analysis*. Englewood Cliffs, NJ: Prentice Hall, Inc.

Patton, C.V. & Sawicki, D.S. (1993). *Basic Methods of Policy Analysis and Planning*. Englewood Cliffs, NJ: Prentice Hall, Inc.

2008 *Statistical Abstract of the United States*. Washington, DC: U.S. Government Printing Office.
<http://www.census.gov/prod/www/statistical-abstract.html>

Selected GIS Internet References:

Syracuse University Maps on Line <http://www.mapsonline.net/syracuse/>

Syracuse University Community Geography

http://www.maxwell.syr.edu/geo/community_geography/index.html

Syracuse University GIS Lab Site <http://libwww.syr.edu/information/mgi/gis.html#data>

Lewis Mumford Center MapNY <http://mumford.albany.edu/census/index.asp>

General site for linkages to government GIS sites <http://gos2.geodata.gov/wps/portal/gos>

HUD E-MAPS Site <http://egis.hud.gov/egis/>

Environmental E-MAPS Site <http://www.epa.gov/enviro/html/em/index.html>

National Center for Health Statistics <http://www.cdc.gov/nchs/gis.htm>

Geographical Information System for Health

New York State Clearing House <http://www.nysgis.state.ny.us/>

American Religious Data Site <http://www.thearda.com/>

Justice Technology Information Network <http://www.nlectc.org/cmap/>

University of Indiana GIS and Other Map Resources on the Web <http://www.ulib.iupui.edu/subjectareas/gis>

Selected Internet References (An extended list will be made available on blackboard):

Along with library holdings of journals, books and reports internet sources have become an important resource for policy analysts, planners and researchers. Many reports, descriptive information, statistical data, newspapers such as the *New York Times* (<http://www.nytimes.com/>) and some journal articles are on the web. Hence, the internet is an important and often easily available *supplement* to your library research. As with library research, you need to be discerning when selecting material off the web. In other words, just because something is published on the web, does not mean it provides accurate information.

Syracuse University Maps and Government Documents Library

<http://libwww.syr.edu/information/mgi/index.html>

Center on Budget & Policy Priorities <http://www.cbpp.org/>

Children's Defense Fund <http://www.childrensdefense.org/>

Citizen's Access to New York State Government Agency websites

<http://www.nysegov.com/citguide.cfm?superCat=102&cat=449&content=main>

Community Toolbox http://ctb.ku.edu/tools/en/sub_section_main_1266.htm

Electronic Advocacy <http://www.policymagic.org/electron.htm>

FEDSTATS access to statistical data of all federal agencies <http://www.fedstats.gov/>

Food Research Action Center <http://www.frac.org/index.html>

General Accounting Office-excellent source for GAO reports <http://www.gao.gov/>

House Committee on Ways and Means Committee Prints, 106th – 110th Congress – This is an important search site which enables you to search the Green Book, a compilation and description of most of the nation's income and health security programs plus much more security

<http://www.gpoaccess.gov/wmprints/index.html>

Library of Congress <http://lcweb.loc.gov/homepage/lchp.htmls>

Moving Ideas: Connecting You To The Progressive Community www.movingideas.org

National Association of Social Workers <http://www.naswdc.org/>

National Association of Social Workers New York State <http://www.naswnys.org/>

New York State Assembly - Green Book – This provides overviews of the financing and recent legislative changes for all state government programs in New York State -

<http://assembly.state.ny.us/Reports/WAM/2008Green/>

Onondaga County Government Agencies <http://www.ongov.net/>

Onondaga County Legislature <http://www.ongov.net/Legislature/>

Statistical Abstract of the United States <http://www.census.gov/compendia/statab/>

Thomas Legislative Information on the Internet <http://thomas.loc.gov/home/thomas2.html>

United Nation's homepage <http://www.un.org/>

U.S. Bureau of the Census <http://www.census.gov/>

America FactFinder <http://factfinder.census.gov/home/saff/main.html? lang=en>

White House <http://www.whitehouse.gov/>

World Health Organization <http://www.who.int/en/>

World Wide Web for Social Workers <http://www.nyu.edu/socialwork/wwwrsw/>

ACADEMIC REQUIREMENTS, GRADING AND EVALUATION

A. Assignments, Due Dates and Grading (*Some adjustments may be made during the semester*)

Best way to say this...

I want to ask a lot of each of you, because I would like to see you leave this course with some very concrete skills as well as with an understanding of how to be an effective policy advocate/practitioner/analyst.

I would very much like to see you connect this course to an existing policy/programmatic questions or policy advocacy effort of interest to you and/or your field placement.

I would encourage you to approach the course assignments as learning experiences.

In consultation with me and by the 4th class, I would like you to select a project topic and method of analysis that reflects your learning needs and interests. I will make myself available to work with you as questions arise.

In addition to being involved in a semester-long policy analysis, policy advocacy project or white paper, there will also be a number of skill-building assignments, some of which can feed into your projects:

LIST OF ASSIGNMENTS

- 1) Letter to your future self *Due September 3 (5% of grade)*
- 2) Analysis of Policy Advocacy by a Non-Profit Organization *Due September 10 (5%)*
- 3) First cut problem definition *Due September 24 (10%)*
- 4) Agency/community profile *Due October 8 (10%)*
- 5) Memo to newly-elected member of Congress about federal budget deficit *Due October 22 (10%) Assignment will be emailed to you at 5:00 pm October 21*
- 6) Talking points for a political candidate *Due November 5 (10%)*

- 7) **Testimony or Case Statement or Options or Field-Related Memo** *Due November 12 (20%)*
8) **Individual or 2-person project** *Due one week in advance of the day you present (30%)*

This assignment asks that you a) examine an important policy/programmatic issue, assessing options and making recommendations; b) develop a case statement and supportive materials to advance a significant policy proposal or c) develops white paper that addresses a problem or policy question of concern to a client (e.g., an agency, advocacy group, politician, for-profit human service provider or political jurisdiction), (40% of grade). The first complete draft of your report will be due one week prior to your presentation. Members of the class will be expected to read each report and provide written feedback to each group (placing a copy of this feedback in your exercise folder). Each individual or group will then be expected to revise their report, taking into consideration the feedback given on the first draft.

Class participation – including attendance, preparation and involvement in discussions – can influence final grades, by raising them or lowering a final grade by one-half of a letter grade.

Written guidance – including elaborations of some assignment expectations, examples and information about how to write memos, testimony, op eds and reports – will be made available on the course’s Blackboard website.

B. Course Expectations & Class Participation

ELECTRONIC COPY OF ALL ASSIGNMENTS SHOULD BE SENT TO THE DIGITAL DROPBOX ON BLACKBOARD BEFORE THE BEGINNING OF THE CLASS THAT THEY ARE DUE. HARD COPY SHOULD ALSO BE TURNED-IN AT THE START OF CLASS.

Students are expected to complete assigned readings prior to class, attend classes, participate in class discussions, complete assignments on time, be a full participant in their group project and do outside research (including gathering and reading additional materials and possibly interviewing key actors, as appropriate).

Classroom lectures and discussions will be used to clarify, supplement and integrate the assigned readings. It is, therefore, imperative that assignments be read before each topic is taken up in class and reviewed afterward. Since course content includes knowledge and learning of students as expressed in class discussion, **CLASSROOM ATTENDANCE AND PARTICIPATION IN CLASS DISCUSSION ARE NECESSARY.**

STUDENTS WILL BE EXPECTED TO ACCESS AND PRINT OUT MANY OF THE REQUIRED READINGS OFF OF THE INTERNET. URLs ARE PROVIDED. YOU WILL NEED TO DOWNLOAD ADOBE READER TO READ PDF DOCUMENTS. WEB-BASED DOCUMENTS WILL BE ADDED THROUGHOUT THE COURSE.

NOTE: All written assignments are required to follow the APA Publications Manual style, especially with regards to proper citation of direct quotes. We will go over this briefly in class. Please see the instructor if you miss this discussion or if you have any questions about what constitutes proper citation and plagiarism. **General expectation: use of APA format for references and inclusion of page numbers (and quotation marks) for all direct quotes. Quotation marks *must* be used whenever four or more words are drawn verbatim from another author. The one exception concerns longer passages (e.g., quotes involving two or more sentences) which may be set off in a way (i.e., indented and single spaced with reference or footnote with page number) that indicates that it is a passage drawn from another author. When accessing material on a website include the date the material was accessed and the *exact* internet address of sources you are referencing.**

Oh Yes... PLEASE – NO EMAILING, TEXT-MESSAGING OR WEB-BROWSING IN CLASS. PLEASE TURN OFF YOUR CELL PHONES, UNLESS YOU NEED TO BE AVAILABLE FOR AN IMPORTANT CALL (E.G., TO MAKE YOURSELF AVAILABLE AS AN EMERGENCY CONTACT FOR A CHILD’S SCHOOL).

C. Grading

See above -- Assignments, Due Dates and Grading

D. Evaluation of course

At the end of the semester students will be asked to fill out the university course evaluation instrument. Comments and suggestions will be welcomed throughout the course. **Please feel free to make suggestions throughout the course.**

E. Disability Accommodations

Students who may need special considerations related to a disability should make an appointment to see the instructor during office hours.

Students who are in need of disability-related academic accommodations should register with the Office of Disability Services (ODS), 804 University Avenue, Room 309, 315-443-4498. Students with authorized disability-related accommodations should provide a current Accommodation Authorization Letter from ODS to the instructor and review those accommodations with the instructor. Accommodations, such as exam administration, are not provided retroactively; therefore, planning for accommodations as early as possible is necessary. For further information, see the ODS website, <http://disabilityservices.syr.edu> .

F. International Students

While the large majority of examples of policies in the class are drawn from United States experiences, the policy issues we address; e.g., income inequality, child poverty, population aging, tax policy, healthcare cost, quality, and access are transnational in scope. Therefore, for your policy analysis paper, you are encouraged to select a social policy topic of interest to you as it applies to your national situation. (If you choose to analyze a social policy from your country, please be aware that all your references should be available in English.)

G. Syracuse University Academic Integrity Policy

The Syracuse University Academic Integrity Policy holds students accountable for the integrity of the work they submit. Students should be familiar with the Policy and know that it is their responsibility to learn about instructor and general academic expectations with regard to proper citation of sources in written work. The policy also governs the integrity of work submitted in exams and assignments as well as the veracity of signatures on attendance sheets and other verifications of participation in class activities. Serious sanctions can result from academic dishonesty of any sort.

For more information and the complete policy, see <http://academicintegrity.syr.edu>

COURSE SCHEDULE, DATE , TOPIC & READINGS

AUGUST 27: CLASS 1 - POLICY PRACTICE, POLICY ANALYSIS & POLICY ADVOCACY: DEFINITIONS, RATIONALES & DISCUSSION OF PROJECTS

GUEST LECTURER: PROFESSOR ALEJANDRO GARCIA

- A. DISTRIBUTION OF COURSE OUTLINE
- B. IDENTIFICATION OF READINGS AND WRITTEN ASSIGNMENT DUE ON SEPTEMBER 3
(see assignment 1(A Letter to Your Future Self) at end of syllabus)
- C. HOW SOCIAL WORKERS MAKE CHANGE THROUGH POLICY PRACTICE AND ADVOCACY
- D. AARP'S POLICY DEVELOPMENT AND LEGISLATIVE ADVOCACY
- E. DISCUSSION

SEPTEMBER 3: CLASS 2 - GETTING STARTED: POLICY PRACTICE ROLES AND APPROACHES

Assignment due September 3 – Letter to Your Future Self – One, single-spaced page is sufficient.

- A. OVERVIEW OF COURSE AND POSSIBLE PROJECTS
- B. POLICY PRACTICE OVERVIEW
 - Definition of Policy Practice
 - Rationale and underlying values
 - Types of Policy Practice
 - Jansson's Approach to Policy Practice
 - Principles to keep in mind
 - Characteristics of Policy Practice/Analysis/Research
- C. HISTORICAL/VALUE CONTEXT
 - Values, Ideology, Ethical Choice, Social Justice and Social Reform
 - Historical Roots/Relationship of Planning Theories to Policy Analysis and Practice
 - Policy Advocacy Across National Borders
- D. DISCUSSION OF YOUR VISION AND GOALS RE; LETTER TO FUTURE SELVES

Readings:

Jansson, B. (2008), *Becoming an Effective Policy Advocate: From Policy Practice to Social Justice* (Pacific Grove, CA: Brooks/Cole Publishing Company), chapters 1, 2 and 5 - "Joining a Tradition of Social Reform," "Articulating Four Rationales for Engaging in Policy Advocacy," and "Expanding Policy Advocacy Across National Borders." 1-75 and 156 – 181.

SEPTEMBER 10: CLASS 3 - SKILLS, COMPETENCIES AND NONPROFIT INVOLVEMENT WITH POLICY PRACTICE AND ADVOCACY

Analysis of Policy Advocacy by a Non-Profit Organization Due September 10

- A. SKILLS AND COMPETENCIES
 - Jansson Framework Reviewed
 - Patton & Sawicki Framework Reviewed
 - Styles
 - Approaches
 - Accumulating and using power

- B. NON-PROFIT INVOLVMENT WITH POLICY PRACTICE
 - Generations United Website and Policy Practice
 - Discussion of the Non-Profit You Researched and Key Lessons
- C. DISCUSSION OF STUDENT PROJECT TOPICS

Readings:

Jansson, B. (2008), *Becoming an Effective Policy Advocate: From Policy Practice to Social Justice* (Pacific Grove, CA: Brooks/Cole Publishing Company), chapters 3 & 4 , “Obtaining Skills and Competencies for Policy Advocacy,” and Understanding the Ecology of Policy in Governmental, Electoral, Community, and Agency Settings,” 77 -109.

Patton, C.V. & Sawicki, D.S. (1993). *Basic Methods of Policy Analysis and Planning*. Englewood Cliffs, NJ: Prentice Hall, Inc., excerpts from chapters 1 & 2 - "The Need for Simple Methods of Policy Analysis and Planning," "The Policy Analysis Process" - 1-6; 46-65. (*This reading will be handed out to students.*)

Read material from Generations United Website www.gu.org AND Be Prepared to discuss mission, policy practice approach, tools, etc.

Mission <http://www.gu.org/about5161176.asp>

History <http://www.gu.org/about5161175.asp>

Public Policy Agenda for the 110th Congress <https://exchange.syr.edu/exchange/>

Pages i – v , 12 (nutrition programs), 18, 19

Fact Sheet: The Stake of Children and Youth in Social Security

<http://www.gu.org/documents/A0/GUStakeChildrenSSFactSheet.pdf>

Social Security Debate: Fundamental Values at Stake

<http://www.gu.org/documents/A0/TheSSDebateValuesAtRisk.pdf>

Fact Sheet: Grandparents Raising Grandchildren: Housing Needs and Challenges

<http://ipath.gu.org/documents/A0/Housing.pdf>

SEPTEMBER 17: CLASS 4 - POLICY PRACTICE CONTEXTS AND BUILDING AGENDAS

A. GOVERNMENTAL, COMMUNITY AND AGENCY SETTINGS

Policy Settings

Actors

Factors

Processes

B. BUILDING AGENDAS

Readings:

Jansson, B. (2008), chapters 4 & 6 “Understanding the Ecology of Policy in Governmental, Electoral, Community, and Agency Settings,” and "Committing to an Issue: Building Agendas,” 109-155; 183-215.

Karger, H. J. & Stoesz, D. *American Social Policy*, 5th ed (2006). NY: Longman. Chapter 2
 “Social Welfare Policy Research: A Framework for Policy Analysis,” 26-37.

Read FRAC summary of “School Breakfast in America's Big Cities” report

Read executive summary of “School Breakfast in America’s Big Cities” and skim rest of report.

<http://www.frac.org/pdf/urbanbreakfast07.pdf>

Read Press release of report

http://www.frac.org/Press_Release/08.07.07.html

and skim news articles that resulted from report

<http://www.frac.org/html/news/urbanbreakfast2007.html>

SEPTEMBER 24: CLASS 5 - DEFINING THE PROBLEM

First cut problem definition assignment Due September 24

- A. UNDERSTANDING THE DYNAMICS OF DEFINING THE PROBLEM
- B. DESCRIBING THE PARAMETERS OF THE PROBLEM WITH NUMBERS
 - Back of the Envelope Calculations (in class exercise)
 - Using Tables, Charts and Graphics to Tell a Story
- C. DISCUSS CARR ET. AL. REPORT
- D. DISCUSSION OF PROFILING REPORT
- E. DISCUSSION OF THE PROBLEMS BEING ADDRESSED IN YOUR ASSIGNMENT & PROJECTS

Readings:

Carr, Bonnie, Kelly Jones, Cheryl Miron & Marilyn Brown-Shakir (December, 2001). Improving Chemically Dependent, Pregnant Women's Access to Substance Abuse Treatment by Reducing Fragmentation of Service. Smith, Jennifer (2001). Group project report prepared by students in SWK 778. Includes my comments on first draft, op ed, fact sheet and implementation/strategy plan at back of report. Executive summary not included.

Jansson, B. (2008), chapter 7, "Analyzing Problems in the First Step of Policy Analysis," 183-215.

Patton & Sawicki (1993), from chapter 4 - "Verifying, Defining and Detailing the Problem" - 147-158. (*This reading will be handed out to students.*)

Eric Lightblau (August 23, 2005) Profiling Report Leads to a Demotion *New York Times*
<http://www.nytimes.com/2005/08/24/politics/24profiling.html> Think about the politics of information

Bureau of Justice Statistics (April, 2005) Contacts between Police and the Public: Findings from the 2002 National Survey
<http://www.ojp.usdoj.gov/bjs/pub/pdf/cpp02.pdf> Read front cover and 2-page highlights. Skim rest. What messages jump out at you from the cover? How balanced are the highlights? Think about the story that is being emphasized with regard to racial profiling. Also, review the report for format and presentation of information.

OCTOBER 1: CLASS 6 PROBLEM DEFINITION TECHNIQUES

Non- graded Exercise due for class 3: Print out and fill out the American Community Service Survey
Find it at <http://www.census.gov/acs/www/Downloads/SQuest07.pdf>

- A. GATHERING INFORMATION
 - Sources of Information
 - Government Documents Libraries
 - Statistical Abstract of the United States
 - Legislative Hearings & Other Resources
 - Public & Private data gathering organizations
- B. POPULATION DATA: LET YOUR FINGERS DO THE WALKING
 - Census Bureau: Introduction to The Census, American Community Survey and American
 - American Factfinder, Survey& Census Data, Ferret
 - Census boundaries (e.g., blocks and tracts)

Readings:

U.S. Bureau of the Census, "DataFerret Users' Guide" <http://www.thedataweb.org/support/user/index.html>
What is DataFerret <http://dataferrett.census.gov/>
U.S. Bureau of the Census, "DataFerret Tutorial," http://www.thedataweb.org/what_ferrett.html
U.S. Bureau of the Census on line mapping tools
http://factfinder.census.gov/jsp/saff/SAFFInfo.jsp?_pageId=gn7_maps
U.S. Bureau of the Census boundary maps
http://factfinder.census.gov/jsp/saff/SAFFInfo.jsp?_pageId=referencemaps&_submenuId=maps_2&geo_id=
How to find Census Tracts https://ask.census.gov/cgi-bin/askcensus.cfg/php/enduser/std_adp.php?p_faqid=15&p_created=1074730744&p_sid=IgDVv3Ki&p_essibility=0&p_redirect=&p_lva=16&p_sp=cF9zcmNoPTEmcF9zb3J0X2J5PSZwX2dyaWRzb3J0PSZwX3Jvd19jbnQ9NjYyJnBfcHJvZHM9JnBfY2F0cz0mcF9wdj0mcF9jdj0mcF9wYWdlPTEmcF9zZWYy2hfdG V4dDlob3cgZG8gaSBmaW5kIGNlbnNlcYB0cmFjdHMgMjAwMA**&p_li=&p_topview=1

Readings:

Explore Census Bureau's general website (www.census.gov), CPS homepage (<http://www.bls.census.gov/cps/cpsmain.htm>) and Data Access Tools website (<http://www.census.gov/main/www/access.html>)

U.S. Bureau of the Census, About the Data
http://factfinder.census.gov/jsp/saff/SAFFInfo.jsp?_submenuId=aboutdata_0&_pageId=censuses_surveys

U.S. Bureau of the Census, American Community Survey
<http://www.census.gov/acs/www/SBasics/What/What1.htm>
Also see <http://www.census.gov/acs/www/index.html>

U.S. Bureau of the Census (March 2002), Overview of Current Population Survey
<http://www.census.gov/cps/>
<http://www.bls.census.gov/cps/overmain.htm> Read Chapter 1 – Background, pdf pages 14 & 15; Also read first two pages of Chapter 3. - Design of the Current Population Survey Sample, pdf pages 22-23

U.S. Bureau of the Census, "Design of the Current Population Survey Sample" from Technical Paper No. 63RV (<http://www.census.gov/prod/2002pubs/tp63rv.pdf>) read pdf pages 22-23 (accessed on August 31, 2005).

Statistical Abstract of the United States <http://www.census.gov/compendia/statab/> and <http://www.census.gov/prod/www/statistical-abstract.html> Take 20 minutes to browse through this.

House Committee on Ways and Means Committee Prints, 104th – 109th Congress
<http://www.gpoaccess.gov/wmprints/index.html> Pay special attention to the *Green Book* Go down Website page to where you see [Browse 2004 Green Book](#) (or click on this),

Library of Congress <http://lcweb.loc.gov/homepage/lchp.html>
[Moving Ideas: Connecting You To The Progressive Community www.movingideas.org](http://www.movingideas.org)
National Association of Social Workers <http://www.naswdc.org/>
National Association of Social Workers New York State <http://www.naswnys.org/>
New York State Assembly - Green Book – This provides overviews of the financing and recent legislative changes for all state government programs in New York State
<http://assembly.state.ny.us/comm/WAM/2005Green/>
Pay special attention to browsing [Health & Mental Hygiene](#) (<http://assembly.state.ny.us/comm/WAM/2005Green/health.pdf>) and the Office of Temporary and Disability Assistance in the [Education, Labor & Family Assistance](#) (<http://assembly.state.ny.us/comm/WAM/2005Green/edlabor.pdf>) (pages 14-17 in the pdf)

Click on these URLs and skim through them to see examples of the type of information you can get on Onondaga County and most other counties/locales in the nation

Onondaga County Legislature <http://www.ongov.net/Legislature/>

Onondaga County Government Agencies [http://www.ongov.net/
http://quickfacts.census.gov/cgi-bin/cnty_QuickLinks?36067](http://www.ongov.net/http://quickfacts.census.gov/cgi-bin/cnty_QuickLinks?36067)

Examples of state agencies providing access to county/local data
http://www.omh.state.ny.us/omhweb/chartbook/table_of_contents/onondaga_toc.htm
<http://criminaljustice.state.ny.us/crimnet/ojsa/stats.htm>

OCTOBER 8 CLASS 7 – INTRODUCTION TO GEOGRAPHIC INFORMATION SYSTEMS (GIS)

Agency/community profile *Due October 8*

- A. What is GIS?
- B. Syracuse University Community Geography
- C. How do I get started?
- D. Examples/Exercises

Readings:

Carefully explore Syracuse University Maps on Line <http://www.mapsonline.net/syracuse/>
Carefully explore Syracuse University Community Geography
http://www.maxwell.syr.edu/geo/community_geography/index.html
Carefully explore Syracuse University GIS Lab Site <http://libwww.syr.edu/information/mgi/gis.html#data>
Johnson, D. & D. Mitchell (April 23, 2004). Executive Report of the Syracuse Hunger Project
http://www.maxwell.syr.edu/geo/syr_hp/Executive%20Report%20ver4-22.pdf

Syracuse Hunger Project Maps (SKIM) http://www.maxwell.syr.edu/geo/syr_hp/Maps_ver4-23.pdf

Richards, T.B, C.s M. Croner G.d Rushton, C. K. Brown, and L. Fowler, “Geographic Information Systems and Public Health: Mapping the Future,” *Public Health Reports* 1999;114:359-373 (accessed on September 3, 2003 from <http://www.healthgis-li.com/library/phr/maintext.htm>).

Speigel, A. (August 9, 2000), Testimony Before Congressional Hispanic Field Hearing, San Antonio, Texas download from <http://www.niddk.nih.gov/federal/testimony/sanantonio00.htm> (SKIM)

GIS.Com, ”Geographic Information Systems ‘GIS’” <http://www.gis.com/whatisgis/whatisgis.pdf>, (accessed September 3, 2003) View Slide Show
Pennsylvania Spatial Data Access <http://www.pasda.psu.edu/tutorials/gisbasics.asp> , (accessed August 25, 2008) (SKIM after viewing GIS basics)

Click on these URLs and skim through them to see examples of the type of available GIS data:

Lewis Mumford Center MapNY <http://mumford.albany.edu/census/index.asp>
Syracuse University GIS Lab Site <http://library.syr.edu/information/mgi/gsic.html>
General site for linkages to government GIS sites <http://gos2.geodata.gov/wps/portal/gos>
HUD E-MAPS Site <http://egis.hud.gov/egis/>
HUD Environmental E-MAPS Site <http://www.epa.gov/enviro/html/em/index.html>
National Center for Health Statistics <http://www.cdc.gov/nchs/gis.htm>
Geographical Information System for Health

New York State Clearing House <http://www.nysgis.state.ny.us/>
National Institute of Justice Mapping & Analysis for Public Safety MAPS Resources
<http://www.ojp.usdoj.gov/nij/maps/resources.htm>

Center on Budget and Policy Priorities (July 2008), *A Balanced Approach for Restoring Fiscal Responsibility* <http://www.cbpp.org/7-9-08bud.pdf>

Pete G. Petersen Foundation (July 2008) *The State of the Union's Finances: A Citizen's Guide to the Financial Condition of the United States Government*.
<http://www.pgpf.org/resources.dyn/PGPFCitizensGuide.pdf>

OCTOBER 15: CLASS 8 - ASSESSING POLICY ALTERNATIVES AND RECOMMENDING A COURSE OF ACTION

- A. IDENTIFYING OPTIONS
- B. SELECTING EVALUATIVE CRITERIA
- C. DEVELOPING PROPOSALS/RECOMMENDING COURSE OF ACTION
- D. IN CLASS EXERCISE
- E. WRITING MEMOS AND EXECUTIVE SUMMARIES

Readings:

Miller, Stewart and Bethany Stewart (2007). "HPV Advocacy Project" Paper, Fact Sheets, Options Memo and PowerPoint Presentation prepared for SWK778, December 12. (Available on Blackboard in "Documents Folder")

Jansson, B. (2008), chapter 8, "Developing Policy Proposals in the Second, Third and Fourth Steps of Policy Analysis," 258-295.

Patton & Sawicki (1993), chapters 5, "Establishing Evaluative Criteria," 186-226.

October 22: Class 9 - - ANALYTIC TOOLS:

Memo to newly-elected member of Congress about federal budget deficit *Due October 12*
(10%) *Assignment will be emailed to you at 5:00 pm October 21*

- A. DISCUSS MEMO TO MEMBER OF CONGRESS
- B. FORECASTING TECHNIQUES FOR ANALYZING ALTERNATIVES
- C. POLICY MODELS IN POLICY ANALYSIS RESEARCH
- D. IMPORTANCE OF UNDERSTANDING THE ASSUMPTIONS INFORMING EX-ANTE FORECASTING MODELS
- E. DISCUSSION OF SOCIAL SECURITY FINANCING FORECASTING TECHNIQUES AND ASSUMPTIONS AS EXAMPLE OF HOW ANALYTIC TOOLS ARE APPLIED

Readings:

Patton & Sawicki(1993), chapter 7 - "Evaluating Alternative Policies" - 257-319

Status of the Social Security and Medicare Programs: A Summary 2008 Reports (2008).Washington, DC: U.S. Government Printing Office, read entire report <http://www.ssa.gov/OACT/TRSUM/tr08summary.pdf>
Read "Message to the Public" and 1-11, Do not confuse the pdf pagination with the pages in the

document. The first topic on page 1 is “Who are the Trustees.”

2008 Annual Report of the Board of Trustees of the Federal Old-Age and Survivors Insurance and Disability Insurance Trust Funds (2004). Washington, DC: U.S. Government Printing Office, selected pages. <http://www.ssa.gov/OACT/TR/TR08/tr08.pdf> **read** 1-18; 80-83; 85-86; 92-93; 98-99; 102-103; 132-133; 140-141; 146, 154; skim 144-165.. **Do not confuse the pdf pagination with the pages in the document.**

Other readings may be added.

OCTOBER 29: CLASS 10 -- RELATIVELY OPEN CLASS

- A. DISCUSS IMPLEMENTATION AND ASSESSMENT READINGS
- B. DISCUSS ROLE OF SOCIAL WORK POLICY PRACTITIONERS IN BALLOT-BASED ADVOCACY
- C. DISCUSS PROGRESS ON STUDENT PROJECTS

Readings:

Jansson, B.S. (2008), chapter 13 and 14, "Engaging in Ballot-Based Policy Advocacy" and "Troubleshooting and Assessing Policies," 447-535

NOVEMBER 5: CLASS 11 – POLITICAL, MEDIA & ELECTRONIC STRATEGIES FOR POLICY PRACTITIONERS, ADVOCATES AND ANALYSTS

Talking points for a political candidate *Due November 5 (10%)*

- A. DISCUSS HOW TO WRITE AND ORGANIZE PROJECT REPORTS
- B. USING THE MEDIA
- C. STAFFING COMMITTEES AND COORDINATING MEETINGS
- D. PERSUASION
- E. ELECTRONIC ADVOCACY
- F. USING POWER
- G. STRATEGIZING
- H. DISCUSS HOW TO WRITE ACTION MEMOS, TESTIMONY, CASE STATEMENTS

The Politics of Policy Practice: Power, Influence and Politics

Readings:

Jansson, B.S. (2008), chapters 9 & 10 - "Presenting and Defending Policy Proposals," "Developing and Using Power," "Developing Political Strategies" 296 – 342; 343-389.

Tropman, J.E., H.R. Johnson & E.J. Tropman (1992); *Committee Management in Human Services: Running Effective Meetings, Committees and Boards* (Chicago, Illinois: Nelson-Hall Publishers), chapter 4 - "The Staff Person," 1-40.

McNutt, J.G. (2000). Coming perspectives in the development of electronic advocacy for social policy practice. *Critical Social Work* 1 (1). Available at <http://www.criticalsocialwork.com/units/socialwork/critical.nsf/982f0e5f06b5c9a285256d6e006cff78/52962a06cda7823785256ea6004d50d9?OpenDocument>

National Committee to Preserve Social Security and Medicare, "Guide to Effective Advocacy" (NCPSSM: Washington, DC). Will be handed out in class.

Work Group on Health Promotion and Community Development at the University of Kansas in Lawrence,

Kansas and AHEC/Community Partners in Amherst, Massachusetts, “Community Tool Box (CTB),” Please access and read the following selections from chapter 34, “Media Advocacy” – “Working with the Media” http://ctb.ku.edu/tools/en/sub_section_main_1269.htm ; “Creating Stories the Media Wants” http://ctb.ku.edu/tools/en/sub_section_main_1273.htm ; “Meeting the Media” http://ctb.ku.edu/tools/en/sub_section_main_1275.htm

If you have an interest in learning more about electronic advocacy skim “The Virtual Activist 2.0 A Training Course developed by Audrie Krause, Michael Stein, Judi Clark, Theresa Chen, Jasmine Li, Josh Dimon, Jennifer Kanouse, and Jill Herschman <http://www.netaction.org/training/index.html>

NOVEMBER 12: CLASS 12 - OPEN CLASS

Testimony or Case Statement or Options or Field-Related Memo *Due November 12*

- A. DISCUSSION WITH CLASS ABOUT PROJECT PAPERS, DESIGN AND ISSUES
- B. CONSULTATION AMONG AND BETWEEN INDIVIDUALS AS WELL AS PROFESSOR ON PROJECT REPORT ORGANIZATION AND ISSUES.

NOVEMBER 19: CLASS 13 - STUDENT PRESENTATIONS AND DISCUSSION

NO CLASS ON NOVEMBER 26 – Thanksgiving Break

DECEMBER 5: CLASS 13 - STUDENT PRESENTATIONS AND DISCUSSION

FIRST DRAFT OF ALL PAPERS DUE ONE WEEK BEFORE YOUR PRESENTATION--Students are responsible for duplicating and distributing copies of their first drafts to each member of the class and the instructor one week before your presentation.

PLEASE BRING A FEW COPIES OF YOUR SHORT MEMOS COMMENTING ON DRAFT OF EACH PROJECT REPORT (will distributed to professor and appropriate presenters)

Revised papers due December 13

DESCRIPTION OF ASSIGNMENTS

**Assignment 1 (5% of grade)
Due September 3
Letter to Your Future Self**

Write a letter to “your future self” about the values and goals that drive you as a professional. Begin by briefly discussing the values, commitments and experiences that brought you into social work and describe your vision of a more decent society. What expectations do you have for yourself as a change agent? **Now put yourself 20 years out into the future.** As you reflect upon your future self, what do you expect to see? How will you have sought to make a difference through your work and life? How important do you think values will be in terms of shaping your practice, and social, political and personal commitments? What will help you maintain your values and capacity to act upon them? What type of work do you expect to be doing, and how will it connect to your vision and professional goals?

One, single-spaced page is sufficient.

Assignment 2 (5% of grade)
DUE September 10, 2008
Analysis of Policy Advocacy by a Non-Profit Organization

The goal of this assignment is for the student to learn how non-profit organizations work to affect public policy and legislation.

Tasks

1. Select a non-profit organization that is engaged in policy practice. You may select an organization from the list below or another one that is of interest to you. Go to these organization's websites to learn what its main goals are and what information it has on the website about its policy advocacy activities.
2. Write a 2-4 page paper that reports on what you learned. Your paper should address the following:
 - Name of the agency and its principal mission or goal
 - What issues it has identified as targets of its policy advocacy activities
 - Summary of the kinds of information it provides about the policy issues
 - Description of its primary advocacy activities (what does it do to influence policy?)
 - Description of the information the website offers to encourage interested individuals to engaged in advocacy (e.g., is there are guide to how to talk to your Congressional representative, or other advocacy tools)
 - Your assessment of the effectiveness of the information provided (consider clarity of content, usefulness of guidance offered, general format of the advocacy parts of the agency's web pages)
 - Other observations or comments of your own

Please select from:

Alliance for Retired Americans <http://www.retiredamericans.org/>

AARP <http://www.aarp.org/>

Century Foundation <http://www.tcf.org/about.asp> (look at the materials that address the foundation's economic inequality and aging foci.)

Children's Defense Fund (strong voice for low-income children)

<http://www.childrensdefense.org/site/PageServer?gclid=CNH4t97bpZUCFQukHgod5jOnkQ>

Disability Rights Education and Defense Fund: <http://www.dredf.org> (focuses on disability rights issues)

Families Against Mandatory Minimums: <http://www.famm.org> (focuses on prison sentences, especially those aimed at drug violations)

National Council of LaRaza: <http://www.nclr.org> (focuses on issues of importance to the Hispanic community)

National Alliance on Mental Illness: <http://www.nami.org> (focuses on issues for individuals and families of individuals with mental illness)

Child Welfare League: <http://www.cwla.org> (focuses on issues services for child abuse and neglect)

Gay Men's Health Crisis: <http://www.gmhc.org> (focuses on issues involving HIV/AIDS)

National Association for the Advancement of Colored People (NAACP): <http://www.naacp.org> (focuses on issues of non-discrimination and other issues important to the welfare of African Americans in the U.S.)

New York Public Interest Research Group <http://www.nypirg.org/>

Paralyzed Veterans of America: <http://www.pva.org> (focuses on welfare of veterans with spinal cord injuries)

Peter G. Petersen Foundation <http://www.pgpf.org/> (focuses on raising public awareness about putative nature and urgency of U.S. economic problems and entitlement spending).

Focus on the Family: <http://www.family.org> (focuses on family issues from a Christian religious perspective—some of the advocacy materials are at the CitizenLink website, accessed through the main site)

Assignment 3 (10% of grade)
Due September 24
First Cut Problem Definition Exercise

You are staffing a committee of state and local representatives of human services agencies - including _____, _____, and _____. You have been asked by the chair of the committee to summarize information in a 2 page single-spaced memo to assist members in addressing the following questions:

- 1) What do the literature and expert opinion tell us about the issues that are most central to addressing the problem you are addressing?
- 2) How many people are we talking about in _____? What levels of care might they need? Where are they cared for now? How many caregivers are involved?
- 3) What is being done in other states to address this issue?
- 4) What are the major issues needing to be addressed by state and local service providers as they care for this population?

Please provide citations to literature, experts and data.

Identify and adapt this assignment to a topic of interest to you.

Assignment 4 (10% of grade)
Due October 8
Agency/community profile

Identify the census tracts that cover the service area of your field agency, work site or a community or neighborhood of your choosing. Develop a demographic, social and economic profile of this geographical entity. Utilize Census Bureau and GIS Mapping tools to create a profile.

Assignment 5 (10%)
Due October 15

One to 1½ page memo to newly-elected member of Congress about federal budget deficit

In an attempt to simulate a real world experience, you will receive an assignment at 5:00 pm October 22nd from a new member of Congress asking you to provide background information, pros and cons about how to position s/he might take and a recommended stance on an important budget issue. You may write this on your own or as 2-person team.

Assignment 6 (10%)
Due October 22
Talking points for a political candidate

Develop a 1-2 page set of talking points that briefs the candidate of your choice on a controversial subject s/he will be asked to address.

Assignment 7 (20 % of grade)

Due November 12

Testimony or Case Statement or Options or Field-Related Memo

Prepare one of the following written documents as per your learning needs: brief testimony with supportive data and literature (no more than 4 pages), a decision memo that identifies and assesses options for addressing a policy or programmatic problem (no more than three single-spaced pages each, plus graphs and tables as appropriate) or a case statement providing supportive argumentation and data for an advocacy position/effort. Alternatively, you may structure an assignment that develops information for your field or work setting. Below finds suggestions for how you might approach these assignments. (Further instruction will be provided at a later date.

Testimony: You have been asked to testify before the _____ on an important policy issue (or social problem or programmatic issue. (Briefly in a short paragraph that precedes your written testimony, set the stage for the testimony by noting a) the venue (Committee of the U.S. Senate, Committee of the New York Assembly, Commission on ...), b) the topic of the hearing, c) the role you will be play (e.g., advocate/lobbyist for a social welfare organization, advocate/lobbyist for a business-oriented organization, policy analyst for Children's Defense Fund, policy analyst for a non-partisan think tank, researcher for a government agency, etc.), d) what you hope to accomplish with your testimony (e.g., press coverage, persuading key members of the committee, providing information to assist with making a decision) and e) whether the audience you will be addressing is likely to be hostile, neutral, favorable or mixed in its response to the information you will provide and the recommendations you will make.)

Then develop testimony. (Please prepare testimony no longer than four single-spaced pages, plus supporting tables, charts, appendices and references. Present argumentation and supportive information that helps to structure the problem and achieve the goals you have set out for your testimony.

Case Statement: You are working for an advocacy organization, a state legislator or community group that is concerned about either a) bringing attention to and addressing an important social problem and/or b) advancing legislation or other policy changes. You have been asked to develop materials that identify the issue (including its scope and importance) and then develops arguments for advancing a particular legislative, regulatory, programmatic or other policy change along with one page of talking points.

Decision/Options Assessment Memo: At the request of the Task Force on _____, you have been researching an important policy issue/social problem for the last 8 weeks. We are very pleased with the work you have been doing on our behalf. Thank you. In two weeks time, our committee will meet to decide on a course of action. In advance of the meeting would you kindly prepare a memorandum which: 1) defines the problem; 2) identifies the major options; 3) briefly assesses these alternatives and 4) makes a recommendation.

Field-Related Memo: Structure your own assignment, focusing on a policy/administrative issue/problem of concern to your field placement agency. Be sure to apply some of the policy analysis concepts and tools discussed in this course. When describing the issue/problem be sure to use at least one "back of the envelope" calculation (see Patton & Sawicki, chapter 4) and, as appropriate, other quick research techniques to either : 1) delineate the scope of the social problem; 2) estimate the potential cost of responding to or not responding to the problem; or 3) provide other information useful to defining the problem. (Please see me if you wish to pursue this option.).

Assignment 8 (30% of grade)
SWK778 SEMESTER-LONG INDIVIDUAL OR 2-PERSON PROJECTS

Electronic draft to be sent to all students and professor five days prior to your presentation
Final draft due on or before December 13

(Note: Due earlier if your presentation falls before Thanksgiving)

Here are **guidelines** for the individual or 2-person projects. I am asking that you commit to one of three types of policy projects

- **A Policy Analysis/Research** project that examines an important policy/programmatic issue, assessing options and making recommendations
- **An Advocacy Strategy project** that develops a case statement and supportive materials to advance a significant policy proposal, or
- **A white paper** that addresses a problem or policy question of concern to a client (e.g., an agency, advocacy group, politician, for-profit human service provider or political jurisdiction),

The first complete draft of your report should be sent electronically at least five days prior to your presentation. Members of the class will be expected to read each report and provide written feedback to the author(s) (with an electronic copy sent to the professor). Each individual or 2-person team will then be expected to revise their report, taking into consideration the feedback given on the first draft.

Remember, these are “**guidelines.**” As you develop your project, you may want to organize materials in a different manner. Create an outline and products that work for the problem you are addressing and client you are serving.

POLICY ANALYSIS/RESEARCH PROJECT

Students who select this option are expected to participate in a semester-long policy analysis/research project. A policy analysis framework will be used to assess policy and/or programmatic options to address a problem/issue of concern to at-risk populations. The student(s) will be expected to apply a policy analysis model that a) draws on existing data, literature and other sources to carefully define a social problem/issue, b) identifies goals and evaluative criteria for assessing options c) identifies policy/programmatic options, both displaying and assessing these options in a structured manner, and d) develops a set of recommendations.

The products will include:

- a) an executive summary (one to one and one-half pages single spaced)
- b) a clearly written 12 - 20 page (double spaced) policy paper with graphs and tables, as appropriate
- c) technical appendices, as appropriate
- d) a short memo briefly discussing the audience(s) you are seeking to influence and of what how you would expect key actors to respond to your report.
- e) a press release announcing release of the report, major findings and recommendations
- f) A 10-15 minute presentation using Powerpoint,

ADVOCACY STRATEGY PROJECT

Students who select this option are expected to participate in the development of a semester-long project directed at developing an advocacy proposal and strategy. More specifically, each group will be expected to draw on existing data, literature and other sources to a) develop a rationale for addressing an important

problem/issue, b) develop a proposal, c) identify a strategy for advancing the proposal, and d) develop supportive materials (e.g., talking points, fact sheets).

The products will include:

- a) an executive summary (one to one and one-half pages)
- b) a clearly written 10-14 page (double spaced) advocacy that lays out the problem, the proposal, supportive rationale and strategy for achieving advocacy goals.
- c) fact sheets that can be used by interested parties to educate about the problem and advance your proposal
- d) talking points for people advocating your position
- e) three page memo which identifies key stakeholders, assesses the political and administrative feasibility of the options you identify and charts a strategy for the acceptance of the course of action you are advocating
- f) A 10-15 minute presentation using Powerpoint, questions to follow.

WHITE PAPER PROJECT

Students who select this option are expected to participate in the development of a semester-long project that produces a white paper addressing a problem or policy question of concern to a client. The client may be an agency, an advocacy group, a for-profit human services organization, a politician, or a governmental jurisdiction.

The white paper should

- state the problem from the point of view of the client, explaining the potential impact on the client;
- discuss how this problem is being viewed and addressed by other clients in similar circumstances by drawing on literature, personal interviews, data, studies of best practices and reports. This will probably require looking at how this issue is being addressed in other jurisdictions (e.g., cities, states, nations);
- explain how these approaches may be drawn upon to address the concerns of your client
- make a recommendation for your client. The recommendations may include identification of questions needing further study, and/or specific recommendations for action.

The products will include:

- a) an executive summary (one to one and one-half pages)
- b) a clearly written 10-15 page (double spaced) paper
- c) a short memo briefly discussing the audience(s) you are seeking to influence and of what how you would expect key actors to respond to your report.
- d) a 10-15 minute presentation using Powerpoint, questions to follow

Prepare one of the following written documents as per your learning needs: brief testimony with supportive data and literature (no more than 4 pages), a decision memo that identifies and assesses options for addressing a policy or programmatic problem (no more than three single-spaced pages each, plus graphs and tables as appropriate) or a case statement providing supportive argumentation and data for an advocacy position/effort. Alternatively, you may structure an assignment that develops information for your field or work setting. Below finds suggestions for how you might approach these assignments. (Further instruction will be provided at a later date.

Testimony: You have been asked to testify before the _____ on an important policy issue (or social problem or programmatic issue. (Briefly in a short paragraph that precedes your written testimony, set the stage for the testimony by noting a) the venue (Committee of the U.S. Senate, Committee of the New York Assembly, Commission on ...), b) the topic of the hearing, c) the role you will

be play (e.g., advocate/lobbyist for a social welfare organization, advocate/lobbyist for a business-oriented organization, policy analyst for Children's Defense Fund, policy analyst for a non-partisan think tank, researcher for a government agency, etc.), d) what you hope to accomplish with your testimony (e.g., press coverage, persuading key members of the committee, providing information to assist with making a decision) and e) whether the audience you will be addressing is likely to be hostile, neutral, favorable or mixed in its response to the information you will provide and the recommendations you will make.)

Then develop testimony. (Please prepare testimony no longer than four single-spaced pages, plus supporting tables, charts, appendices and references. Present argumentation and supportive information that helps to structure the problem and achieve the goals you have set out for your testimony.

Case Statement: You are working for an advocacy organization, a state legislator or community group that is concerned about either a) bringing attention to and addressing an important social problem and/or b) advancing legislation or other policy changes. You have been asked to develop materials that identify the issue (including its scope and importance) and then develops arguments for advancing a particular legislative, regulatory, programmatic or other policy change along with one page of talking points.

Decision/Options Assessment Memo: At the request of the Task Force on _____, you have been researching an important policy issue/social problem for the last 8 weeks. We are very pleased with the work you have been doing on our behalf. Thank you. In two weeks time, our committee will meet to decide on a course of action. In advance of the meeting would you kindly prepare a memorandum which: 1) defines the problem; 2) identifies the major options; 3) briefly assesses these alternatives and 4) makes a recommendation.

Field-Related Memo: Structure your own assignment, focusing on a policy/administrative issue/problem of concern to your field placement agency. Be sure to apply some of the policy analysis concepts and tools discussed in this course. When describing the issue/problem be sure to use at least one "back of the envelope" calculation (see Patton & Sawicki, chapter 4) and, as appropriate, other quick research techniques to either : 1) delineate the scope of the social problem; 2) estimate the potential cost of responding to or not responding to the problem; or 3) provide other information useful to defining the problem. (Please see me if you wish to pursue this option.).

August 25, 2008

TO: Students, SWK778 Policy Practice and Advocacy
FROM: Eric Kingson, Professor of Social Work
RE: Writing memos

I thought you might like some guidance about how to write and format a memo. So, here goes...

General advice on memo writing

The key to writing a good memo is to 1) know what you want to accomplish, 2) think about the type of communication that is likely to get the response you want from your reader, and 3) present your ideas in a clear, succinct and readable manner. When writing memos, consider the following:

- Know your audience and write the memo in a way that is acceptable to them;
- Be clear about what you want the memo to accomplish;
- Put your main ideas in the opening paragraph and restate them in a concluding paragraph
- Be concise – most memos should be kept to one single-spaced page;
- Make the memo easy to read – clear sentences, good grammar, no typos, good organization & logical presentation of ideas;
- Format the memo in an attractive manner – use sub-headings, bullets & space between paragraphs;
- Use graphs or tables when they provide clear support for a point you wish to make (You may wish to attach them as an appendix to the memo);
- When writing long memos, consider placing more technical information in an appendix;
- Have a colleague read a draft of your memo to provide feedback about tone, effectiveness, clarity, grammar and presentation of your ideas.

Advice for writing the action memos

One option in the seventh assignment is for you write an action memo identifying and assessing options for addressing a social problem, social welfare policy or programmatic issue that responds to the needs of a low income or otherwise vulnerable population. How to begin? Know your audience (that's me)? What will impress your audience? (logical presentation of ideas, use of a policy analysis framework as discussed in the course and your readings, application of evaluative criteria, clarity of analysis and presentation of your ideas, and citations to course and/or other readings. In terms of organization and format, consider organizing the memo in the following manner:

- **Introduction and Summary** - A short paragraph that states the problem/issue, explains how you are assessing the issue and briefly summarizes your major recommendation(s)
- **Problem Statement** - One or two paragraphs that explain why the problem/issue you are addressing is important and provides some reference to data and literature that helps describe the scope and importance of the problem.
- **Options for Addressing the Problem/Issue** - Briefly describe the options, including the baseline option of "doing nothing"
- **Assessment of Options** – Identify criteria and apply them to an assessment of each option
- **Recommendations** – Develop action recommendations that emerge from your analysis

Advice about writing case statement: Take a look at some of the advocacy positions that are available on line from the Children's Defense Fund, Generations United, AARP or others. You'll find that they are clearly written and that the position they develop is often backed up with data and references to relevant research or experts. Describe the problem/issue, your organization's views about why this is a serious problem, and the solution it is advocating. Use sub-headings. You might want to organize the statement as follows: a) **Brief summary of problem and proposed solution**, b) **Statement of the problem, why it is important, and who it impacts**, c) **Causes**, d) **Proposed solutions**.