

GESM 131g Seminar in Social Analysis: Public Policy for Aging Populations

Fall 2023 Tue, Thurs 12:30pm – 1:50pm

Course Location: RGL 209

Section: 35454R

Instructor: Emma Aguila, Ph.D.

Office: by appointment or during office hours using Zoom.

Zoom Meeting ID: 950 623 9410 and Passcode: 828554

Office Hours: Tuesdays 2.30-3.30pm and Thursdays 9-9.45am

Contact Info: eaguilav@usc.edu

Course Description

This course explores work, retirement, health, and public policies for middle-aged and older adults. The course is focused on older economically disadvantaged population. Students will also learn about the Life Course approach theory. Through lectures, discussions, policy briefs, a group policy paper, and research presentations, students will examine the situation of older economically disadvantaged population and will learn about current issues and debates in the policy arena.

Learning Objectives

Specifically, upon successful completion of this course, students will

- Understand the key concepts and literature about disparities in work, retirement pathways, and health for older adults
- Learn about main theories related to work and retirement including the Life Course Approach that helps understand disparities through working age and at older ages
- Learn about public policies for economically vulnerable middle-aged and older adults
- Understand basic quantitative and qualitative tools to write a policy brief and a policy paper

Course Notes

The course utilizes Blackboard (<http://blackboard.usc.edu>) for posting lecture slides, assignments, syllabus, and readings.

Technological Proficiency and Hardware/Software Required

Excel software is required for in-class data analysis and the policy final paper. It is required to bring a laptop with Excel installed to Excel Labs to be able to do Excel Lab Exercises.

If you do not have Excel, you can download it for free with your USC student account at the following link: <https://itservices.usc.edu/officestudents/>

Required Readings and Supplementary Materials

All required and additional class readings are available on the course Blackboard site.

The following texts are recommended for students interested in gaining additional background. Please note there is no requirement to purchase these books for this course.

- Moore, D. S., Notz, W. I., & Fligner, M. A. (2015). *Basic Practice of Statistics* (7th ed.). W. H. Freeman. https://books.google.com.mx/books?id=JOMQKI8zj_EC (5th Edition or 6th Edition is acceptable)

- National Academies of Sciences, E (NAS). (2022). *Understanding the Aging Workforce: Defining a Research Agenda*. Washington, DC: The National Academies Press. <https://doi.org/10.17226/26173>.
- Settersten, R. A., & Hendricks, J. (Eds.). (2003). *Invitation to the Life Course: Toward New Understandings of Later Life*. Routledge. <https://doi.org/10.4324/9781315224206>.
- There are also many free online resources for learning how to use Excel that you may find to be helpful. For example, Microsoft Office website <https://support.microsoft.com/en-us/office/excel-video-training-9bc05390-e94c-46af-a5b3-d7c22f6990bb>

Grades and assignment submission policy:

Students are expected to complete all assignments on time. Unless otherwise specified, assignments are due according to the stated in the Course Schedule below. Late assignments will incur a penalty of 10% if submitted late but still on the due date, 20% if submitted the following day, and 30% if submitted the day after that; after this point, the assignment will no longer be accepted.

Students will complete a final exam, along with policy briefs and an analysis policy group project. Overall scores for the course will be calculated from these components using the weights specified below, with the caveat that I reserve the right to assign a non-passing grade on the basis of extremely poor assignments performances even if a student receives high scores on the group project and other assignments completed outside of class with the potential assistance of other students.

Category	% of Grade
Policy Papers	30
Analysis Policy Project	40
Midterm Exam	10
Final Exam	15
In-class Participation	5
TOTAL	100

GRADING SCALE

Course final grades will be determined using the following scale

95-100	A	73-76	C
90-94	A-	70-72	C-
87-89	B+	67-69	D+
83-86	B	63-66	D
80-82	B-	60-62	D-
77-79	C+	< 60	F

Assignments

Evaluation for the course will be based on the following components.

Policy Papers (30%)

Students will submit two essays (15% each) throughout the semester to enable a more in-depth discussion of a policy topic for that week. Essays will be 6-8 pages and will cover readings and materials of the designated weeks. Students should be prepared to share key points from their write-ups in class for our larger group discussion.

Final Policy Project (40%)

Throughout the semester, students will work together as a team (in groups of 3-4) on a policy paper. Students will apply lessons learned from topics covered each week in class. Grades for the team project will be determined as follows.

Proposal (5%). Each team will turn in a proposal outlining their chosen project and detailing their topic, a preliminary list of references, and a research plan for the remainder of the semester. Proposals will be 1-2 pages.

Data and Preliminary Descriptive Analysis (5%). In this assignment, each team will describe in more detail the dataset and variables that you will use. You will also show descriptive analysis of the variables and this deliverable will be 1-8 pages.

First Draft of Final Policy Paper (5%). Students will submit a first draft of the final policy project with a maximum of 15 pages (not including the references and executive summary).

Final Presentation (10%). Students will present as a team on the key findings of their case study project. The presentations will be judged on their accuracy, comprehensiveness, and creativity.

Final Policy Report (15%). Students will submit a team final policy report summarizing the key findings of the project. Reports will be 10-15 pages.

Evaluation of your own contribution and others in the Group: Each student must complete a peer evaluation in which you assess the contributions of your group members. These evaluations are completely confidential and will never be shown to your group members. Please respond honestly, and do not discuss these evaluations with anyone else (either before or after you complete them). These peer evaluations are important to give me a better sense of how groups worked, and to provide an opportunity for you to bring to my attention any issues that arose over the course of this project (you are also encouraged to come and speak with me throughout the course regarding any serious issues that arise and cannot be resolved internally). In particular, I will give serious consideration to comments indicating that a student did not contribute satisfactorily to the group (did not do a fair share of the work, was uncooperative, did not meet agreed-upon deadlines, etc.) when assigning individual grades for the project, as well as positive comments noting particularly outstanding contributions. The evaluation forms must be submitted the same day as the final policy paper.

Format Written Final Policy Report:

Your written report should be modeled after a client-focused report such as a GAO report (www.gao.gov) or other examples posted on Blackboard from White papers. It must include the following sections (in the order given here):

- A one-page executive summary (e.g., GAO Highlights <https://www.gao.gov/>). The summary should review the policy question motivating the analysis and the major findings.
- A background section that describes the motivation and relevance of the study, including information

on your intended audience/client, the problem you are addressing, and the context.

- A review of the relevant research.
- Describe the Data that you will be using in your analysis.
- Analyze as opposed to only presenting the data. Show how you arrived at the findings or recommendations
- A conclusion section that develops the implications of your analysis for the problem or policy you are addressing. Provide specific policy recommendations or solutions to specific problems.
- A references section that identifies the sources of all material cited in your paper.

Midterm Exam (10%)

The final exam will be an essay in response to a question/prompt. It will seek to assess student's comprehension of the core topics covered throughout the semester.

Final Exam (15%)

The final exam will be an essay in response to a question/prompt. It will seek to assess student's comprehension of the core topics covered throughout the semester. The final exam is scheduled to be on the final week.

In-Class Participation (5%)

Active participation is a critical component of this course. Students are expected to attend each class session and be an active member in class discussions and presentations. Students should complete all assignments and readings for a given session before class begins so as to allow for an informed discussion of the material. Participation scores will be based on participation in classroom discussions.

Course Schedule: A Weekly Breakdown

The following describes the topics to be covered at each course session. Note the syllabus is subject to change as deemed necessary by the instructor throughout the semester. Students will be notified of any changes through email and the course Blackboard site.

Date	Topics/Daily Activities	Readings from textbook	Deliverable/ Due Dates
Module 1: Aging Workforce			
Week 1-Tue 8/22/2023	<i>No class</i>		
Week 1-Thurs 8/24/2023	<i>No class</i>		
Week 2- Tue 8/29/2023	Course Introduction and Overview of the Emerging Older Workforce	NAS. Chapter 2.	
Week 2- Thu 8/31/2023	Overview of the Emerging Older Workforce Continued Work and Retirement Pathways	NAS. Chapter 2. Definitions: Race/Ethnic origin (Census bureau) NAS. Chapter 3. Definitions: Full-time/part-time work; Salaried/self-employed.	
Week 3- Tue 9/5/2023	Work and Retirement Pathways Continued The Labor Market of Older Workers	NAS. Chapter 3. NAS. Chapter 7.	
Week 3- Thu 9/7/2023	The Labor Market of Older Workers	McKinsey Global Institute (2019), pp 1-113. Gig Economy; Informal sector.	
Module 2: Basic Tools for Policy Analysis			
Week 4- Tue 9/12/2023	Writing a Policy Brief	Learn how to write a policy brief.	
Week 4- Thu 9/14/23	Writing a Policy Brief	Learn how to write a policy brief.	
Week 5- Tue 9/19/2023	Basic Descriptive Statistics for Policy Analysis	Moore, Notz, and Fligner (2015) Chapter 0, 1, 2, pp. 3-93	Analysis Project Description Due TODAY
Week 5- Thu 9/21/2023	Basic Descriptive Statistics for Policy Analysis	Moore, Notz, and Fligner (2015) Chapter 0, 1, 2, pp. 3-93	
Week 6- Tue 9/26/2023	Survey Sampling, Cross-sectional vs Longitudinal data, Observational Data vs Experiments	Moore, Notz, and Fligner (2015) Chapters 8, 9 pp. 201-259.	
Week 6- Thu 9/28/2023	Survey Sampling, Cross-sectional vs Longitudinal data, Observational Data vs Experiments	Moore, Notz, and Fligner (2015) Chapters 8, 9 pp. 201-259.	Policy Brief 1 Due TODAY
Week 7- Tue			

10/3/2023	Review Class Midterm Exam		
Week 7- Thu 10/5/2023	Two-way tables and Data Visualization for Policy Analysis	Moore, Notz, and Fligner (2015) Chapter 1, 6 pp.3-38; 161-176. Data Visualization	
Week 8- Tue 10/10/2023	Midterm Exam		
Module 3: The Life Course Approach, Aging, Work, and Retirement			
Week 8- Thu 10/12/2023	Fall Recess (no class)		
Week 9- Tue 10/17/2023	The Life Course Perspective on Aging, Work, and Retirement; In-class Project Work	Settersten and Hendricks (2003) Chapter 2, pp.49-84 and Chapter 3, pp. 85-106.	
Week 9- Thu 10/19/2023	The Life Course Perspective on Aging, Work, and Retirement	Mortimer and Shanahan (2003). pp 3-19; 269-291; 331-364;623-643. NAS. Chapter 3, pp 3.8-3.9.	
Week 10- Tue 10/24/2023	Individual, Health, and Social Factors that Influence Retirement Transitions	NAS. Chapter 4, pp 4.1-4.26	
Week 10- Thu 10/26/2023	Individual, Health, and Social Factors that Influence Retirement Transitions In-class Project Work	NAS. Chapter 4, pp 4.1-4.26	Analysis Project Background, Literature Review, and Analysis Sections Due TODAY
Module 4: Determinants and Pathways of Retirement			
Week 11- Tue 10/31/2023	Evidence of Retirement Pathways and Planning: focus on African Americans and Hispanics	NAS. Chapter 4, pp 4.1-4.26 Aguila and Lee. (2023). Flippen and Tienda (2000).	
Week 11- Thu 11/2/2023	Evidence of Retirement Pathways and Planning: focus on African Americans and Hispanics	Blanco et al. (2017) Aguila, Lee, and Wong. (2021) Lee, Aguila, and Wong. (2023)	
Week 12- Tue 11/7/2023	U.S. Public Policies for Older Adults	NAS. Chapter 8, pp 8.1-8.40. Barnes et al. (2021). pp 1-60.	Policy Brief 2 due TODAY
Week 12- Thu 11/9/2023	U.S. Public Policies for Older Adults	NAS. Chapter 8, pp 8.1-8.40.	

		Barnes et al. (2021). pp 1-60.	
Module 5: Public Policies for Older Adults			
Week 13- Tue 11/14/2023	In-class Project Work		Submit first complete draft of final project DUE TODAY
Week 13- Thu 11/16/2023	Older Immigrants and Public Policies	Aguila and Angel. (2021). Bacong and Đoàn (2022). Trinh and Gelila (2021).	
Week 14- Tue 11/21/2023	Thanksgiving Break (no class)		
Week 14- Thu 11/23/2023	Thanksgiving Break (no class)		
Week 15- Tue 11/28/2023	Student presentations		Presentation slides for groups presenting
Week 15- Thu 11/30/2023	Student presentations, final thoughts and course review class		Presentation slides for groups presenting this week
Week 16- Tue 12/12/2023	Final Examination	11:00am -1:00pm	

Readings by Topic: (more supplemental readings may be added throughout the semester)

Week	Readings
Module 1: Aging Workforce	
Week 2	<p>NAS. <i>Understanding the Aging Workforce: Defining a Research Agenda</i>. Chapter 2: The Emerging Older Workforce, pp 2.1 -2.47.</p> <p>Race/Ethnic origin Census bureau definition: https://www.census.gov/topics/population/race/about.html https://www.cosb.us/home/showpublisheddocument/5935/637356700118370000</p> <p>History about race/ethnic origin Census bureau definition: https://www.pewresearch.org/social-trends/2015/06/11/chapter-1-race-and-multiracial-americans-in-the-u-s-census/</p> <p>NAS. <i>Understanding the Aging Workforce: Defining a Research Agenda</i>. Chapter 3: Work and Retirement Pathways, pp 3.1-3.22</p> <p>Full-time/part-time work definitions. Bureau of Labor Statistics: https://www.bls.gov/cps/definitions.htm</p> <p>Salaried/self-employed definitions. definitions. Bureau of Labor Statistics: https://www.bls.gov/cps/definitions.htm https://www.bls.gov/bls/glossary.htm#U</p>
Week 3	<p>NAS. <i>Understanding the Aging Workforce: Defining a Research Agenda</i>. Chapter 7, pp. 7.1-7.20</p> <p>Lund S., Manyika J., Segel L.H., Dua A., Hancock B., Rutherford S., and Macon B. (2019). <i>The Future of Work in America: People and Places Today and Tomorrow</i>. Report by McKinsey Global Institute, McKinsey and Company, pp 1-113. Available: https://www.mckinsey.com/featured-insights/future-of-work/the-future-of-work-in-america-people-and-places-today-and-tomorrow.</p> <p>Gig Economy: https://www.bls.gov/careeroutlook/2016/article/what-is-the-gig-economy.htm https://lehd.ces.census.gov/doc/webinar/2019-08-21 - What May Be Driving Growth In The Gig Economy.pdf</p> <p>Informal sector: https://www.urban.org/sites/default/files/publication/32791/412372-informal-and-nonstandard-employment-in-the-united-states.pdf</p>
Module 2: Basic Tools for Policy Analysis	
Week 4	<p>Learn how to write a policy brief: https://www.fao.org/3/i2195e/i2195e03.pdf https://writingcenter.unc.edu/tips-and-tools/policy-briefs/ https://policyscotland.gla.ac.uk/wp-content/uploads/2021/04/TSRFWritingaPolicyBrief.pdf</p>
Week 5	<p>Moore, Notz, and Fligner Chapter 0, 1, 2, pp. 3-93 https://www.journalofaccountancy.com/newsletters/extra-credit/how-to-see-descriptive-statistics-in-excel.html</p>

Week 6	Moore, Notz, and Fligner Chapters 8, 9 pp. 201-259. GAO Reports (observational studies): https://www.gao.gov/ 3ie (experimental studies): https://www.3ieimpact.org/
Week 7	Moore, Notz, and Fligner Chapter 1, 6 pp.3-38; 161-176. Data Visualization using Excel: https://www.tutorialspoint.com/excel_data_analysis/excel_data_analysis_visualization.htm
Module 3: The Life Course Approach, Aging, Work, and Retirement	
Week 8	Midterm Exam
Week 9	Settersten and Hendricks Chapter 2, pp.49-84 and Chapter 3, pp. 85-106. https://www.helpage.org/what-we-do/life-course-approach-to-ageing/ NAS. <i>Understanding the Aging Workforce: Defining a Research Agenda</i> . Chapter 3: Work and Retirement Pathways, pp 3.8-3.9 Mortimer J. T., and Shanahan M. J. (Eds.). (2003). <i>Handbook of the life course</i> (1st ed.). Springer New York, NY. pp 3-19; 269-291; 331-364;623-643. https://doi.org/10.1007/b100507 .
Week 10	NAS. <i>Understanding the Aging Workforce: Defining a Research Agenda</i> . Chapter 4, pp 4.1-4.26
Module 4: Determinants and Pathways of Retirement	
Week 11	NAS. <i>Understanding the Aging Workforce: Defining a Research Agenda</i> . Chapter 4, pp 4.1-4.26 Aguila Emma and Zeewan Lee. Work and Retirement of Older Black and Hispanic Adults. (2023). <i>Mimeo</i> . USC, pp 1-55. Aguila Emma, Zeewan Lee, and Rebeca Wong. (2021). Migration, work, and retirement: The case of Mexican-origin populations. <i>Journal of Pension Economics and Finance</i> , 1-21. https://doi.org/10.1017/S1474747221000342 Flippen C, and Tienda M. (2000). Pathways to retirement: Patterns of labor force participation and labor market exit among the pre-retirement population by race, Hispanic origin, and sex. <i>J Gerontol Soc Sci</i> ; 55: 14–27. Blanco Luisa, Aguila Emma, Gongora Arturo, and Duru O. Kenrik. (2017). “Retirement Planning Among Hispanics: In God’s Hands?” <i>Journal of Aging & Social Policy</i> , 29(4), 311–331. Zeewan Lee, Aguila Emma, and Rebeca Wong. (2023). Determinants of Retirement of Formal and Informal Sector Workers in Mexico: the role of health and economic security. <i>Journal Salud Pública de México Special Issue of the 7th Annual Seminar/Workshop MHAS-ENASEM 2022</i>
Module 5: Public Policies for Older Adults	
Week 12	NAS. <i>Understanding the Aging Workforce: Defining a Research Agenda</i> . Chapter 8, pp 8.1-8.40. Barnes Mitchel, Bauer Lauren, Edelberg Wendy, Estep Sara, Greenstein Robert, and Macklin Moriah. (2021). The social insurance system in the US: Policies to protect workers and

	families. Brookings, pp 1-60. https://www.brookings.edu/research/the-social-insurance-system-in-the-u-s-policies-to-protect-workers-and-families/
Week 13	<p>Aguila Emma and Jacqueline L. Angel. (2021).” Retirement and Supplemental Income Programs for Low-Income Older Mexican-Origin Adults in the United States and Mexico.” <i>Public Policy & Aging Report</i>, prab10, pp 89-95. https://doi.org/10.1093/ppar/prab010</p> <p>Bacong A. M., and Đoàn L. N. (2022). Immigration and the Life Course: Contextualizing and Understanding Healthcare Access and Health of Older Adult Immigrants. <i>Journal of Aging and Health</i>, pp 1-16. https://doi.org/10.1177/08982643221104931.</p> <p>Trinh P., and Gelila S. (2021). The Diversity of Older Immigrants and Precarious Aging: Eligibility and Access to Public Benefits. <i>Generations</i>. https://generations.asaging.org/older-immigrants-and-precarious-aging-benefits</p>

COURSE POLICIES

Health and Safety Requirements

All students are required to comply with and stay up to date on all university safety and health guidelines (<https://coronavirus.usc.edu/>).

Communication

In addition to office hours, email is my preferred form of communication. When emailing me, try to include the name of the course in the subject line of your email to ensure that it does not get lost in my inbox. I will do my best to reply to emails within 24-48 hours, **Mondays through Fridays, when class is in session at the university. If you email me on a weekend or holiday, please anticipate that I may not answer back within the time period.**

Deadlines

Students who miss deadlines due to valid, extenuating circumstances may submit the required work at an agreed-upon date. Incomplete projects will be evaluated in relation to their degree of completion.

Creating an Inclusive Classroom Community

We are all responsible for ensuring that this class is a supportive environment for everyone. No space is automatically safe for people because of our different backgrounds and knowledge. We must not just be aware of this but also be sensitive to how this will shape our class environment throughout the semester. I expect that all students will contribute to creating a safe space for everyone during our class lectures. As the instructor, I will work to support discussions that are respectful and engage critically with our course material. I will NOT support discussions that are deemed disrespectful and purposefully tangential to the material and will immediately shut down any inappropriate discussions.

Preferred Pronouns and Names

If you would like to be referred to by a name and/or pronoun that is different than how you are identified in the official roster, please let me know. I will do my best to ensure that your fellow classmates and I address you as preferred.

STATEMENT ON ACADEMIC CONDUCT AND SUPPORT SYSTEMS

Academic Conduct

Please familiarize yourself with the discussion of academic conduct in *SCampus* in Part B, Section 11, "Behavior Violating University Standards" policy.usc.edu/scampus-part-b. For more information, see additional information in *SCampus* and university policies on scientific misconduct, <http://policy.usc.edu/scientific-misconduct>.

Academic Integrity

USC seeks to maintain an optimal learning environment. General principles of academic honesty include the concept of respect for the intellectual property of others, the expectation that individual work will be submitted unless otherwise allowed by an instructor, and the obligations both to protect one's own academic work from misuse by others as well as to avoid using another's work as one's own. All students are expected to understand and abide by these principles. *SCampus*, the Student Guidebook, contains the University Student Conduct Code (see University Governance, Section 11.00), while the recommended sanctions are located in Appendix A.

Academic Accommodations

Any student requesting academic accommodations based on a disability is required to register with Disability Services and Programs (DSP) each semester. A letter of verification for approved accommodations can be obtained from DSP. Please be sure the letter is delivered to me (or to TA) as early in the semester as possible. DSP is located in GFS 120 and is open 8:30 a.m.–5:00 p.m., Monday through Friday. Website

for **DSP** (<https://dsp.usc.edu/>) and contact information: (213) 740-0776 (Phone), (213) 740-6948 (TDD only), (213) 740-8216 (FAX) dspfrontdesk@usc.edu.

Emergency Preparedness/Course Continuity in a Crisis

In case of a declared emergency, if travel to campus is not feasible, USC executive leadership will announce an electronic way for instructors to teach students in their residence halls or homes using a combination of Blackboard, teleconferencing, and other technologies. See the university's site on **Campus Safety and Emergency Preparedness**.

Support Systems:

Student Counseling Services (SCS) – (213) 740-7711 – 24/7 on call

Free and confidential mental health treatment for students, including short-term psychotherapy, group counseling, stress fitness workshops, and crisis intervention. engemannshc.usc.edu/counseling

National Suicide Prevention Lifeline – 1 (800) 273-8255

Provides free and confidential emotional support to people in suicidal crisis or emotional distress 24 hours a day, 7 days a week. www.suicidepreventionlifeline.org

Relationship and Sexual Violence Prevention Services (RSVP) – (213) 740-4900 – 24/7 on call

Free and confidential therapy services, workshops, and training for situations related to gender-based harm. engemannshc.usc.edu/rsvp

Sexual Assault Resource Center

For more information about how to get help or help a survivor, rights, reporting options, and additional resources, visit the website: sarc.usc.edu

Office of Equity and Diversity (OED)/Title IX Compliance – (213) 740-5086

Works with faculty, staff, visitors, applicants, and students around issues of protected class. equity.usc.edu

Bias Assessment Response and Support

Incidents of bias, hate crimes and microaggressions need to be reported allowing for appropriate investigation and response. studentaffairs.usc.edu/bias-assessment-response-support

The Office of Disability Services and Programs

Provides certification for students with disabilities and helps arrange relevant accommodations. dsp.usc.edu

Student Support and Advocacy – (213) 821-4710

Assists students and families in resolving complex issues adversely affecting their success as a student EX: personal, financial, and academic. studentaffairs.usc.edu/ssa

Diversity at USC

Information on events, programs and training, the Diversity Task Force (including representatives for each school), chronology, participation, and various resources for students. diversity.usc.edu

USC Emergency Information

Provides safety and other updates, including ways in which instruction will be continued if an officially declared emergency makes travel to campus infeasible. emergency.usc.edu

USC Department of Public Safety/UPC: (213) 740-4321 – HSC: (323) 442-1000 – 24-hour emergency or to report a crime.

Provides overall safety to the USC community. dps.usc.edu