# Syllabus

HPM 790: Advanced Health Policy Analysis and Advocacy  
Spring 2019  
4:40-7:40 pm, Room 2308 McGavran Greenberg  
3 Credits | [Residential]

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Course Overview

- **Course Description**: This class will provide students with a hands-on opportunity to learn about the health policy development process in the United States. Students will gain an understanding of the different ways in which health policy are made through the legislative, executive, and judicial branches of government, as well as the role of the media and advocates/stakeholder groups in shaping health policy. Students will also gain practical experience designing and implementing a campaign aimed at changing health policy. Specifically, students will be assigned a topic and a stakeholder, and will learn how to: 1) define their problem, 2) analyze different policy options, 3) conduct a stakeholder analysis, 4) develop an advocacy strategy, 5) prepare a legislative fact sheet using strategies of clear communication, and 6) make a legislative presentation.

- **Prerequisites**: None. Open to graduate students. Undergraduates (seniors) can register with instructor permission.

- **Instructor(s)**: Pam Silberman, JD, DrPH
  Professor
  Department of Health Policy and Management
  1102 A McGavran Greenberg
  Phone: 919-966-4525
  Email: pam_silberman@unc.edu

- **Teaching Assistant**: Hill Winstead
  wwinstea@live.unc.edu

- **Course Website**: [https://sakai.unc.edu/welcome/](https://sakai.unc.edu/welcome/). Use your ONYEN and password.

- **Class Days, Times, Location**: Mondays 4:40-7:40
  MHRC 003.

- **Office Hours**: There are no set office hours for this course. Students may request an appointment by email.


  Other Readings are noted in the Course Schedule.
Useful website (These are great sources to check for evidence about the problem and/or potential policy options):

- The Henry J. Kaiser Family Foundation ([www.kff.org](http://www.kff.org))
- The Congressional Budget Office ([www.cbo.gov](http://www.cbo.gov))
- The Centers for Disease Control and Prevention ([www.cdc.gov](http://www.cdc.gov))
- The National Center for Health Statistics ([www.cdc.gov/nchs/](http://www.cdc.gov/nchs/))
- The Commonwealth Fund ([www.cmwf.org](http://www.cmwf.org))
- National Conference of State Legislatures ([www.ncsl.org](http://www.ncsl.org))
- National Academy of State Health Policy ([www.nashp.org](http://www.nashp.org))
- National Governors Association ([http://www.nga.org/cms/home.html](http://www.nga.org/cms/home.html)), see especially the NGA Center for Best Practices, Health Division ([http://www.nga.org/cms/center/health](http://www.nga.org/cms/center/health))
- Washington State Institute for Public Policy ([http://www.wsipp.wa.gov/](http://www.wsipp.wa.gov/)) (Look at the cost benefit results and reports section. This could be useful for many of your projects—if US focused).

Review of these websites is not required unless specified. These URLs are provided as a service.

- **Course Format**
  The course format includes lectures, guest lectures, class discussion, and presentations. Students are expected to complete the readings and review the slides before class and come to each class prepared to discuss the materials covered in the slides (with the exception of Class 1).
Course Policies

- Recognizing, Valuing and Encouraging Inclusion and Diversity in the Classroom

We share the School’s commitment to diversity. We are committed to ensuring that the School is a diverse, inclusive, civil and welcoming community. Diversity and inclusion are central to our mission — to improve public health, promote individual well-being and eliminate health inequities across North Carolina and around the world. Diversity and inclusion are assets that contribute to our strength, excellence and individual and institutional success. We welcome, value and learn from individual differences and perspectives. These include but are not limited to: cultural and racial/ethnic background; country of origin; gender; age; socioeconomic status; physical and learning abilities; physical appearance; religion; political perspective; sexual identity and veteran status. Diversity, inclusiveness and civility are core values we hold, as well as characteristics of the School that we intend to strengthen.

We are committed to expanding diversity and inclusiveness across the School—among faculty, staff, students, on advisory groups, and in our curricula, leadership, policies and practices. We measure diversity and inclusion not only in numbers, but also by the extent to which students, alumni, faculty and staff members perceive the School’s environment as welcoming, valuing all individuals and supporting their development.

In this class, we practice these commitments in the following ways:

- Develop classroom participation approaches that acknowledge the diversity of ways of contributing in the classroom and foster participation and engagement of all students.
- Structure assessment approaches that acknowledge different methods for acquiring knowledge and demonstrating proficiency.
- Encourage and solicit feedback from students to continually improve inclusive practices.

As a student in the class, you are also expected to understand and uphold the following UNC policies:

- Diversity and Inclusion at the Gillings School of Global Public Health: http://sph.unc.edu/resource-pages/diversity/
- Prohibited Discrimination, Harassment, and Related Misconduct at UNC: https://deanofstudents.unc.edu/incident-reporting/prohibited-harassmentsexual-misconduct

- Accessibility

UNC-CH supports all reasonable accommodations, including resources and services, for students with disabilities, chronic medical conditions, a temporary disability, or a pregnancy complication resulting in difficulties with accessing learning opportunities.
All accommodations are coordinated through the UNC Office of Accessibility Resources & Services (ARS), [https://ars.unc.edu/](https://ars.unc.edu/); phone 919-962-8300; email ars@unc.edu. Students must document/register their need for accommodations with ARS before accommodations can be implemented.

**UNC Honor Code**

As a student at UNC-Chapel Hill, you are bound by the university’s Honor Code, through which UNC maintains standards of academic excellence and community values. It is your responsibility to learn about and abide by the code. All written assignments or presentations (including team projects) should be completed in a manner that demonstrates academic integrity and excellence. Work should be completed in your own words, but your ideas should be supported with well-cited evidence and theory. To ensure effective functioning of the Honor System at UNC, students are expected to:

a. Conduct all academic work within the letter and spirit of the Honor Code, which prohibits the giving or receiving of unauthorized aid in all academic processes.

b. Learn the recognized techniques of proper attribution of sources used in written work; and to identify allowable resource materials or aids to be used during completion of any graded work. You should review the UNC writing center handout on plagiarism (with link below).

c. Sign a pledge on all graded academic work certifying that no unauthorized assistance has been received or given in the completion of the work.

d. Report any instance in which reasonable grounds exist to believe that a fellow student has violated the Honor Code.

Instructors are required to report suspected violations of the Honor Code, including inappropriate collaborative work or problematic use of secondary materials, to the Honor Court. Honor Court sanctions can include receiving a zero for the assignment, failing the course and/or suspension from the university. If you have any questions about your rights and responsibilities, please consult the Office of Student Conduct at [https://studentconduct.unc.edu/](https://studentconduct.unc.edu/), or consult these other resources:

- Honor system module.
- UNC library’s plagiarism tutorial.
- UNC Writing Center handout on plagiarism.

**Instructor Expectations**

You are expected to be online and participate in all classes. If, in an unusual circumstance, you cannot be online, you must notify the faculty member in advance of the class. You are still responsible for completing and turning in all class assignments in a timely fashion.

**Email**

The instructor will typically respond to email within 1-2 days or less if sent Monday through Friday. The instructor may respond to weekend emails, but it is
not required of them. If you receive an out of office reply when emailing, it may take longer to receive a reply. The instructor will provide advance notice, if possible, when they will be out of the office. If you do not receive a timely email response, please send another email reminder.

**Discussion Board**
Not applicable.

**Feedback**
All graded assignments will receive written feedback that coincides with the assessment rubric. Feedback is meant to be constructive and help the student continue to build upon their skills. Feedback is a tool that you as a learner can use to understand the areas that you are succeeding in and what you can do to improve in other areas.

**Grading**
Every effort will be to provide grades and feedback within two weeks after the due date. Assignments that build towards a future assignment will be graded and returned with at least one week in which you can use the information for your later assignment.

**Syllabus Changes**
The instructor reserves the right to make changes to the syllabus, including project due dates and test dates. These changes will be announced as early as possible.

**Telephone Messages**
The instructor will attempt to respond to telephone messages within 1-2 days Monday through Thursday. Calls left on a Friday will be returned that day if possible; if not, they will be returned on Monday. Generally, emails are a better way to reach the instructor.

- **Student Expectations**

  **Appropriate Use of Course Resources:** The materials used in this class, including, but not limited to, syllabus, exams, quizzes, and assignments are copyright protected works. Any unauthorized copying of the class materials is a violation of federal law and may result in disciplinary actions being taken against the student. Additionally, the sharing of class materials without the specific, express approval of the instructor may be a violation of the University’s Student Honor Code and an act of academic dishonesty, which could result in further disciplinary action. This includes, among other things, uploading class materials to websites for the purpose of sharing those materials with other current or future students.

  **Assignments**
Submit all assignments through Sakai, unless instructed otherwise. Emailing assignments is not preferable unless prior arrangements have been made. If you are having issues submitting assignments, try a different web browser first. If switching browsers does not work, email or call the instructor for guidance.

  **Attendance/Participation**
Your attendance and active participation are an integral part of your learning experience in this course. If you are unavoidably absent, please notify the course instructor (and Teaching Assistant if one is assigned).

  **Communication**
You are expected to follow common courtesy in all communication to include emails, online discussions, and face-to-face. All electronic communications sent
should follow proper English grammar rules to include complete sentences. This is a professional course, and you are expected to communicate as a professional.

Contributions

You are expected to offer individual contributions in class and on individual assignments, and collaborate with fellow students on assignments for which students may work together, such as group assignments.

Discussion Board

Not applicable.

Email

All email correspondence between student/instructor and peer/peer will be conducted in a professional manner following email etiquette.

- View the following link for more information on email etiquette: http://metropolitanorganizing.com/etiquette-professional-organizing-services/essential-email-etiquette-tips/

Late Work

Late, missed, or rescheduled work:

Assignments are due on their due dates. For extenuating circumstances, you may be able to get instructor permission to turn in your assignments late. However, you will only receive permission if you notify the instructor in advance of the assignment due date of the reason you need an extension of time, and the instructor agrees to the extension. If you do not get an extension, you will receive a 1-point reduction for every day that you are late. After seven days, late submissions will receive no points. Attendance on the day of the presentation is required to receive points for those activities.

Readings

Readings for a particular class should be completed before the class and before completing associated activities

Technical support

The UNC Information Technology Services (ITS) department provides technical support 24-hours per day, seven days per week. If you need computer help, please contact the ITS Help Desk by phone at +1-919-962-HELP (919-962-4357), or by email at help@unc.edu, or by visiting their website at http://help.unc.edu, or by UNC Live Chat at http://its.unc.edu/itrc/chat.
Competencies, Learning Objectives, and Assessment

**Competencies**

In this course, you will develop the following competencies.

- **HP 2.** Apply policy analysis skills to make evidence-based policy recommendations to improve the health of populations. (Primary).
- **HP 3.** Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).
- **MPH 12.** Discuss multiple dimensions of the policy-making process, including the roles of ethics and evidence. (Reinforcing).
- **MPH 13.** Propose strategies to identify stakeholders and build coalitions and partnerships for influencing public health outcomes. (Reinforcing)
- **MPH 14.** Advocate for political, social or economic policies and programs that will improve health in diverse populations. (Reinforcing)
- **MPH 17.** Apply negotiation and mediation skills to address organizational or community challenges. (Reinforcing)

**Learning Objectives**

By the end of this course, you will achieve the following learning objectives.

- **L1.** Explain steps in ideal policy analysis process
- **L2.** Identify the data needed to fully describe the problem.
- **L3.** Identify evidence-informed policy options to address the problem.
- **L4.** Select appropriate evaluation criteria and apply them to different policy options to identify strongest policy option.
- **L5.** Describe the opportunities and challenges in using research to inform public policy.
- **L6.** Describe the legislative process, both at the state and federal level.
- **L7.** Identify ways in which advocates can try to intervene to try to influence legislative policymaking.
- **L8.** Describe the federal and state rulemaking process.
- **L9.** Identify ways in which advocates can influence the rulemaking process.
- **L10.** Describe the role that litigation can play in policymaking.
- **L11.** Identify the ways in which advocates can try to influence policy making through the courts.
- **L12.** Understand the different steps in the lobbying process.
- **L13.** Understand different types of media and ways to engage the media for advocacy.
- **L14.** Understand the role of coalitions and strategies to mobilize the grassroots in advocacy.
- **L15.** Learn how to write effective legislative fact sheets.
- **L16.** Evaluate public health messages and learn how to frame public health messages for broader audiences.
- **L17.** Gain the skills needed to conduct a stakeholder analysis and work with stakeholder groups.
- **L18.** Learn the role of negotiations in policy advocacy.
- **L19.** Learn how to work effectively with governmental policy makers.

**Map**

Competencies addressed in this course, learning objectives mapped to these competencies, and assignments that assess these competencies.

<table>
<thead>
<tr>
<th>Competencies</th>
<th>Course Learning Objectives</th>
<th>Assessment Assignments with brief descriptions</th>
</tr>
</thead>
</table>
| HP 2. Apply policy analysis skills to make evidence-based policy recommendations to improve the health of populations (Primary). | L1. Explain steps in ideal policy analysis process  
L2. Identify the data needed to fully describe the problem.  
L3. Identify evidence-informed policy options to address the problem.  
L4. Select appropriate evaluation criteria and apply them to different policy options to identify strongest policy option.  
L5. Describe the opportunities and challenges in using research to inform public policy. | Summary of problem, policy options and evaluation criteria (Assignment #2)  
Policy analysis: summary of problem, policy options, and evaluation criteria (Assignment #4) |
| --- | --- | --- |
| HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level (Primary). | L6. Describe the legislative process, both at the state and federal level.  
L7. Identify ways in which advocates can try to intervene to try to influence legislative policy making.  
L8. Describe the federal and state rulemaking process.  
L9. Identify ways in which advocates can influence the rulemaking process.  
L10. Describe the role that litigation can play in policy making.  
L11. Identify the ways in which advocates can try to influence policy making through the courts.  
L12. Understand the different steps in the lobbying process.  
L13. Understand different types of media and ways to engage the media for advocacy.  
L14. Understand the role of coalitions and strategies to mobilize the grassroots in advocacy.  
L15. Learn how to write effective legislative fact sheets. | Legislative summary of proposed legislation (Assignment #1)  
Regulatory overview (summary of proposed and final regulations)(Assignment #3)  
Policy advocacy strategy (Assignment #5)  
Legislative Advocacy Fact Sheet and Presentation (Assignment #6, #7) |
<table>
<thead>
<tr>
<th>L18. Learn how to work effectively with governmental policy makers</th>
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</thead>
<tbody>
<tr>
<td>MPH 12. Discuss multiple dimensions of the policy-making process, including the role of ethics and evidence (Reinforcing).</td>
</tr>
<tr>
<td>L1. Explain steps in ideal policy analysis process</td>
</tr>
<tr>
<td>L2. Identify the data needed to fully describe the problem.</td>
</tr>
<tr>
<td>L3. Identify evidence-informed policy options to address the problem.</td>
</tr>
<tr>
<td>Exam</td>
</tr>
<tr>
<td>Policy analysis: summary of problem, policy options, and evaluation criteria (Assignment #4)</td>
</tr>
<tr>
<td>MPH 13. Propose strategies to identify stakeholders and build coalitions and partnerships for influencing public health outcomes (Reinforcing).</td>
</tr>
<tr>
<td>L17. Gain the skills needed to conduct a stakeholder analysis and work with stakeholder groups.</td>
</tr>
<tr>
<td>Policy advocacy strategy, including stakeholder analysis (Assignment #5)</td>
</tr>
<tr>
<td>MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations (Reinforcing).</td>
</tr>
<tr>
<td>L6. Describe the legislative process, both at the state and federal level.</td>
</tr>
<tr>
<td>L7. Identify ways in which advocates can try to intervene to try to influence legislative policy making.</td>
</tr>
<tr>
<td>L8. Describe the federal and state rulemaking process.</td>
</tr>
<tr>
<td>L9. Identify ways in which advocates can influence the rulemaking process.</td>
</tr>
<tr>
<td>L10. Describe the role that litigation can play in policy making.</td>
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<tr>
<td>L11. Identify the ways in which advocates can try to influence policy making through the courts.</td>
</tr>
<tr>
<td>L12. Understand the different steps in the lobbying process.</td>
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<tr>
<td>L13. Understand different types of media and ways to engage the media for advocacy.</td>
</tr>
<tr>
<td>L14. Understand the role of coalitions and strategies to mobilize the grassroots in advocacy.</td>
</tr>
<tr>
<td>Policy advocacy strategy, including stakeholder analysis (Assignment #5)</td>
</tr>
</tbody>
</table>
| L15. Learn how to write effective legislative fact sheet.  
| 19. Learn how to work effectively with governmental policy makers. |
| MPH 17. Apply negotiation and mediation skills to address organizational or community challenges (Reinforcing). |
| L18. Learn the role of negotiations in policy advocacy. |
| In class exercise (not assessed). |
Course Assignments and Assessments
This course will include graded assignments and/or exams.

<table>
<thead>
<tr>
<th>Assignments [Examples]</th>
<th>Points/Percentages</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Legislative Analysis</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td>2. Summary of problem, policy options, and evaluation criteria</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td>3. Regulatory Analysis</td>
<td>Pass/Fail</td>
</tr>
<tr>
<td>4. Exam</td>
<td>20%</td>
</tr>
<tr>
<td>5. Policy Analysis</td>
<td>30%</td>
</tr>
<tr>
<td>6. Advocacy Strategy and Stakeholders Analysis</td>
<td>30%</td>
</tr>
<tr>
<td>7. Legislative Fact Sheet</td>
<td>10%</td>
</tr>
<tr>
<td>8. Legislative Presentation</td>
<td>10%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100%</td>
</tr>
</tbody>
</table>

- **Grading**

  **Grading:** For assignments with rubrics, refer to the attached rubrics for grading details. The relative weight of each course component is shown in the table above.

**Grading Scale:**
Final course grades will be determined using the following [UNC Graduate School grading scale](#).

<table>
<thead>
<tr>
<th>Grade (H)</th>
<th>Points</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>H</td>
<td>92-100</td>
<td>High Pass: Clear excellence</td>
</tr>
<tr>
<td>P</td>
<td>75-91</td>
<td>Pass: Entirely satisfactory graduate work</td>
</tr>
<tr>
<td>L</td>
<td>60-74</td>
<td>Low Pass: Inadequate graduate work</td>
</tr>
<tr>
<td>F</td>
<td>&lt;60</td>
<td>Fail</td>
</tr>
</tbody>
</table>

For undergraduates, the grading scale is:

Final course grades will be determined using the following [UNC Undergraduate School grading system](#).

<table>
<thead>
<tr>
<th>Grade (A)</th>
<th>Points</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A (92-100)</td>
<td></td>
<td>Mastery of course content at the highest level of attainment that can reasonably be expected of students at a given stage of development. The A grade states clearly that the students have shown such outstanding promise in the aspect of the discipline under study that he/she may be strongly encouraged to continue.</td>
</tr>
<tr>
<td>B (80-91)</td>
<td></td>
<td>Strong performance demonstrating a high level of attainment for a student at a given stage of development. The B grade states that the student has shown solid promise in the aspect of the discipline under study.</td>
</tr>
<tr>
<td>C (70-79)</td>
<td></td>
<td>A totally acceptable performance demonstrating an adequate level of attainment for a student at a given stage of development. The C grade states that, while not yet showing unusual promise, the student may continue to study in the discipline with reasonable hope of intellectual development.</td>
</tr>
<tr>
<td>Grade</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>D (60-69)</td>
<td>A marginal performance in the required exercises demonstrating a minimal passing level of attainment. A student has given no evidence of prospective growth in the discipline; an accumulation of D grades should be taken to mean that the student would be well advised not to continue in the academic field.</td>
<td></td>
</tr>
<tr>
<td>F (Below 60)</td>
<td>For whatever reason, an unacceptable performance. The F grade indicates that the student’s performance in the required exercises has revealed almost no understanding of the course content. A grade of F should warrant an advisor’s questioning whether the student may suitably register for further study in the discipline before remedial work is undertaken.</td>
<td></td>
</tr>
</tbody>
</table>

- **Assignment Descriptions**
  By the end of the class, each student will have defined their problem (problem statement) and conducted a policy analysis; developed a policy advocacy strategy including a stakeholders’ analysis; and learned how to represent the position of a stakeholder group on the recommended policy. Students will have group and individual assignments:

  **Group projects**: Students will work in groups of 4-5 students around an assigned public policy problem. Each group will work on two group assignments: 1) define the problem and analyze/select a policy option from competing policy options, and 2) create an advocacy strategy around the recommended policy option, including a stakeholder’s analysis.

  **Individual assignments**: Students will be expected to summarize one proposed legislation and regulation (of the student’s choosing). These assignments are pass/fail.

  In addition to the group assignment around the assigned problem, each student will be assigned to represent a particular stakeholder group. Students are expected to write a fact sheet and make a 2-3 minute legislative presentation from the position of their assigned stakeholder on their assigned policy problem.

  **Exam**: There is one in-class exam that covers the first half of the class.

  The specific deliverables and exam are described below in the order in which it appears in the syllabus. **Electronic copies should be posted to Sakai (in the assignment section). Please attach word documents so that I can more easily edit the documents:**

  Descriptions of the assignments follow.
1. Legislative Overview (Pass/Fail): Due Jan. 28, 2019

Description. Students are expected to identify proposed legislation (bill) and write a one-two page summary of the bill. You can identify legislation at either the state or federal levels.

You need to include the following information in the bill summary:

- Bill number (check to see if a companion bill was introduced in the other body—House or Senate)
- Main sponsor and cosponsors (if any). Check to see their party affiliation—is the bill bipartisan or partisan.
- Summary of the bill.
- Where the bill was referred (and summary of any actions taken on the bill—i.e., was it voted out of committee, sent to another committee, action taken on the floor, etc.).
- Does the bill include an appropriations or finance (taxes).
- Any suggestion that this bill was amended into another bill (you are more likely to see this in Congress, where whole bills may be amended into other bills—to check, you’ll need to look at the amendments; in North Carolina appropriations bills may be included into the omnibus appropriations bill).

Potential sources:

- Pending and past legislation
  - US: https://www.congress.gov
  - NC: www.ncleg.net

Note: You can use legislation from another country, as long as you also provide some background on the legislative process in that country.

2. Regulatory Summary (Pass/Fail): Due Feb. 4, 2019

Students will analyze proposed and final regulations and write a 2-4 page summary of the regulations. I want you to look at both the proposed and final regulations of any health related regulations at the federal or state level. Note: below are instructions on how to find appropriate regulations at the federal level, which is generally easier to follow. However, you are free to do this at the state level (or in another country) if you can obtain the needed information.

To find the final and proposal regulations, start by going to the federal register website: https://www.federalregister.gov/. Then go to search documents (at the top right hand side) and enter a search term (eg, Medicaid, or health, or tobacco control). That will give you a list of documents. You want to look for something interesting with a circled R next to it (which means final rule). Click on the final rule and then open the PDF version. (You want to quickly scroll through the final version to make sure they have a section with responses to comments. You also want to look at the summary in the beginning, as well as reference to the proposed rule that preceded the final rule which is often found in the Executive Summary section).

You need to include the following information in the regulatory summary:
Proposed regulations:

- Legal cite (to the Federal Register or state Register—i.e., date of publication, Register number and page number).
- The agency that is issuing the proposed regulations.
- The legal authority for publishing the regulation (i.e., what is the statute that gives the agency the authority to issue regulations in this area).
- A summary of the proposed rule (no more than a paragraph).
- Process for commenting on the rule (i.e., whether a person can request a public hearing, whether a public hearing has been scheduled by the agency, where a person can submit public comments, the comment period, etc.).

Final regulations:

- When were the final regulations issued (date of publication, register number and page number)
- A short summary of the comments and agencies’ response. (Note: I only want you to summarize one or two of the comments/responses. Some of the final regulations in state or federal registers can be very long.) I only want to be able to determine that you have reviewed some part of the final regulations in the register, to see how the comment and agency response process works. Look at the final regulations published in the federal register, not the Code of Federal Regulations (which is where the final regulations are codified. The CFR does not include summaries of comments and agency responses).

3. Meeting with Instructor about problem statement and policy option. First meeting due no later than the week of February 11, 2019; Second meeting due no later than the week of February 25, 2019.

Based on Bardoch Steps 1 & 2

Meeting 1: Each student group will meet with the professor or TA to discuss their problem definition, potential policy solutions, and potential evaluation criteria. Students should arrange a time on or before the week of Feb. 11 to discuss their problem definition and potential policy solutions. Prior to the meeting, students should send the professor/TA a 1-2 page outline that includes the following information:

- Description of the problem (including why it is a problem, extent of the problem, etc.)
- Existing resources/programs to address the problem
- What has been tried elsewhere
- Possible policy solutions (students should identify as many potential legislative solutions as there are students in the group; one of which should be the status quo)
- Potential evaluation criteria (including costs to the government, impact, political feasibility, and 2 other evaluation criteria of your choosing)

Meeting 2: Students should arrange another meeting with the professor/TA no later than week Feb. 25th to discuss how the different policy options were rated (e.g., the evaluation matrix), and to start brainstorming on stakeholders who are likely to have an interest in the issue. Each group should be able to identify at least 10-15 stakeholder groups interested in your preferred policy. You have to have at
least two groups that would oppose the option and/or seek changes to the proposed policy. Prior to the meeting, students should send the professor/TA a 1-2 page outline that includes the following information:

- Description of the problem (including why it is a problem, extent of the problem, etc.)
- A short description of the policies you chose to evaluate (e.g., 2-3 sentences).
- A short description of your evaluation criteria (along with how the evaluation criteria are weighted)
- Your evaluation matrix
- Your list of potential stakeholders (those who are likely to be interested in your recommended policy)

Students will take an in-class exam that covers the first half of the class. It will cover the roles of the legislature, executive agencies, and courts in the policy making process. It will also cover the different stages of policy analysis (Bardoch). The exam will include multiple choice and short answer questions.

5. Policy Analysis (30% of grade). Due Friday, March 8, 2019
Based on Bardoch Steps 1-8. Make sure to look at some of the examples from past classes on Sakai. Also there is a document on Sakai with Policy Analysis paper hints. (Please turn in your paper early if you have it completed before spring break).

Each group will prepare a 10-20 page paper (double spaced) that:

a) Describes the problem you want to address. Include information on who the problem affects, how many people are affected, and why there is a problem.

b) Identifies any other programs/systems that exist to address the problem. Include a description of the existing programs/systems (e.g., services provided, people covered, funding sources, etc.) and gaps or limitations in existing programs/systems.

c) Describes your policy goals. What do you want to accomplish?

d) Includes a short description of 3-4 alternative policy options that could address their problem. At least one of these options should be to maintain the status quo. For each policy option, you should:

i. Describe the option, and project how it will impact on the problem (projecting outcomes)

ii. Describe whether the policy has been implemented elsewhere, and if so, what the experience has been (including any evaluations of the option). Note: I will be looking to see the extent to which your policies are evidence-based (e.g., have they been tested elsewhere and, if so, did they help address the problem you are trying to solve.)

iii. Any information on costs involved, ease of implementation, etc. You should try to include information needed to assess the different policy options (based on the evaluation criteria you selected).

e) Analyze the policies using at least five evaluation criteria you will use to compare the different policy options. You must include costs to the state/government, impact (e.g., number of people helped), and political feasibility, students should select at least two other criteria.

f) Present your analysis of the different policy options using the evaluation criteria chosen. Present in both matrix and in descriptive format.

g) Final recommendation. You should have a conclusion that explains briefly why your final recommendation is the best to address the problem.
Each group will come to class prepared with a short message that frames their public policy problem and solution using the 27-9-3 rule:

- 27 words, 9 seconds, 3 points
- What do you want your audience to think or understand about your issue?
- How do you want them to feel about what you have just said?
- What do you want the audience to do about it? (policy solution)


7. Stakeholder Analysis. Draft due March 25, 2019. Final stakeholder analysis will be included as part of your Advocacy paper. (Pass/Fail).
Each student group will prepare a stakeholder analysis of the final policy recommended from Step #4. The stakeholder analysis should include 10-15 different stakeholder groups. It should be presented in grid format and have the following information for your recommended policy option:

a) Will the group be a supporter or opponent? (For ease of presentation, you might want to separate the supporters from opponents). Will they offer strong support, moderate support, neutral, moderate opposition, or strong opposition?
b) What is their reason for supporting or opposing your recommended policy option?
c) How powerful is the group? Are they very powerful, somewhat powerful, or weak? (Note: this is closely connected with the next point).
d) What is the resources that this group can bring to the effort? (e.g., can they set policy themselves (policy makers), do they have a PAC or make substantial financial contributions to candidates, do they have lobbyists, personal connections to policy makers, ability to mobilize grassroots, provide information/research, etc.)
e) What is the likelihood of this group getting involved in this issue (very likely, somewhat likely, or not likely). Note: Just because a group has an “interest” in an issue does not mean that they will use their political capital to actively engage in the issue.
f) How can you influence the stakeholders’ positions, if at all? Can you compromise to neutralize your opponents or to get them to support your position (remember, not all compromises are good compromises—some would undermine what you are trying to accomplish)? Alternatively, can you find supporters even within your large group of opponents—for example, if business and industry will oppose as a group, are there any businesses that would support your position who can counter their industry position?

I also want to know which stakeholders the different group members will represent in the final presentation. Ideally, there will be at least two groups that support the final recommendation, and at least two groups who oppose it (one or more of these could be groups that would not support unless the bill is changed to address their concerns).

Note: I am looking for stakeholders that might get involved in the policy advocacy process. Certain groups/individuals do not fall into that category. For example:

- Federal organizations or agencies are unlikely to lobby at the state level.
- State agencies (e.g., NC Division of Aging, Department of Health and Human Services) or the Governor’s office might get involved. However, the state agencies will follow the Governor’s lead
in their legislative approach, so you don’t need to include the Governor AND the agencies as separate stakeholders.

- Don’t include political parties as stakeholders. While they are stakeholders, they won’t lobby. (They might work behind the scenes, but won’t be helpful as a stakeholder group to represent for the fact sheet.)
- Don’t include individuals as stakeholders, eg, older adults, people of color, people with disabilities. They will only know about an issue if they are part of an advocacy group that is following the legislative process. So, instead of older adults (if it’s an aging related issue), include AARP (or other advocacy group representing older adults).
- Also, national organizations don’t generally lobby at the state level (so you shouldn’t include CDC, CMS, or the AHA or AMA. This about their state-level equivalents.)

Students will be asked to share their fact sheets with 2-3 other students (from different groups) in advance of class. Students will be asked to use the fact sheet grading rubric to analyze the other students’ fact sheet, and will give them feedback in class.

Students must complete and print out the certificate of completion from the NIH Plain Language seminar.

Make sure to look at an example of a Policy Advocacy paper (and stakeholders analysis) on Sakai. There are two documents that go into more detail on Policy Advocacy paper hints and stakeholders analysis hints on Sakai.

Each group will prepare a ~10 page paper (double spaced) that includes the following information:

a) Overview of the problem and your policy solution. While you already wrote a separate paper for the policy analysis, you should provide a summary at the beginning of your policy advocacy paper to ground the reader on the problem you are trying to address and your proposed legislation.

b) Your long-term and short-term policy goals (i.e., if you can’t get everything you want, what are you willing to compromise on). Remember, the goal is still to achieve your long-term goals, but you want to think about potential compromises early on, in case you can’t get your full long-term strategy implemented at once. (Ideally, your short term strategy is a step towards your longer term strategy.)

c) The 2-3 major points you want to get across in your policy advocacy (eg, what is your elevator speech). What are the best arguments in support of your long-term goal? What are your opponents’ likely arguments? What are your best responses to what your opponents are likely to argue? Your best 2-3 points should be what you focus on in your fact sheet.

d) A stakeholder analysis. Who are the key stakeholders in support and opposition to the proposal (incorporating the stakeholders grid from Requirement #7 above. You should include your grid as an Appendix to your advocacy strategy paper, but include 1-2 paragraphs in the paper that highlight your key supporters and opponents, and the strengths/challenges they will bring/create.

e) Your legislative or regulatory strategy.
   i) If legislative, who will you seek to introduce the legislation; what committee will the bill be referred to (and can you influence that choice); what is your overall communications strategy with the legislature?
iii) How will you get your other allies to communicate with policy makers?
iv) If regulatory, what is your strategy for getting the executive branch to make the regulatory changes; does the agency have the authority to make the changes, etc. Can you prepare your allies to write comments in support of the changes?
f) Do you plan to work in a coalition to accomplish your goal? If so, discuss whether the coalition already exists, whether you would need to form it, and which groups would be part of it? Is this an ad-hoc coalition (around the specific issue), or a more long-standing coalition. What role will they play?
g) The role, if any, will the media play—and if there is a role, describe your media strategy
h) Grassroots mobilization plan (if any). Do you want to mobilize the grassroots, and if so, how will you accomplish this?
i) Conclusion that summarizes the key points in the paper.

10. Advocacy Fact Sheet (10% of Grade). Due: April 22, 29, 2019.
Each student will be expected to write a 1-2 page fact sheet on why policy makers should support your proposal. Keep the following suggestions in mind as you write your fact sheet. More information is available on the Fact Sheet and Presentation Lessons in Sakai. Also, please look at some of the examples of fact sheets on Sakai.

- Remember, you are being asked to represent a stakeholder and advocate a position. Therefore, these fact sheets should be advocacy pieces.
- Tell the legislators what bill you want them to support, oppose, or amend and make your ask large and clear (Support Bill XXX: An Act to ....) If there isn’t a real bill number, make one up for purposes of the exercise.
- Explain specifically but succinctly the problem and what the legislation does in lay terms. You want to explain the problem and your proposed solution, and make your points understandable to someone who knows nothing about the topic. Make your arguments short, easy to understand, and compelling. Don’t assume the legislator has heard of the bill or even your topic. And don’t use acronyms, unless you first explain them!
- Structure your argument into 2-3 points that follow logically from each other. Back up each point with evidence or explanation.
- Use your subheadings to argue your position. Instead of “problem” as the subheading—state “Too many people are uninsured, which adversely impacts both the uninsured and the rest of the state.” Remember, policy makers may not read your whole fact sheet—therefore your subheadings should make your argument and draw the reader into the rest of the fact sheet.
- Keep the fact sheet to one page, if possible. Legislators may not turn the fact sheet over to look at the back of the sheet.
- Make sure your design element helps draw attention to your main points rather than distract from them. In general, simpler is better. If you use images or graphics, make sure they further your main arguments.
- Always put your name, the organization you represent, and your contact information on the fact sheet (usually at the bottom.) That way, legislators or the staff can follow up to ask you questions. (For purposes of the exercise, include your name, organization, and contact information—but it’s totally fine if you don’t include your real address or phone number—a made up one is fine.)
Note: Fact sheets need to be written for a lay audience to understand. The CDC has a nice publication on everyday words for public health communications:

Each student will be expected to give a 2-3 minute presentation as if you were testifying before a legislative committee on why policy makers should support your proposal. **More information is available on Sakai about fact sheets and advocacy presentations.**

- If you are testifying in a committee meeting, start by thanking the chair (or co-chairs), and then the committee. For example, Then, start your presentation with your name and affiliation and what you are here to speak about.
- Early in your presentation, state what you want the legislators to do. That can be at the beginning of your presentation, or if you are using a case history to illustrate the need, you can talk about what you want the legislature to do after you give your case history.
- You need to give some brief explanation of the need you are trying to address. Why should the legislature support (or oppose) this proposal—what problem are they addressing (or why would this bill make the problem worse)?
- Practice what you are going to say, so that you can establish eye contact with your audience. It is VERY important to have some eye contact (in order to read your audience to see if they are following your arguments).
- Don’t read your presentations. It’s ok to refer down to your notes, but the audience will be much more interested in listening if you establish eye contact.
- Make sure that you talk slow enough for the audience to follow.
- If you were really making an advocacy presentation, you would want to try to recognize the policy makers for the work they have already done on this issue, or else refer to comments or questions they previously asked. (This will draw them back to listen to your comments).
- At the end of your presentation, you may want to give a short summary of why you want the legislature to act (or oppose) your bill. Then thank them for their time. You can say that you are willing to answer questions, but you cannot answer the questions directly. The legislative process is very formal. You must wait for the chair to recognize the committee member before you can answer their question. This is true for follow-up questions too.

**Course-at-a-Glance**
The instructor reserves to right to make changes to the syllabus, including project due dates and test dates. These changes will be announced as early as possible.

<table>
<thead>
<tr>
<th>Unit/Week/Day</th>
<th>Topic</th>
<th>Assignment Due</th>
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</thead>
<tbody>
<tr>
<td>Class 1: January 14, 2019</td>
<td>Overview of Class</td>
<td>None</td>
</tr>
<tr>
<td>Class 2: January 28, 2019</td>
<td>Congressional and NC Legislative Process</td>
<td>Legislative Summary (Assignment #1)</td>
</tr>
<tr>
<td>Class 3: February 4, 2019</td>
<td>Rulemaking and the Judicial System</td>
<td>Regulation Summary (Assignment #2)</td>
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<td>Class</td>
<td>Date</td>
<td>Topic</td>
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<tr>
<td>Class 4</td>
<td>Feb. 11, 2019</td>
<td>Nuts and Bolts of Lobbying Using Research to Inform Policy</td>
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<tr>
<td>Class 5</td>
<td>Feb. 18, 2019</td>
<td>Negotiations Skills</td>
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<tr>
<td>Class 6</td>
<td>Feb. 25, 2019</td>
<td>Stakeholders Analysis</td>
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<td>Class 7</td>
<td>March 4, 2019</td>
<td>Discussion of Policy Options and Exam</td>
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<tr>
<td>Class 8</td>
<td>March 18, 2019</td>
<td>Framing Messages for Policy Advocacy</td>
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<tr>
<td>Class 9</td>
<td>March 25, 2019</td>
<td>Coalition Building and Mobilizing the Grassroots</td>
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<tr>
<td>Class 10</td>
<td>April 1, 2019</td>
<td>Using the Media to Get Your Message Across</td>
</tr>
<tr>
<td>Class 11</td>
<td>April 8, 2019</td>
<td>Clear Communications: Writing Fact Sheets for General Audiences</td>
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<tr>
<td>Class 12</td>
<td>April 15, 2019</td>
<td>Working with Agency Officials, Developing an Advocacy Campaign</td>
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<tr>
<td>Class 13</td>
<td>April 22, 2019</td>
<td>In Class Legislative Presentations Critique by Legislators</td>
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<tr>
<td>Class 14</td>
<td>April 29, 2019</td>
<td>(Final exam period)</td>
</tr>
</tbody>
</table>
## Course Schedule

The instructor reserves to right to make changes to the syllabus, including project due dates and test dates. These changes will be announced as early as possible.

### January 14, 2019 (Class 1): Overview of Class

<table>
<thead>
<tr>
<th>Class 1</th>
<th>January 14, 2019</th>
</tr>
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<tbody>
<tr>
<td><strong>Topic</strong></td>
<td>Overview of Class</td>
</tr>
<tr>
<td>Competency</td>
<td>HP 2. Apply policy analysis skills to make evidence-based policy recommendations to improve the health of populations. (Primary). HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).</td>
</tr>
</tbody>
</table>
| Class Learning Objectives | • Understand how the course is structured, what it will cover, and student assignments  
• Explain steps in ideal policy analysis process  
• Identify the data needed to fully describe the problem |
| Required Readings | Review Slides  
Begin Policy Analysis Process (Problem Definition)  

### January 28, 2019 (Class 2): The Legislative Process

<table>
<thead>
<tr>
<th>Class 2</th>
<th>January 28, 2019</th>
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<tbody>
<tr>
<td><strong>Topic</strong></td>
<td>The Legislative Process</td>
</tr>
<tr>
<td>Guest Speaker</td>
<td>Rachel Dolin, PhD, Professional Staff, Committee on House Ways and Means, Subcommittee on Health (confirmed)</td>
</tr>
</tbody>
</table>
| Competency | HP 3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).  
MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. |
| Class Learning Objectives | • Describe the legislative process, both at the state and federal level.  
• Identify ways in which advocates can try to intervene to try to influence legislative policy making. |
| Required Readings | Review slides on the US and NC legislative process  
Continue problem definition discussion  
Bardoch, Steps 3-7, pp 16-70. |
Appendix B, What Governments Do, pp. 141-149.

**Congress:**
US House of Representatives. The legislative process. (Shorter, more condensed version of the Congressional legislative process)
[http://www.house.gov/content/learn/legislative_process/](http://www.house.gov/content/learn/legislative_process/)

**North Carolina:**
How a Law is Made. NC General Assembly. Available at:
[http://www.house.gov/content/learn/legislative_process/](http://www.house.gov/content/learn/legislative_process/)

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<tbody>
<tr>
<td></td>
<td>John V. Sullivan. How Our Laws are Made. 2007. (More detailed description of the Congressional legislative process)</td>
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<tr>
<td></td>
<td><a href="http://thomas.loc.gov/home/lawsmade.toc.html">http://thomas.loc.gov/home/lawsmade.toc.html</a></td>
</tr>
</tbody>
</table>

Watch (Youtube):
- Congress.gov: Overview of the Legislative Process (5:11 min)
  [https://www.youtube.com/watch?v=E1CIWwu6KdQ&list=PLpAGnumt6iV6j07liSyksxaQe_KmPbeow](https://www.youtube.com/watch?v=E1CIWwu6KdQ&list=PLpAGnumt6iV6j07liSyksxaQe_KmPbeow)
- Congress.gov: Introduction and Referral of Bills (3:20 min)
  [https://www.youtube.com/watch?v=1DSruRQ2MNs&list=PLpAGnumt6iV6j07liSyksxaQe_KmPbeow&index=2](https://www.youtube.com/watch?v=1DSruRQ2MNs&list=PLpAGnumt6iV6j07liSyksxaQe_KmPbeow&index=2)
- Congress.gov: Committee consideration (3:41 minutes)
  [https://www.youtube.com/watch?v=foCfGO_V37A](https://www.youtube.com/watch?v=foCfGO_V37A)
- Congress.gov: House Floor (3:54 minutes)
  [https://www.youtube.com/watch?v=3hfhlaeb4CM](https://www.youtube.com/watch?v=3hfhlaeb4CM)
- Congress.gov: Senate Floor (4:18 minutes)
  [https://www.youtube.com/watch?v=foCfGO_V37A](https://www.youtube.com/watch?v=foCfGO_V37A) (includes description of filibuster)
- Congress.gov: Resolving Differences (3:31 minutes)
  [https://www.youtube.com/watch?v=foCfGO_V37A](https://www.youtube.com/watch?v=foCfGO_V37A)
- Congress.gov: Presidential Actions (2:00 min.)
  [https://www.youtube.com/watch?v=u6XR8mqqfYs&index=9&list=PLpAGnumt6iV6j07liSyksxaQe_KmPbeow](https://www.youtube.com/watch?v=u6XR8mqqfYs&index=9&list=PLpAGnumt6iV6j07liSyksxaQe_KmPbeow)
<table>
<thead>
<tr>
<th>Class Activity</th>
<th>Come prepared with questions for guest speaker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignments/Deadlines</td>
<td>Assignment #1. LEGISLATION SUMMARY. (Pass/Fail) Students will be expected to identify proposed legislation (bill) and write a 1-2 page summary of the bill. You can choose either state or federal legislation. See #1 in Requirements and Expectations Section for more specific information about what should be included in your summary. Group Project: Students should meet with other team members, contact the community contact to set up a time to talk, and develop their team contract.</td>
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**February 4, 2019 (Class 3): Rulemaking and the Judicial System**

<table>
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<tr>
<th>Class 3</th>
<th>February 4, 2019</th>
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<tbody>
<tr>
<td>Topic</td>
<td>Rulemaking and the Judicial System</td>
</tr>
<tr>
<td>Guest Speaker</td>
<td>Elizabeth Edwards, JD, National Health Law Program (confirmed)</td>
</tr>
</tbody>
</table>
| Competency | HP 3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).

MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. |

| Class Learning Objectives | • Describe the federal and state rulemaking process.
• Identify ways in which advocates can influence the rulemaking process.
• Describe the role that litigation can play in policy making.
• Identify the ways in which advocates can try to influence policy making through the courts. |

| Required Readings | Review slides on the US and NC regulatory process
Review slides on the judicial system
Review discussion of HIPAA regulation (in Sakai)

| Optional/Additional Resources | US Administrative Procedures Act:
5 U.S.C. 551(4)(5)(definition of rule); 552 (agency rules), 553 (rulemaking) http://www4.law.cornell.edu/uscode/5/551.html |
NC Administrative Procedures Act:

NCGS §150B et. seq. 150B-2 (definition of a rule), 150B-18 – 150B-21.28 (rulemaking). Available online at: http://www.ncleg.net/EnactedLegislation/Statutes/HTML/ByChapter/Chapter_150B.html


Class Activity
Each student should come prepared to give an overview of their policy problem, potential policy options, and the evaluation criteria they propose to use.

Assignments/Deadlines

<table>
<thead>
<tr>
<th>Assignment #2. REGULATION SUMMARY (Pass/Fail) Students will be expected to analyze proposed regulations and write a 2-4 page summary of the regulations. See #2 in the Requirements and Expectations section for more information about what should be included in the summary.</th>
</tr>
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</table>

- **February 11, 2019 (Class 4): Nuts and Bolts of Lobbying, Using Research to Inform Policy**

<table>
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<tr>
<th>Class 4</th>
<th>February 11, 2019</th>
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<tbody>
<tr>
<td><strong>Topic</strong></td>
<td>Nuts and Bolts of Lobbying, Using Research to Inform Policy</td>
</tr>
</tbody>
</table>
| **Guest Speakers** | Harry Kaplan, JD, Partner, McGuire Woods (confirmed) (6:30-7:40)  
Tiffany Gladney, NC Rural Center (confirmed)  
Tom Vitiglione (confirmed) |
| **Competency** | HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).  
MPH 12. Discuss multiple dimensions of the policy-making process, including the roles of ethics and evidence. (Reinforcing).  
MPH 13. Propose strategies to identify stakeholders and build coalitions and partnerships for influencing public health outcomes  
MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. (Reinforcing) |
| **Class Learning Objectives** | • Understand the different steps in the lobbying process.  
• Describe the opportunities and challenges in using research to inform public policy. |
| Required Readings | Review slides on lobbying  
Review Research and Policy Slides  
Part One: How To Lobby (Chapters 1-8). (Available on Sakai)  
| Class Activity | Come prepared with questions for lobbyist guest speakers. |  
| Assignments/Deadlines | **Assignment #3.** PROBLEM DEFINITION AND POLICY OPTIONS. Students should schedule a meeting with the professor and/or TA (if available) to discuss their problem definition, potential policy solutions, and potential |
evaluation criteria. Students should arrange a time on or before the week of Feb. 11 for the meeting. Prior to meeting with the professor/TA, students should send a 1-2 page paper that includes the information listed in #3 above in the Assignment Description (information for the first meeting).

- **February 18, 2019 (Class 5): Negotiations Skills**

<table>
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<tr>
<th>Class 5</th>
<th>February 18, 2019</th>
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<tbody>
<tr>
<td><strong>Topic</strong></td>
<td>Negotiations Skills</td>
</tr>
<tr>
<td>Guest Speakers</td>
<td>Noel Mazade, PhD, Professor of the Practice, UNC School of Social Work (confirmed)</td>
</tr>
<tr>
<td>Competency</td>
<td>MPH 17. Apply negotiation and mediation skills to address organizational or community challenges. (Reinforcing)</td>
</tr>
<tr>
<td>Class Learning Objectives</td>
<td>• Learn the role of negotiations in policy advocacy.</td>
</tr>
<tr>
<td>Class Activity</td>
<td>Come prepared with questions for guest speakers.</td>
</tr>
</tbody>
</table>

- **February 25, 2019 (Class 6): Stakeholders Analysis**

<table>
<thead>
<tr>
<th>Class 6</th>
<th>February 25, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Topic</strong></td>
<td>Stakeholders Analysis</td>
</tr>
<tr>
<td>Guest Speakers</td>
<td>Jeanne Lambrew, PhD (confirmed), Secretary, Maine Department of Health and Human Services, Senior Fellow at the Century Foundation. Previously Deputy Assistant to the President for Health Policy.</td>
</tr>
<tr>
<td>Competency</td>
<td>MPH 13. Propose strategies to identify stakeholders and build coalitions and partnerships for influencing public health outcomes (Reinforcing)</td>
</tr>
</tbody>
</table>
| Class Learning Objectives | • Gain the skills needed to conduct a stakeholder analysis and work with stakeholder groups.  
• Learn the role of negotiations in policy advocacy. |
developing your policy analysis (which includes a short stakeholder’s analysis).

**Optional/Additional Resources**

|-------------------------------|---------------------------------------------------------------------------------|

**Class Activity**

<table>
<thead>
<tr>
<th>Class Activity</th>
<th>Come prepared with questions for guest speaker.</th>
</tr>
</thead>
</table>

**Assignments/Deadlines**

<table>
<thead>
<tr>
<th>Assignments/Deadlines</th>
<th>Assignment #3. PROBLEM DEFINITION AND POLICY OPTIONS. Students should schedule a meeting with the professor and/or TA (if available) to discuss their problem definition, potential policy solutions, and potential evaluation criteria. Students should arrange a time on or before the week of Feb. 36 for the second meeting. Prior to meeting with the professor/TA, students should send a 1-2 page paper that includes the information listed in #3 above in the Assignment Descriptions (information for the second meeting).</th>
</tr>
</thead>
</table>

- **March 4, 2019 (Class 7): Exam and Discussion of Policy Options**

<table>
<thead>
<tr>
<th>Class 7</th>
<th>March 4, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Discussion of Policy Options (First Half of Class)</td>
</tr>
<tr>
<td></td>
<td>Exam (Second Half of Class)</td>
</tr>
<tr>
<td>Competency</td>
<td>HP 2. Apply policy analysis skills to make evidence-based policy recommendations to improve the health of populations. (Primary).</td>
</tr>
</tbody>
</table>
| Class Learning Objectives | • Identify the data needed to fully describe the problem.  
• Identify evidence-informed policy options to address the problem.  
• Select appropriate evaluation criteria and apply them to different policy options to identify strongest policy option. |
| Class Activities | Each team should come prepared to give an overview of their policy problem, potential policy options, and evaluation criteria. Each group will give a 5 minute presentation on their problem, and potential policy options during the first hour. After, students will take their exam. (They have 2 hours to complete the exam). The exam will be on Sakai. |
| Assignments/Deadlines | Exam: Covers everything up until the day of the exam. See #4 in Assignments Above.  
Assignment #5. PROBLEM STATEMENT AND POLICY ANALYSIS (30% of grade)—DUE FRIDAY, MARCH 8. Students should turn in their problem statement and policy option: An analysis of at least 4-5 different policy options to address the problem (at least one of which should be the status quo). (Note: there should be as many policy options as there are students in the group.) More specific |
information about what should be included in this paper is in #5 in the Assignment Descriptions.

- March 11, 2019 (Spring Break): No Class

- March 18, 2019 (Class 8): Framing Messages for Policy Advocacy

<table>
<thead>
<tr>
<th>Class 8</th>
<th>March 18, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Framing Messages for Policy Advocacy</td>
</tr>
<tr>
<td>Guest Speaker</td>
<td>Gene Matthews, JD, Director, Southeastern Region, Network for Public Health Law, NC Institute for Public Health (confirmed)</td>
</tr>
<tr>
<td>Competency</td>
<td>MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. (Reinforcing)</td>
</tr>
<tr>
<td>Class Learning Objectives</td>
<td>● Evaluate public health messages and learn how to frame public health messages for broader audiences.</td>
</tr>
<tr>
<td>Required Readings</td>
<td>Review slides: Framing Messages</td>
</tr>
<tr>
<td></td>
<td>Jonathan Haidt: TED talk on the moral mind: <a href="https://www.ted.com/talks/jonathan_haidt_on_the_moral_mind">https://www.ted.com/talks/jonathan_haidt_on_the_moral_mind</a></td>
</tr>
<tr>
<td>Assignments/Deadlines</td>
<td>Assignment #6. FRAMING EXERCISE (Pass/Fail). Students should come prepared with a short message that frames their public policy problem and solution. It needs to be explainable in no more than 27 words, nine seconds, and 3 points. See #6 in the Assignment Descriptions for more detailed description of the framing exercise.</td>
</tr>
</tbody>
</table>

- March 25, 2019 (Class 9): Coalition Building and Mobilizing the Grassroots

<table>
<thead>
<tr>
<th>Class 9</th>
<th>March 25, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Coalition Building and Mobilizing the Grassroots</td>
</tr>
<tr>
<td>Guest Speakers</td>
<td>Betsy Vetter, Director of Field Grassroots, American Heart Association (confirmed)</td>
</tr>
<tr>
<td></td>
<td>Willona Stallings, Care Share Health Alliance (confirmed)</td>
</tr>
<tr>
<td></td>
<td>Morgan Wittman Gramann, Executive Director, NC Alliance for Health</td>
</tr>
<tr>
<td>Competency</td>
<td>MPH 13. Propose strategies to identify stakeholders and build coalitions and partnerships for influencing public health outcomes (Reinforcing)</td>
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</tbody>
</table>
| Class Learning Objectives | • Understand the role of coalitions and strategies to mobilize the grassroots in advocacy.  
• Gain the skills needed to conduct a stakeholder analysis and work with stakeholder groups. |
| Required Readings | Review slides on coalition building and mobilizing the grassroots  
http://www.countyhealthrankings.org/sites/default/files/eightstep.pdf  (On Sakai)  
Community Catalyst.  It’s All about the Base: A Guide to Building a Grassroots Organizing Program., pp. 1-23.  I’d like you to look through the document, but you do not need to read the specific state examples.  Available at:  
http://www.communitycatalyst.org/doc-store/publications/strength_in_numbers_a_guide_to_building_communitycoalitions_aug03.pdf  (On Sakai)  
| Assignments/Deadlines | Assignment #7 Stakeholder Analysis Draft (Pass/Fail).  Students should submit a draft of your stakeholder analysis grid for the policy option you selected as your preferred policy option.  More specific information about what should be included in this paper is in #7 in the Assignment Descriptions. |

- April 1, 2019 (Class 10): Using the Media to Get Your Message Across

<table>
<thead>
<tr>
<th>Class 10</th>
<th>April 1, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Using the Media to Get Your Message Across</td>
</tr>
<tr>
<td>Guest Speaker</td>
<td>Rose Hoban, BSN, MJ, MPH, Executive Director, NC Health News (confirmed)</td>
</tr>
<tr>
<td>Competency</td>
<td>HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).</td>
</tr>
<tr>
<td>Class Learning Objectives</td>
<td>• Understand different types of media and ways to engage the media for advocacy.</td>
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<td>---------------------------</td>
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</tr>
<tr>
<td>Required Readings</td>
<td>Review slides: Media</td>
</tr>
<tr>
<td></td>
<td>Come prepared with questions for media guest speaker</td>
</tr>
<tr>
<td></td>
<td>Community Catalyst. What is Media Advocacy? PowerPrism.</td>
</tr>
<tr>
<td></td>
<td>Slides on Writing Effective Fact Sheets</td>
</tr>
</tbody>
</table>

- **April 8, 2019 (Class 11): Clear Communication: Writing Fact Sheets for General Audiences**

<table>
<thead>
<tr>
<th>Class 11</th>
<th>April 8, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Clear Communication: Writing Fact Sheets for General Audiences</td>
</tr>
<tr>
<td>Competency</td>
<td>HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).  MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. (Reinforcing)</td>
</tr>
<tr>
<td>Class Learning Objectives</td>
<td>• Learn how to write effective legislative fact sheets.</td>
</tr>
<tr>
<td>Assignment/ Deadlines</td>
<td>Before class, students will be assigned to groups of 3. You will all be asked to share your fact sheets with other members of this group at least 2 days in advance. You should come to class having critiqued the fact sheet (using the grading rubric in this syllabus). Students will be broken into groups to discuss the fact sheets and make suggestions for improvements. See assignment #8 in assignment descriptions.</td>
</tr>
</tbody>
</table>

- **April 15, 2019 (Class 12): Working with Agency Officials, Developing an Advocacy Campaign**

<table>
<thead>
<tr>
<th>Class 12</th>
<th>April 15, 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Working with Agency Officials, Developing an Advocacy Campaign</td>
</tr>
</tbody>
</table>
Guest Speakers
Leah Devlin, Former NC State Health Director (confirmed)
Becky Slifkin, Former Director of the Office of Planning, Analysis and Evaluation, Health Resources and Services Administration, US Department of Health and Human Services (confirmed)

Competency
HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).
MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. (Reinforcing)

Class Learning Objectives
Learn how to work effectively with governmental policy makers.

Required Readings
Review slides: Developing an Advocacy Campaign
Silberman, P. Consumers Guide to Health Care Policy Making: How to Change North Carolina Health Policies. 1997 Aug. (on Sakai) (Note: this is outdated, but still may provide helpful steps for you to think about in developing your advocacy strategy).

Optional/Additional Resources

April 22, 2019 (Class 13): In Class Presentations

Class 13  April 22, 2019

Policy Advocacy: In Class Presentations

Guest Speakers (Legislative Respondents)
Lanier Cansler, CPA, Former Secretary, NC Department of Health and Human Services, Former Representative (R), NC House (confirmed)
Deborah Ross, JD, Former Representative (D), NC House (confirmed)

Competency
HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).
MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. (Reinforcing)

Class Learning Objectives
This is the culmination of the work that the students did throughout the semester, and should incorporate work from earlier in the semester.

Class Activity
Mock legislative presentations
Assignments/Deadlines

<table>
<thead>
<tr>
<th>Class 14</th>
<th>April 29, 2019 (Class 14): In Class Presentations (During Exam Period, 4:00 pm – 7:00 pm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic</td>
<td>Policy Advocacy: In Class Presentations</td>
</tr>
<tr>
<td>Guest Speakers (Legislative Respondents)</td>
<td>Marilyn Avila, Former Representative (R), NC House (confirmed)</td>
</tr>
<tr>
<td>Rick Glazier, JD. Former Representative, NC House of Representatives (confirmed)</td>
<td></td>
</tr>
<tr>
<td>Competency</td>
<td>HP3. Demonstrate the ability to influence the formulation of health policies by developing a broad-based policy advocacy strategy for policy change at the regulatory or legislative level. (Primary).</td>
</tr>
<tr>
<td>MPH 14. Advocate for political, social or economic policies and programs that will improve health in diverse populations. (Reinforcing)</td>
<td></td>
</tr>
<tr>
<td>Class Learning Objectives</td>
<td>This is the culmination of the work that the students did throughout the semester, and should incorporate work from earlier in the semester.</td>
</tr>
<tr>
<td>Class Activity</td>
<td>Mock legislative presentations</td>
</tr>
<tr>
<td>Assignments/Deadlines</td>
<td>Three final assignments are due:</td>
</tr>
<tr>
<td>Fact sheet. Each student in the presenting groups will be expected to write a 1-2 page fact sheet. See assignment #10 in the Assignment Description.</td>
<td></td>
</tr>
<tr>
<td>Presentation. Each student in the presenting groups will be expected to give a 2-3 minute presentation to other students. The presentation should be in the format of giving oral testimony in a legislative committee or during a regulatory hearing. See assignment #11 in the Assignment Description.</td>
<td></td>
</tr>
</tbody>
</table>

Grading Rubrics

<table>
<thead>
<tr>
<th>Policy Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
</tr>
<tr>
<td>Policy Analysis</td>
</tr>
</tbody>
</table>
## Overview of the Problem and Policy Goals

Description of the problem, including:

- Specification of the problem that you are trying to address. Must provide compelling information to explain why this is a problem, information on who the problem affects, how many people are affected, and why there is a problem.
- A description of the existing programs/systems (e.g., services provided, people covered, funding sources, etc.) and gaps or limitations in existing programs/systems.
- Policy goals (what you are trying to accomplish). (25 points)

### Points Breakdown

- Providing clear explanation of the problem, such as: who it affects (and any disparities), trends over time, comparisons (to other states/countries), economic or other consequences from the problem. (Note: not all of these factors will be appropriate for every problem).
  - (23-25.0 points)

- Describes existing programs/services and any gaps thereof.
  - (19-23 points)

- Identifies the goals of the policy analysis.
  - (15-19 points)

- Does not provide sufficient information to show that this is a problem that needs to be addressed or the resources that already exist, and doesn’t talk about the goals.
  - (<15 points)

## Short Summary of Policy Options and Evaluation Process

The paper should first include a short description of the different policy options considered, the evaluation criteria you selected, and the rating scale and weighting (if any) for the different evaluation criteria (10 points)

### Points Breakdown

- Provides an overview of the policy options that will be considered (with about 1-2 sentence description of each), an explanation of each evaluation criteria (as needed), the rating scale, and any weights applied to different evaluation criteria (if any).
  - (9-10 points)

- Provides some of the information, but doesn’t explain them well enough for the reader to understand what the policy options are, the evaluation criteria used, or rating scale and weights (if any).
  - (7.5-9 points)

- Doesn’t address most of the factors listed in the prompt.
  - (6-7.5 points)

- Doesn’t include any introductory information.
  - (<6 points)
| Analysis of the different policy options including: | (18-20 points) Includes a clear explanation of each policy and the evidence to support the policy. Explains how each policy is ranked on the different evaluation criteria (with the score). Provides enough information to support the score assigned. | (15-18 points) Provides some information to support the policy options and grades assigned. However, explanation isn’t clear, or provides insufficient evidence on some or all of the policy options. | (12-15 points) Does not adequately explain the policy option, provide evidence to support the different policies, or explain grades/rankings. | <12 points Doesn’t provide any information to support policy options or how the policies are evaluated. |
| Presentation in matrix form. The matrix should summarize the information you included in the paper and should be easy to understand and interpret. Should include a total column (if using numbers) so reader can easily see which policy ranks highest. (10 points) | (9-10 points) Provides matrix that compares all the different policy options and evaluation criteria. Matrix is easy to read and understand, and highlights which policy option ranks the highest. | (7.5-9 points) Includes a matrix, but is hard to read or understand. Doesn’t include a way to easily assess which option scored highest. | (6-7.5 points) May include elements of the matrix, but does not include a complete matrix with side-by-side comparisons of each option. | (<6 points) Does not include any matrix. |
| Final Recommendation. The paper should end with the recommendation you will be advocating for as part of your Advocacy paper. This should follow from your evaluation of the different policy option. (10 points) | (9-10 points) Student gives a final recommendation (as part of the conclusion) that explains why they are recommending a particular policy option. Generally this should be the option that scores | (7.5-9 points) The student provides a final recommendation but does not provide a strong statement about why this is the best option. | (6-7.5 points) The student includes a final recommendation but it is very poorly written or supported. | (<6 points) The student does not have a final recommend. |
the highest, but if not—the student should include a convincing argument why you are supporting a different option. Note: This should be a strong statement that convinces the reader that this is the best option.

<table>
<thead>
<tr>
<th>Tables and Figures:</th>
<th>(4.5-5 points) The student includes tables or charts to explain the problem and/or some of the policy options.</th>
<th>(3.5-4.5 points) The student includes some tables or charts, but does not provide put other data better displayed graphically in table/chart format.</th>
<th>(3-3.5 points) The student included some tables or charts, but hard to understand.</th>
<th>(&lt;3 points) The student did not include tables/charts/figures even though the information would be better displayed graphically.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Writing. Well written, organized, and convincing paper. (20 points)</td>
<td>(18-20 points) The paper is well-written and organized. It does not include spelling or grammatical mistakes. It follows guidelines for clear communications (eg, written in the active tense, short, non-compound sentences).</td>
<td>(15-18 points) The paper is generally well-written and organized, without spelling or grammatical mistakes. However, information may not always be presented clearly. Student may write in passive tense, or use too many compound sentences.</td>
<td>(12-15 points) Paper is not well written, and includes significant number of grammatical or spelling mistakes. It does not cover some the required sections and/or information is hard to understand.</td>
<td>(&lt;12 points) Very poorly written paper, does not include a lot of the required sections, hard to understand, lots of spelling and grammatical mistakes.</td>
</tr>
</tbody>
</table>

- Policy Advocacy Strategy and Stakeholders Analysis
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Fully Met</th>
<th>Partially Met</th>
<th>Inadequately met</th>
<th>Not met</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview of the Problem and Your Policy Solution</strong></td>
<td>Provides enough background information on the problem and the proposed policy solution to address the problem. This is essentially a short summary of the key points you included in your first paper. Shouldn’t be more than a few paragraphs. (10 points)</td>
<td>Explains the policy solution in enough detail so the reader understands your proposed policy and the data that supports it.</td>
<td>Information provided is not sufficient for reader to understand the problem or potential policy option.</td>
<td>Did not provide an introduction that helps the reader understand what problem you are trying to address or your policy position</td>
</tr>
<tr>
<td><strong>Long-term and Short-term Legislative/Policy Goals.</strong></td>
<td>Explains the long-term and short-term legislative/policy goals. Long-term goals can include your ultimate goals, but it can also include what you are seeking through the proposed legislation or regulation. Short-term goals can be an incremental approach towards your longer term goals—or what you are willing to compromise on. Essentially, you need to think about what you will do if you can’t get everything you want. (5 points)</td>
<td>Provides an overview of long and short-term policy goals but doesn’t address potential compromises if can’t get policymakers to adopt recommended policy.</td>
<td>Provides some information on long and short-term policy goals but hard to understand, or not directly related to overall policy.</td>
<td>Doesn’t address long-term or short-term policy goals.</td>
</tr>
<tr>
<td><strong>Key Messages (Framing):</strong></td>
<td>Identifies 2-3 of your strongest talking points in support of the policy position. Also, includes the</td>
<td>Explains your strongest arguments and/or opponents arguments, but doesn’t fully address the proponents main arguments in</td>
<td>Does not adequately address the proponents or opponents key message.</td>
<td>Doesn’t provide any information about key messages or opponents key message.</td>
</tr>
<tr>
<td>Stakeholder Analysis:</td>
<td>Coalition Strategy:</td>
<td></td>
<td></td>
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<tr>
<td>Provides examples of both key supporters and opponents of your proposed policies. Describes whether the group is likely to support or oppose (or be neutral), the level of their support/opposition, reasons for their position, how powerful the group is, what resources they could bring to support or oppose the policy, and how you can convince them to support (or not oppose) the policy. (15 points)</td>
<td>Including information on whether you would work with a preexisting (or develop) a coalition to work on the issue, and why. If so, which groups you would involve, which group (if any) would take a leadership role, whether this is an ongoing or ad hoc coalition. If not, why not (10 points)</td>
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</tr>
<tr>
<td>(14-15 points) Identifies key stakeholders in support of and opposition to the proposed policy. (Follows stakeholder hints listed in Sakai). Explains their position (support/opposition), the resources they can bring to help lobby for/against the policy, and realistically assesses the power of the groups whether they are likely to get involved. For opponents (or those more neutral), explains whether there is any way to neutralize their opposition and/or get them to support.</td>
<td>(9-10 points) Student explains whether the advocacy strategy will include a Coalition (or if not, why not), and the role the Coalition members would play. The paper identifies which groups to include in Coalition work, potential leadership of the Coalition, and whether there is already an existing Coalition.</td>
<td></td>
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</tr>
<tr>
<td>(11-14 points) Identifies key stakeholders, but did not adequately explain their level of power, resources they bring to the table, or likelihood of getting involved.</td>
<td>(7.5-9 points) The student describes the Coalition effort, but doesn’t fully address all the prompts (eg, which groups would be involved, who would assume leadership, whether this would be an ad-hoc or ongoing Coalition)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>(9-11 points) Does not identify key stakeholders. Does not fully address the resources stakeholders can use to influence the policy outcome or other key elements of the stakeholders analysis grid (or shows little thought in responses).</td>
<td>(6-7.5 points) The student doesn’t fully address the role and structure of the Coalition (or if no Coalition, why not).</td>
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</tr>
<tr>
<td>(&lt;9 points) Information not provided at all, or students identified inappropriate stakeholders (which shows they did not review materials on Sakai or discussed in class). Does not include key elements of analysis grid.</td>
<td>(&lt;6 points) No information is provided about Coalition strategy.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Legislative/regulatory strategy:</strong></td>
<td><strong>Description of your legislative (or regulatory) strategy including key sponsors, whether the bill will be partisan, committee composition, communications strategy with legislators, etc. (15 points)</strong></td>
<td><strong>(14-15 points)</strong></td>
<td><strong>(11-14 points)</strong></td>
<td><strong>(9-11 points)</strong></td>
</tr>
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<td>---</td>
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</tr>
<tr>
<td><strong>Coalition that could assume responsibility for this work (and if so, whether it needs to be expanded), whether this will be an ad hoc or ongoing coalition.</strong></td>
<td>The student identifies potential legislative sponsors (and explains why they were identified), explains whether the advocacy strategy will seek to launch a partisan or bi-partisan effort, and the communications strategy with legislators.) If known, the student should also identify committee where bill is likely to be sent.</td>
<td>The student identifies potential sponsors, but doesn’t fully articulate communications strategy, and/or whether the advocacy strategy will be partisan or bipartisan.</td>
<td>The student doesn’t identify potential bill sponsors (or type of sponsor) and/or describe the communication strategy in sufficient detail.</td>
<td>No information provided about the legislative/regulatory strategy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Role of the media and messaging (if any).</strong></th>
<th><strong>Explanation of how you will engage the media, or if you do not plan to engage the media, why you have chosen not to. (10 points)</strong></th>
<th><strong>(9-10 points)</strong></th>
<th><strong>(7.5-9 points)</strong></th>
<th><strong>(6-7.5 points)</strong></th>
<th><strong>(&lt;6 points)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Describes whether the advocacy group should reach out to the media and/or how the group should respond if the media reaches out to them. What is the goal of involving the media? If there is no affirmative strategy, explains why not.</strong></td>
<td>Provides some information on the media strategy, but doesn’t fully explain why to use (or not use) the media. Doesn’t fully explain the purpose of using the media (or why the advocacy group will not affirmatively try to engage the media).</td>
<td>Does not fully address the role of the media in the advocacy strategy (or if none, why not).</td>
<td>Does not include any information about media strategy.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Grassroots mobilization (if any):</strong></th>
<th><strong>Explanation of whether, and how you will involve the grassroots. Includes the strategy for engaging people who are likely to be impacted by the policy. (10 points)</strong></th>
<th><strong>(9-10 points)</strong></th>
<th><strong>(7.5-9 points)</strong></th>
<th><strong>(6-7.5 points)</strong></th>
<th><strong>(&lt;6 points)</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Explains whether the advocacy effort will include a grassroots mobilization effort and what types of people will be engaged (eg, health professionals, community members, faith leaders, etc.) or includes information about what role the grassroots can play (or if not, why)</strong></td>
<td>Doesn’t fully address this issue of whether to involve the grassroots, the role they would play, or how they would be identified and engaged.</td>
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</table>
Advocacy Fact Sheet

**Criteria**

<table>
<thead>
<tr>
<th>Fully Met</th>
<th>Partially Met</th>
<th>Inadequately met</th>
<th>Not met</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Key Message on Top</strong></td>
<td>(9-10 points)</td>
<td>(7.5-9 points)</td>
<td>(6-7.5 points)</td>
</tr>
<tr>
<td>Tell legislators the position they want the legislators to take on the bill. You should ask them to support or oppose a particular piece of legislation (eg, HB#XXX, or SB#XXX)</td>
<td>Clearly tells legislators what you want them to do (support/oppose/amend), the bill number, and a short title of the bill (so policy makers know what the bill does).</td>
<td>Covered some, but not all of the key elements.</td>
<td>Does not tell legislators what you want them to do or what bill you are referencing.</td>
</tr>
<tr>
<td><strong>Key messages</strong></td>
<td>(37-40 points)</td>
<td>(30-37 points)</td>
<td>(24-30 points)</td>
</tr>
<tr>
<td>Focus on a few key messages to explain why the legislators should support, oppose, or amend the legislation. The fact sheet should both describe the problem (if seeking affirmative legislation) or why the proposed legislation is bad (if seeking to oppose the legislation). The points should be compelling, and should be consistent with the position the stakeholder group would likely take. It should be understandable to a lay person (eg, limited jargon or acronyms, technical language explained, etc.).</td>
<td>Focuses on 2-3 key points. The messages are clear and easy to understand and supports the position you are taking on the legislation. The key points should be compelling. Other information provided should support the key points. The message should not be cluttered with jargon (eg, acronyms that aren’t explained, etc.)</td>
<td>Provides some messages, but they are not clear or are trying to cover too much in the fact sheet. May include some jargon that is not well explained.</td>
<td>Key messages are not clear or convincing. May lack information needed to support position.</td>
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<tr>
<td><strong>Fact Sheet Flow</strong>&lt;br&gt;Fact sheet should use headings to highlight important points. Only key points should be highlighted. (Don’t highlight everything—the point is to draw the readers’ eyes to the most important points. The fact sheet should be attractive, well laid out, easy to read (generally 12-point type, lots of white space, grammatically correct). Good use of graphics or human interest story is helpful. Ideally, one single-sided page (no more than 1 page, double sided).&lt;br&gt;(40 points)</td>
<td>The fact sheet is well organized, and attractive. It is easy to read with white space. The key points are highlighted (but only key messages, not everything). Charts, figures or pictures (if any) support your argument. Fact sheets optimally should be limited to one single-sided page (and should never be more than 1 page, double sided).&lt;br&gt;(37-40 points)</td>
<td>May include key messages, but some may be lost because of competing visuals, highlighting or messages. Fact sheet may appear a little cluttered.&lt;br&gt;(30-37 points)</td>
<td>Too many competing messages. The readers eyes are drawn to too many items (eg, too many sentences, words are highlighted, too many graphics, hard to know where to focus attention).&lt;br&gt;(24-30 points)</td>
</tr>
<tr>
<td><strong>Appropriate citations/references</strong>&lt;br&gt;Includes several key references that support</td>
<td>Includes some references, but</td>
<td>Has references, but not linked to</td>
<td>(&lt;3 points)</td>
</tr>
</tbody>
</table>

| 4.5-5 points | 3.5-4.5 points | 3-3.5 points | <3 points |
Fact sheet should have a few references, unless there are no useful references. (5 points)

the student’s advocacy position. References must be complete enough so that the reader can track down the data if they want to read it.

may not be sufficient to enable reader to find the reference if they want to follow up.

anything in the fact sheet.

Doesn’t include any references.

Name and contact information
Fact sheet should have the name, organization, and contact information at the bottom of the fact sheet. You can include made-up contact information (eg, it doesn’t have to be your personal phone number or email, but you need to include something so legislators could contact you if they have questions). (5 points)

(4.5-5 points) Student provides name, organization you are representing, and contact information (phone, email) for the policy maker to follow up if s/he has more questions. (Note: for purposes of this assignment, the students can include a fake phone number or email address).

(3.5-4.5 points) The student provides incomplete contact information.

(3-3.5 points) The student only has name, but no way to contact them.

(<3 points) No contact information is provided.

- Legislative Presentation

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
<td>(9-10 points). Tells legislators who you are and the group you represent. Thanks the chair and committee for allowing you to present. Tells legislators what you want them to do.</td>
<td>(7.5-9 points) States name, but doesn’t include some of the other key elements (thank you, organization, position).</td>
<td>(6-7.5 points) Includes something (eg, name, position), but no thank you, no organizational representation.</td>
<td>(&lt;6 points) No introduction at all.</td>
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<tr>
<td><strong>Key messages</strong></td>
<td>(27.5-30 points) Focuses on 2-3 key points. The messages are clear and easy to understand and supports the position you are taking on the legislation. The key points should be compelling.</td>
<td>(22-27.5 points) Provides some messages, but they are not clear or you try to cover too much in the fact sheet. May include some jargon that is not well explained.</td>
<td>(18-22 points) Key messages are not clear or convincing or are not consistent with the point you are trying to make.</td>
<td>(&lt;18 points) Points are not understandable (eg, so confusing that the policy makers won’t understand any point you are trying to make).</td>
</tr>
</tbody>
</table>
amending. The points should be compelling, and should be consistent with the position the stakeholder group would likely take. (30 points)

| Presentation | (23-25 points) Student speaks slowly and clearly. Has good eye contact with the legislators. Looks around at all the legislators. | (19-23 points) Student presentation is good, but spends too much time looking down at paper. | (<15-19 points) Student reads from the paper. | (<15 points) Student mumbles, or talks too quietly to be heard. Student reads from the paper |
| Presentation timing | (9-10 points) Stays within the time limit. | (7.5-9 points) Goes over the time limit (only slightly). | (<6-7.5 points) Goes 1-2 minutes over the time limit. | (<6 points) Doesn’t stop, even when student alerted to time limits. |
| Question and Answers | (18.5-20 points) Does a nice job responding the questions from legislators. Answers concisely and accurately, and provides convincing arguments in support of their position. Admits if don’t know the answer (but agree to find the answer and get back to the legislator). | (15-18 points) Can’t answer question or provides inaccurate information. Does not agree to follow-up with answer if they do not know the answer when first asked. | (<12 points) Does a poor job responding to questions. Answers are not responsive to questions asked, and are not understandable. |
| Conclusion | (4.5-5 points) Thanks the legislators, reiterates the position the legislators should take, and highlights why they should take that position. | (3.5-4.5 points) Provides a quick thank you but doesn’t provide an adequate wrap-up. | (3-3.5 points) Says thank you but nothing else. | (<3 points) Forgets to thank the legislator and ask them to support their position. |
Guest Speakers Bios

Marilyn Avila. Marilyn Avila currently serves as Policy Advisor to the Office of the Speaker Pro Tempore in the North Carolina House of Representatives. She served for five terms in the North Carolina House of Representatives (2007-2016) representing Wake County. She had numerous leadership positions while in the House, serving as chair of the Appropriations Subcommittee on Health and Human Services and of the Joint Committee on Health and Human Services Oversight. She was also vice chair of the Health Policy Committee and of the Science and Technology Committee. Prior to that she worked as the Events Coordinator and Director of Administration for the John Locke Foundation. Former Representative Avila received numerous awards while serving in the NC General Assembly, including Legislator of the Year from the Aids Drug Assistance Program (ADAP) Advisory Association, Legislator of the Year from the Arc of North Carolina, and William Purcell award for Excellence in Health Policy from the NC Public Health Association.

Lanier Cansler, CPA. Lanier Cansler is a former Republican member of the North Carolina House of Representatives where he served for six years (1995-2001). During his tenure in the North Carolina House of Representatives, he served as co-chair of the Appropriations Committee on Health and Human Services, co-chair of the Joint House/Senate Legislative Oversight Committee on Healthcare. He also served as a member of the Committee on Mental Health and Public Health. He also served as Deputy Secretary (2001-2005) and later Secretary of the North Carolina Department of Health and Human Services (2009-2012). Lanier is currently the President of Cansler Collaborative Resources, Inc. a consulting firm with an emphasis on health and health care services and governmental operations.

Leah Devlin, DDS, MPH. Leah Devlin began her public health career working for the Wake County Health Department, where she served as Director for 10 years. She served as the State Health Director in the North Carolina Department of Health and Human Services from 2001-2009. She is now a professor in the Department of Health Policy and Management at the Gillings School of Global Public Health. Leah serves on the board of the Robert Wood Johnson Foundation and the Centers for Disease Control and Prevention Foundation Board. She is a past president of the Association of State and Territorial Health Directors. Leah also serves as a consultant for the Research Triangle Institute, International a global think tank working on health, energy, agriculture, and workforce development.

Rachel Dolin, PhD. Rachel Dolin is a Democratic Professional Staff for the Committee on Ways and Means, Subcommittee on Health, US House of Representatives. She completed her Ph.D. in Health Policy and Management in May 2017 at the Gillings School of Global Public Health at the University of North Carolina at Chapel Hill, followed by a one-year David Winston Health Policy Fellowship. Prior to her doctoral work, Rachel worked as a researcher for L&M Policy Research, LLC, in Washington, D.C., where she contributed to numerous research contracts for the Centers for Medicare & Medicaid Services, including the Center for Medicare & Medicaid Innovation, as well as other federal, state, and private-sector clients.

Elizabeth Edwards, JD. Elizabeth Edwards is a Senior Attorney in the National Health Law Program’s North Carolina offices. In addition to working with the National Health Law Program’s litigation team to develop innovative legal theories to advance the health rights of low income and underserved individuals, Elizabeth’s work includes policy advocacy and legal education. Elizabeth joined the National Health Law Program after five years with Disability Rights North Carolina, where she worked her way up to lead attorney. At Disability Rights NC, Elizabeth used the Medicaid Act, the Americans with Disabilities Act, and
public policy to ensure equal access and community integration for individuals and groups, with a special
focus on ending the long-standing institutional bias toward placement of people with disabilities in large,
isolating adult care homes. She also designed and implemented a statewide project regarding voting for
people with disabilities, including outreach, training, and organizing accessibility surveys of polling places
in all 100 counties. A graduate of the law school at UNC-Chapel Hill, Elizabeth obtained her bachelor’s in
environmental science and policy from Duke University.

**Rick Glazier, JD.** Rick is the executive director of the NC Justice Center. He joined the Justice Center in the
summer of 2015, following his resignation from the NC General Assembly after 13 years representing
Cumberland County in the NC House of Representatives. As a Representative, Rick served on the House
Judiciary, Education. Ethics, and Appropriations committees, among others. He is a former chair of the
Cumberland County School Board.

**Morgan Wittman Gramann** Morgan Wittman Gramann is the Executive Director of the North Carolina
Alliance for Health, an independent, statewide coalition convening and mobilizing partners to advance
equitable health policies that promote wellness and prevent obesity and tobacco use. Passionate about
community health and policy change, Morgan has been an advocate for public health since 2006. She got
her start in the tobacco use prevention movement, working with Youth Empowered Solutions, The
Campaign for Tobacco-Free Kids, helloCHANGE, IGNITE, and Colleges Against Cancer. In 2008, she was
named International Youth Advocate of the Year by the Campaign for Tobacco-Free Kids for her work in
global teen tobacco use prevention. Since joining NCAH, Morgan has had the pleasure of expanding her
health policy work to the area of obesity prevention and specifically healthy food access. Morgan earned
her JD from the University of North Carolina at Chapel Hill School of Law and her BA in Anthropology from
The American University in Washington, DC, where she was a Division I athlete.

**Rose Hoban, BSN, MJ, MPH** is the founder, editor, and reporter of NC Health News, which since launching
in 2012, has published more than 2000 stories. Prior to launching NC Health News, she served as the
health reporter for more than six years with North Carolina Public Radio (WUNC) where she covered
health care, state health policy, science, and research with a focus on public health issues. She began her
career as a practicing nurse, and has a joint master’s degree from UC Berkeley in journalism and public
health. Rose has received numerous regional and national awards, including broadcast journalism’s
highest award—the Columbia-DuPont and a Gracie Award for her reporting on unsafe abortions in
southern Africa.

**Harry Kaplan, JD.** Harry is a Senior Advisor with McGuireWoods Consulting state government relations
group and is a partner with McGuireWoods LLP. Since beginning his government relations and legal
career in 1988, Harry has been consistently recognized as one of the most influential lobbyists in Raleigh.
He represents public and private companies, as well as associations and nonprofit organizations on health
care and health insurance, pharmacy, education, and other issues. Prior to joining McGuireWoods, Harry
ran his own legal and lobbying practice for more than a decade and also served as director of government
relations and counsel for the North Carolina Region of Kaiser Permanente.

**Gene Matthews, JD** is a senior investigator at the NC Institute for Public Health, where he conducts legal
research and provides technical assistance to public health practitioners on legal topics. He is also the
Director of the Southeastern Regional Center of the Network for Public Health Law, which provides legal
assistance on a variety of public health topics, enabling practitioners, lawyers and policymakers to apply
the law to pressing public health issues. Gene received both his BA in history and mathematics and his JD from UNC.

Noel Mazade, PhD. Noel is Professor of the Practice in the UNC School of Social Work and Adjunct Professor in the Department of Health Policy and Management in the Gillings School of Global Public Health. Prior to coming to UNC, he served as Executive Director of the Delaware Dispute Center, the founding Executive Director of the National Association of State Mental Health Program Directors Research Institute, and Program Director for the Staff College, National Institute of Mental Health. Noel has worked in various capacities around mental health issues in Delaware, Maryland, Michigan, North Carolina, and Virginia. In addition to his behavioral health-related academic and professional activities, Noel is an experienced mediator and conflict resolution educator with extensive professional practice in superior court, family mediation, academia, and designing alternative dispute resolution systems. He received a master’s degree in social work for the University of Michigan, and a master’s and PhD from the University of Pittsburgh.

Deborah Ross, JD. Deborah was a member of the North Carolina House of Representatives from 2002-2013. In 2007, she was elected to serve as one of the House Democratic Whips. Prior to being elected to the NC House of Representatives, Deborah served as state Director for the NC ACLU. Deborah left the General Assembly in 2013 to serve as legal counsel for Go Triangle. In 2016, she unsuccessfully ran for US Senate against Richard Burr. She received her law degree from UNC in 1990. Deborah is currently Of Counsel with Fox Rothschild in Raleigh.

Rebecca Slifkin, PhD, MHA is a Professor and Associate Chair in the Department of Health Policy and Management (HPM). Prior to joining HPM she directed the Office of Planning, Analysis and Evaluation within the Health Resources and Services Administration (HRSA), U.S. Department of Health and Human Services. She served as HRSA’s policy lead on Affordable Care Act implementation and was also responsible for performance measurement activities, GAO engagements, intergovernmental affairs, trans-HRSA research and evaluation, agency-wide policy analysis, and liaison with other HHS operating divisions. From 2000-2010 Dr. Slifkin directed the North Carolina Rural Health Research & Policy Analysis Center at the Cecil G. Sheps Center for Health Services Research, University of North Carolina at Chapel Hill. She has substantial experience leading quick turnaround projects aimed at a policy audience, and she has consulted with agency and congressional staff numerous times on the potential impact of legislative policies. From 2000-2010, Dr. Slifkin was a member of the Rural Policy Research Institute Rural Health Panel, a national panel committed to producing objective analyses of the impacts of public policy on rural people and places.

Willona Stallings, MPH, is the Director of NC Get Covered, the statewide coalition of ACA navigators, certified application counselors, insurance agents and brokers, insurers and other interested organizations working to help North Carolinians obtain health insurance coverage through the Marketplace. Willona has more than 15 years of experience in program development and management, stakeholder engagement, and data management. Before joining Care Share, Willona served as the founding director of the NC Council of Churches’ health initiative, Partners in Health and Wholeness—helping to promote health as a faith issue.

Betsy Vetter. Betsy is the Field Grassroots Director for the American Heart Association. In this role she oversees the AHA’s grassroots managers across the country. She previously served as the Regional Vice President of Government Relations at the American Heart Association/American Stroke Association Mid-
Atlantic Affiliate. Betsy has worked in government relations and grassroots advocacy for the American Heart Association for more than 16 years. During her tenure, Betsy helped advocate for numerous state and local policies including NC’s smoke-free restaurant and bar law, CPR Instruction required for High School Graduation, and Pulse Oximetry newborn screen. In addition she developed a gold standard statewide advocacy committee and a strong network of engaged advocates. She has served in leadership on several statewide coalitions including the NC Alliance for Health and Care4Carolina. Betsy has received both state and national recognition for her work in grassroots organizing, volunteer management and policy achievement.

Tom Vitaglione, MPH has been a Senior Fellow with NC Child since 2000, where he has led that agency’s child health and safety advocacy efforts. This has followed a career with the NC Division of Public Health, where he was head of child health for more than a decade. He served as co-chair of the Child Fatality Task Force, a legislative study commission that studies the causes of children’s deaths and makes recommendations to prevent future deaths. In this capacity, Tom has been involved with most of the child safety legislation adopted in the past decade. Tom has a Masters in Public Health from Columbia University, and met his wife when they were Peace Corps volunteers in Malawi in the 1960s. He and his wife, Eve, have continued to visit Malawi, where they assist with a village-based orphan care program.