Robert M. La Follette School of Public Affairs
UNIVERSITY OF WISCONSIN–MADISON

Public Affairs 974: Aging and Public Policy

Spring 2020

Professor: Lindsay Jacobs
E-mail: lpjacobs@lafollette.wisc.edu
Office Hours: T 11:00am–12:15pm, 309 La Follette

Class Hours and Location:
T 3:30–5:25pm, 6116 Social Sciences

Course Description

This seminar-style course focuses on public policy related to aging and older populations. We will study major social insurance programs as well as trends and policies related to a variety of topics, including health and work at older ages, living arrangements and intergenerational transfers, and the demography of aging. While the course will primarily cover current U.S. policies and trends, we will also discuss some historical aspects and compare to policies and conventions found elsewhere.

Learning Objectives

Through this course, students will demonstrate an understanding of public policies covering older-age populations and will have gained skills in analyzing these policies through knowledge of the social, demographic, economic, and political contexts against which policies are made. Critical thinking skills will be exhibited and strengthened throughout the course in a research paper and presentation, through regular written and oral discussion of class readings, and leading portions of class discussions.

Credit Hours

This is a **3-credit hour course**. The credit standard for this course is met by an expectation of a total of 135 hours of student engagement with the course learning activities. This will include—in addition to the scheduled course meeting time—readings, online topic responses, and the development and execution of a research project. For more information on University credit hour policy, please see here: https://kb.wisc.edu/vesta/page.php?id=24558.

Prerequisites

This course is open to all La Follette students and interested graduate or special students from elsewhere on campus. While there are no other formal requirements, students should be familiar with public policy formulation and analysis. Some knowledge of analytic and statistical techniques found throughout the readings will be useful.

Class Structure and Reading Materials

The class will meet on Tuesdays, typically opening with the instructor providing a summary of a selection of the week's readings, giving an overview of relevant policy, and introducing questions to spur discussion. Questions for discussion and comments are not only highly encouraged, but are essential to the course. All required reading will be available online through the course Canvas site or, in some cases, the UW Library. Required readings are tentative and will be finalized at least weeks two weeks prior to the relevant class. Please check Canvas for the most up-to-date reading list.

Course Canvas Site

I will post problem sets, lecture slides, and supplemental materials to the course Canvas website, among other things. The address is `https://canvas.wisc.edu/courses/188851`.

Assessments and Grading

The typical UW–Madison grading scale will be used. I reserve the right to curve the scale dependent on overall class scores at the end of the semester. Any curve will only ever make it easier to obtain a certain letter grade. The grade will count the assessments using the following proportions, with late assignments counting for at most half credit:

Evaluation will be based on performance in the following areas, with grades being based on an earned total out of 100 points.

- **10 points** **Attendance and Participation.**
  To receive full credit, students must attend class regularly and be active participants in class discussions.
- **20 points** **Topic Responses.**
  Before each class, beginning in Week 2, students will write a brief comment on that week's content. This can be either a response to one of the readings (less than 250 words), or a longer post on a closely related topic supplemented by another academic, policy, or news article (less than 500 words). This will be submitted through Canvas prior to class (by 3pm) to receive credit.
- **20 points** **Class Topic Lead.**
  For one class during the semester, each student will choose a week for which they would like to lead an informal 30-minute discussion. This could include, for example, presenting materials related to that week's topic and posing questions for the class.
- **10 points** **Policy Research Paper Proposal.**
  A research paper proposal of no more than two pages will be due before Spring Break. It

will be an opportunity for gathering sources, outlining goals for the finished product, and getting instructor feedback.

- **40 points** **Policy Research Paper & Presentation.**
  Throughout the semester, students will be guided in composing a policy-relevant research paper on an aging issue. The finished product should be 15–20 pages of analytical writing, which may be either empirically or qualitatively focused. The work will be presented to the class at the end of the semester.

Course and University Policies

Electronics in Class

As the class is largely discussion based, the use of laptops or tablets in class is discouraged.

Communication with Instructor

In addition to office hours, I will be available in the classroom before the class lectures. This would be a good time especially to discuss material, ask questions about class logistics, etc. so that I can share responses with the rest of the class during lecture. E-mail communication is best reserved for timely or highly person-specific matters that cannot be addressed otherwise.

Academic Integrity and Honesty

University statement: *By enrolling in this course, each student assumes the responsibilities of an active participant in UW-Madison's community of scholars in which everyone's academic work and behavior are held to the highest academic integrity standards. Academic misconduct compromises the integrity of the university. Cheating, fabrication, plagiarism, unauthorized collaboration, and helping others commit these acts are examples of academic misconduct, which can result in disciplinary action. This includes but is not limited to failure on the assignment/course, disciplinary probation, or suspension. Substantial or repeated cases of misconduct will be forwarded to the Office of Student Conduct & Community Standards for additional review.*

For more information, refer to https://conduct.students.wisc.edu/academic-integrity/.

Accommodations for Disabilities

McBurney Disability Resource Center statement: *The University of Wisconsin-Madison supports the right of all enrolled students to a full and equal educational opportunity. The Americans with Disabilities Act (ADA), Wisconsin State Statute (36.12), and UW-Madison policy (Faculty Document 1071) require that students with disabilities be reasonably accommodated in instruction and campus life. Reasonable accommodations for students with disabilities is a shared faculty and student responsibility. Students are expected to inform faculty [me] of their need for instructional accommodations by the end of the third week of the semester, or as soon as possible after a disability has been incurred or recognized. Faculty [I], will work either directly with the student [you] or in coordination with the McBurney Center to identify and provide reasonable instructional accommodations. Disability information, including instructional accommodations as part of a student's educational record, is confidential and protected under FERPA.*

Please find more information and resources at: http://mcburney.wisc.edu.

Schedule and Weekly Topics

Week 1, 01/20–01/24: *Introductions and overview of class, background material on aging policy.*

Week 2, 01/27–01/31: *The Demography and Political Economy of Aging.*

- David Bloom and Dara Lee Luca. "The Global Demography of Aging: Facts, Explanations, Future". In: *Handbook of the Economics of Population Aging*. Ed. by John Piggot and Alan Woodland. 2016. Chap. 1, pp. 3–56
- G. Casamatta and L. Batté. "The Political Economy of Population Aging". In: *Handbook of the Economics of Population Aging*. Ed. by John Piggot and Alan Woodland. 2016. Chap. 7, pp. 381–444
- David Cutler, Angus Deaton, and Adriana Lleras-Muney. "Determinants of Mortality". In: *Journal of Economic Perspectives* 20.3 (2006), pp. 97–120
- **(Optional)** Ronald D. Lee. "The Formal Demography of Population Aging, Transfers, and the Economic Life Cycle". In: *Demography of Aging*. Ed. by Linda G. Martin and Samuel H. Preston. 1994. Chap. 1, pp. 381–444

Week 3, 02/03–02/07: *Health at Older Ages.*

- Susann Rohwedder and Robert J. Willis. "Mental Retirement". In: *Journal of Economic Perspectives* 24.1 (2010), pp. 119–138
- James P. Smith. "Unraveling the SES-Health Connection". In: *IFS Working Papers* (2004)
- Robert F. Schoeni, Vicki A. Freedman, and Linda G. Martin. "Socioeconomic and Demographic Disparities in Trends in Old-Age Disability". In: *Health at Older Ages: The Causes and Consequences of Declining Disability Among the Elderly*. 2009. Chap. 3
- Gábor Kézdi and Robert J Willis. "Expectations, Aging and Cognitive Decline". In: *Discoveries in the Economics of Aging*. Ed. by David Wise. University of Chicago Press, 2014, pp. 305–337
- **(Optional)** Michael Keane and Susan Thorp. "Decision-making, Markets and Cognitive Decline". In: *Handbook of the Economics of Population Aging*. Ed. by John Piggott and Alan Woodland. 2016. Chap. 5
- **(Optional)** Suzanne G. Leveille, Christina C. Wee, and Lisa I. Iezzoni. "Are Baby Boomers Aging Better Than Their Predecessors? Trends in Overweight, Arthritis, and Mobility Difficulty". In: *Health at Older Ages: The Causes and Consequences of Declining Disability Among the Elderly*. Ed. by David M. Cutler and David A. Wise. 2009. Chap. 7, pp. 223–235

Week 4, 02/10–02/14: *Living Arrangements and Consumption at Older Ages.*

- Carol Aneshensel, Frederick Harig, and Richard G. Wight. "Aging, Neighborhoods, and the Built Environment". In: *Handbook of Aging and the Social Sciences*. Ed. by Linda K. George and Kenneth F. Ferraro. 2015. Chap. 15, pp. 315–335

- Frank D. Bean et al. "Geographic Concentration, Migration, and Population Redistribution Among the Elderly". In: *Demography of Aging*. Ed. by Linda G. Martin and Samuel H. Preston. 1994. Chap. 9, pp. 319–335
- Kali S. Thomas and Vincent Mor. "Providing More Home-Delivered Meals is One Way to Keep Older Adults with Low Care Needs Out of Nursing Homes". In: *Health Affairs* 32.10 (2013), pp. 1796–1802
- **(Optional)** John Ameriks, Andrew Caplin, and John Leahy. "Retirement Consumption: Insights from a Survey". In: *The Review of Economics and Statistics* 89.2 (2007), pp. 265–274
- **(Optional)** Beth J. Soldo and Vicki A. Freedman. "Care of the Elderly: Division of Labor Among the Family, Market, and State". In: *Demography of Aging*. Ed. by Linda G. Martin and Samuel H. Preston. 1994. Chap. 6, pp. 195–216

Week 5, 02/17–02/21: ***Medical Insurance and Medicare.***

- David Blumenthal, Karen Davis, and Stuart Guterman. "Medicare at 50: Origins and Evolution". In: *New England Journal of Medicine* 372.5 (2015), pp. 479–486
- Gerald F. Riley and James D. Lubitz. "Long-Term Trends in Medicare Payments in the Last Year of Life". In: *Health Services Research* 45.2 (2010), pp. 565–576
- **(Optional)** Jeffrey R. Brown and Amy Finkelstein. "Insuring Long-Term Care in the United States". In: *Journal of Economic Perspectives* 25.4 (2011), pp. 119–142
- **(Optional)** Hanming Fang. "Insurance Markets for the Elderly". In: *Handbook of the Economics of Population Aging*. Ed. by John Piggot and Alan Woodland. 2016. Chap. 5
- **(Optional)** Gopi Shah Goda, John B. Shoven, and Sita Nataraj Slavov. "Implicit Taxes on Work from Social Security and Medicare". In: *Tax Policy and the Economy* 25 (2011), pp. 69–88
- **(Optional)** David C. Grabowski. "Medicare and Medicaid: Conflicting Incentives for Long-Term Care". In: *Milbank Quarterly* 85.4 (2007), pp. 579–610

Week 6, 02/24–02/28: ***End-of-life Care and Family Caregivers Policy.***

- J.Jill Suitor, Megan Gilligan, and Karl Pillemer. "Stability, Change, and Complexity in Later-Life Families". In: *Handbook of Aging and the Social Sciences*. Ed. by John Piggot and Alan Woodland. 2015. Chap. 10, pp. 205–216
- Kerwin Kofi Charles and Purvi Sevak. "Can Family Caregiving Substitute for Nursing Home Care?" In: *Journal of Health Economics* 24.6 (2005), pp. 1174–1190
- TBD

Week 7, 03/02–03/06: ***Data.***

- James P. Smith and Isabella Dobrescu. "Population Aging Data Sets and their Analysis". In: *Handbook of the Economics of Population Aging*. Ed. by John Piggot and Alan Woodland. 2016. Chap. 18

Week 8, 03/09–03/13: ***Income Support and Planning for Retirement.***

- Robert L. Clark et al. "Planning for Retirement? The Importance of Time Preferences". In: *Journal of Labor Research* 40.2 (2019), pp. 127–150
- Annamaria Lusardi and Olivia Mitchell. "Baby Boomer Retirement Security: The Roles of Planning, Financial Literacy, and Housing Wealth". In: *Journal of Monetary Economics* 54.1 (2007), pp. 205–224
- **(Optional)** Timothy Smeeding and Joseph Marchand. "Poverty and Aging". In: *Handbook of the Economics of Population Aging*. Ed. by John Piggott and Alan Woodland. North-Holland, 2016. Chap. 15, pp. 905–950
- **(Optional)** Johannes Binswanger and Katherine G. Carma. "How Real People Make Long-Term Decisions: The Case of Retirement Preparation". In: *Journal of Economic Behavior& Organization* 81.1 (2012), pp. 39–60
- **(Optional)** J. Michael Collins and Carly Urban. "The Role of Information on Retirement Planning: Evidence from a Field Study". In: *Economic Inquiry* 54.4 (2016), pp. 1860–1872
- **(Optional)** James M. Poterba. "Retirement Security in an Aging Population". In: *American Economic Review* 104.5 (2014), pp. 1–30

Week 9, 03/16–03/20: No classes this week. Have a nice Spring Break!

Week 10, 03/23–03/27: ***Pension Systems and Social Security.***

- **(Skim)** Olivia Mitchell and John Piggott. "Economic Aspects of Occupational Pensions". In: *Handbook of the Economics of Population Aging*. Ed. by John Piggott and Alan Woodland. North-Holland, 2016. Chap. 9
- **(Skim)** Larry DeWitt. "The Development of Social Security in America". In: *Social Security Bulletin* 70.3 (2010)
- **(Optional)** Martin Feldstein and Jeffrey B. Liebman. "Social Security". In: *Handbook of Public Economics*. 2002. Chap. 32, pp. 2245–2324
- **(Optional)** Olivia Mitchell and John Piggott. "Workplace-Linked Pensions for an Aging Demographic". In: *Handbook of the Economics of Population Aging*. 2016. Chap. 14, pp. 865–904
- **(Optional)** Alessandro Cigno. "Conflict and Cooperation within the Family, and Between the State and the Family, in the Provision of Old-Age Security". In: *Handbook of the Economics of Population Aging*. 2016. Chap. 10
- **(Optional)** Axel Borsch-Supan, Klaus Härtl, and Duarte Nuno Leite. "Social Security and Public Insurance". In: *Handbook of the Economics of Population Aging*. 2016. Chap. 13

Week 11, 03/30–04/03: ***Disability and SSDI.***

- David Autor and Mark Duggan. "The Growth in the Social Security Disability Rolls: A Fiscal Crisis Unfolding". In: *Journal of Economic Perspectives* 20.3 (2006), pp. 71–96
- Jeffrey Liebman. "Understanding the Increase in Disability Insurance Benefit Receipt in the United States". In: *Journal of Economic Perspectives* 29.2 (2015), pp. 123–150

- **(Optional)** Bruce D. Meyer and Wallace K.C. Mok. "Disability, Earnings, Income, and Consumption". In: *NBER Working Paper* (2013)
- **(Covered previously)** Schoeni, Freedman, and Martin, "Socioeconomic and Demographic Disparities in Trends in Old-Age Disability"

Week 12, 04/06–04/10: ***Work at Older Ages.***

- Eleonora Patacchini and Gary V. Engelhardt. "Work, Retirement, and Social Networks at Older Ages". In: *CRR Working Paper* (2016)
- James M. Raymo et al. "Later-Life Employment Preferences and Outcomes: The Role of Midlife Work Experiences". In: *Research on Aging* 32.4 (2010), pp. 419–466
- **(Optional)** Sudipto Banerjee and David Blau. "Employment Trends by Age in the United States: Why Are Older Workers Different?" In: *Journal of Human Resources* 51.1 (2016), pp. 163–199
- **(Optional)** David M. Blau and Ryan M. Goodstein. "Can Social Security Explain Trends in Labor Force Participation of Older Men in the United States?" In: *Journal of Human Resources* 45.2 (2010), pp. 328–363
- **(Optional)** Kevin E. Cahill, Michael D. Giandrea, and Joseph F. Quinn. "To What Extent is Gradual Retirement a Product of Financial Necessity?" In: *Work, Aging and Retirement* 3.1 (2017), pp. 25–54
- **(Optional)** Kevin Cahill, Michael Giandrea, and Joseph F. Quinn. "Evolving Patterns of Work and Retirement". In: *Handbook of Aging and the Social Sciences*. 2015
- **(Optional)** David Neumark and Joanne Song. "Barriers to Later Retirement: Increases in the Full Retirement Age, Age Discrimination, and the Physical Challenges of Work". In: *Michigan Retirement Research Center Working Paper* (2012)
- **(Optional)** Kevin E. Cahill and Joseph F. Quinn. "A Balanced Look at Self-Employment Transitions Later in Life". In: *Public Policy & Aging Report* 24.4 (2014), pp. 134–140
- **(Optional)** Julie M. Zissimopoulos and Lynn A. Karoly. "Transitions to Self-employment at Older Ages: The Role of Wealth, Health, Health Insurance and Other Factors". In: *Labour Economics* 14.2 (2007), pp. 269–295

Week 13, 04/13–04/17: ***Intergenerational Transfers and Social Networks***

- Robert Corey Remle. "The Midlife Financial Squeeze: Intergenerational Transfers of Financial Resources Within Aging Families". In: *Handbook of Aging and the Social Sciences*. 2011. Chap. 11
- Sonia Salari. "Elder Mistreatment". In: *Handbook of Aging and the Social Sciences*. 2011. Chap. 25, pp. 415–430
- Soldo and Freedman, "Care of the Elderly: Division of Labor Among the Family, Market, and State"

Week 14, 04/20–04/24: ***Topic TBD, including current legislation***

Week 15, 04/27–05/01: ***Presentations***