

GERIATRIC SOCIAL WORK INITIATIVE

Developing Policy Leaders: Lessons to Share
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It is a pleasure to be here today to talk about a topic of great interest to me—policy. Having been in Washington, DC for more than 25 years, I have been fortunate to observe first hand the policy process at the federal level, a process that I assure you is nothing like what we learned in high school civics.



Early Lessons Learned

- Legislation is the end of the policy process
- How an issue is framed shapes the answer

One of my early policy lessons in Washington, DC, came from Jack Cornman, a former Executive Director of The Gerontological Society of America. Jack, a savvy policy expert with years of experience on Capitol Hill, taught me early on that legislation was the *END* of the policy process. At that point in the policy process, the best opportunity for influence was pretty much over. It was more important, he continually reminded me, to be part of the initial discussions of an idea, when the issue gets framed. The way a question is asked is critical because it shapes the answer. What this means is that to be part of these early formative discussions, it is essential to develop ongoing relationships with those in positions of influence. Building such relationships should be a natural for social workers. It is not, however, natural for most faculty to venture beyond their familiar and comfortable academic environment into the world of policy. Creating leaders who can effectively bridge the academic and policy worlds is what I want to focus on today, using as an example the Hartford Faculty Scholars Program in Geriatric Social Work.



The Hartford Faculty Scholars Program

- A faculty leadership program in geriatric social work
- Its goal is to ultimately improve the health and well being of older adults.

The Hartford Faculty Scholars Program, now in its 7th year, is a faculty leadership program that identifies outstanding social work faculty committed to teaching, research, and leadership in the area of geriatric and long-term care. In 1999, when The Gerontological Society of America was first approached by the John A. Hartford Foundation to administer the Faculty Scholars Program, I personally was thrilled by the possibility of being involved with a program that took me back to my social work roots.

In my initial discussions with Barbara Berkman, the National Director and conceptualizer of the Program, I indicated to her my interest in taking the lead for the policy-related aspects of the program. She agreed and that was the beginning of a great partnership.



HFS Mission

Improve health care for older adults by:

- Increasing faculty capacity of schools of SW to train competent practitioners in gerontology
- Selecting outstanding social work faculty with leadership potential
- Enhancing Scholars' leadership capabilities through every dimension of the Program

The overarching mission of the HFS program is to improve health care for older adults and is accomplished by:

- Increasing the faculty capacity of schools of social work to train competent practitioners in gerontology
- Selecting outstanding social work faculty with leadership potential
- Enhancing the Scholars' leadership capabilities in various ways through every dimension of the program--institutes and workshops, long distance research mentoring, institutionally-based sponsorship, and communication activities.

We use many approaches to developing leadership, but today I am going to focus on the Policy Leadership Institute, which I direct.

What is leadership? While definitions of leadership abound, there are two in particular that I would like to mention:



What Is Leadership?

- *Leaders establish the culture.*

C. Girard-diCarlo (1999). The importance of leadership, Healthcare Executive, 14(6), 48-49.

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What is Leadership?

- *Leadership is the process of getting everyone to the places they need to go.*

Leadership has also been described as the process of getting everyone to the places they need to go.

Each Faculty Scholar proposes and implements during their two years in the program a significant geriatric research project that addresses the effectiveness of social work practice in enhancing the social, physical and psychological well being of older adults and their caregivers. The Scholars are continually challenged to see the broader context of their research projects, as well as the policy implications of their work.



HFS Policy Leadership Institute

GOAL: To inspire Scholars to be more involved in making SW research known to, understood by, and used by those who affect public policy

During the second year of their program, the Hartford Faculty Scholars attend a three-day Policy Leadership Institute in Washington, DC. The goal of the Institute is to demystify the policy world and inspire the Scholars to become more involved in making social work research known to, understood by, and used by those who affect public policy. Throughout the Institute, the Scholars learn how to better understand and appreciate the depth and complexities of the policy world.

Six (6) Key Elements of the Institute



Key Elements of Institute

#1

Strengthen Scholar's understanding of connections between research, academic, practice, and policy.

1. Strengthen Scholars' understanding of the connections between the research, academic, practice, and policy arenas.

Since the Scholars are typically more familiar and comfortable within the academic environment, the Institute makes them stretch and go beyond their usual tendencies. One of the presenters we have used for the Institute is Steve McConnell, VP for Advocacy and Public Policy at the Alzheimer's Association, who started out as an academic at the University of Southern California and then spent more than a decade working for Congress. His presentation shows the Scholars how to integrate public policy advocacy into their very full academic lives. He powerfully illustrates the interdependence that should exist between people who conduct research and organizations such as Congress who use (or should use) research to develop policy, and how the Scholars are in a position to link the two.



Key Elements of Institute

#2

Learn about Congress, its players, and its “culture.”

2. Scholars learn about Congress, its players, and its “culture.”

Before coming to Washington, DC, Scholars are asked to find out what is happening in Congress related to their area of research; identify some of the “hot topics” in aging; and find out more about the representatives (Congresspersons and Senators), with whom they will be meeting--which committees they serve on, any personal information (e.g., schools they attended) that might lead to a “connection.” Scholars set up appointments to meet with their representatives while they are in Washington.

Their Washington experience begins with an overview of what is currently happening in Congress, who the key players are, and Washington politics. Bob Blancato, an aging policy expert with more than 25 years in public service both in Congress and the Executive Branch and who served as Executive Director of the 1995 WHCoA provides this always insightful overview, which helps set the stage for the rest of the Institute.

From Judy Schneider, a Specialist on the Congress at Congressional Research Service, the Scholars learn about how Congress really works--the legislative process and more. This is a very informative insider’s view of Congress from the person who is responsible for orienting *all* new members of Congress.



Key Elements of Institute

3

Learn to develop and sustain relationships with legislative staff.

3. Learn to develop and sustain relationships with legislative staff.

To learn more about the “players” in the policy arena, Scholars attend a session that helps them gain insight into advocacy from both the perspective of a lobbyist and a Hill staffer. We have been fortunate to have high level Washington people for this session, including Ted Totman, the Deputy Staff Director of the Senate Finance Committee, and Jo Reed, a trained social worker who has held a senior legislative position with AARP for more than 25 years. The session is intended to build confidence. The major take away messages for the Scholars are: (1) do not be intimidated; (2) as social workers, your strength is your ability to connect with people; and (3) you, as a researcher, have valuable expertise and experience to offer.



Key Elements of Institute

#4

Learn to effectively frame one's message to resonate with the needs and values of the intended audience.

4. Learn how to effectively frame one's message so that it resonates with the needs and values of the intended audience.

The Scholars are challenged to shed their usual academic style for one in which their work is framed within the context of policy, in a succinct, jargon-free manner. They learn to tailor their message and communication style to a variety of situations and audiences; short meetings with funders, elected officials, Hill staff, or someone at a cocktail party. Tom Goodwin, founder and principal of Step One Communications, who has 27 years' experience in health care strategic communications and public affairs, leads the Scholars through this messaging process.

As part of their experience, we also select one of the Scholars to develop and present mock testimony on his/her research to the group of Scholars. The testimony is followed by questions from the "Senators (Scholars)," to which the Scholar must respond. Staff, the expert communications person, and the Scholars then offer observations and provide feedback on effectiveness and areas for improvement. These sessions are a great way to learn how to "deliver" the message.



Key elements of Institute

#5

Learn to build support for issues amid in an environment of competing interests and demands.

5. Learn how to build support for their issues amid an environment of competing interests and demands.

Through the various sessions, the Scholars hear from Congressional staffers and lobbyists about the many competing interests of various constituencies. What they learn is to find the intersection of their interests with those of the staffer or member of Congress—the common ground. This is the key to connecting.



Key elements of Institute

#6

Learn to effectively use stories, images, and drama to convey the messages.

6. Learn how to effectively use stories, images, and drama to convey their messages.

As I mentioned earlier, leadership is the process of getting everyone to the place they need to go. Leaders rely on stories, images and drama to help communicate their messages and to lead others in new directions. During the Institute, Scholars learn how to communicate their messages in ways that resonate with a given audience. Social workers typically have a ready store of personal stories to draw upon. Bentley Lipscomb, a social worker and a gifted story teller, talks to the Scholars about his work at all policy levels; previously as Staff Director for the Senate Aging Committee, then Director of the Florida State Unit on Aging, and currently as the State AARP Director. This serves to use a personal, compelling story to inspire and propel the Scholars to use the findings of their research to make a difference in the quality of life of older persons and their families.

On the final day of the Institute, the Scholars practice what they have learned. They visit their Congressional representatives and begin the process of building valuable relationships.

The Scholars leave the Institute with a better understanding of the political environment, why it is important for them, as leaders and researchers, to be engaged in the policy process, and armed with the confidence that they can make a difference.

Scholars Making a Difference

So, does this Institute make a difference?

I would like to conclude by sharing with you some success “stories” of how our Scholars are making a difference at the state, local, federal, and even international level. These are only a few of the stories I could share.

Michelle Putnam (Washington University), with funding from NIA, held a conference on aging and disability. This meeting attracted national and local scholars, practice professionals, public officials, and policy makers to discuss national and local trends and issues related to building partnerships across aging and disability service networks. An issue of Public Policy and Aging Report, published by GSA, was devoted to issues raised at the conference and a book based on the conference also is underway. Based on the response to the conference, Dr. Putnam was asked to present her Hartford research at the Centers for Medicare and Medicaid Service’s Real Choices grantee meeting in Baltimore, which was attended by more than 700 state-based professionals involved in Medicaid’s HCBS waiver programs.

Jong Won Min (San Diego State University) was recently invited by the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality (AHRQ) to attend an expert meeting in Washington, DC to discuss health care issues for older adults with multiple conditions.

Karen Lincoln (University of Washington) was named Chair of the Seattle Mayor’s Council on African American Elders, which puts her in close contact with the Mayor and members of the Seattle City Council, as well as representatives from city and state agencies. Karen has also led in the organization of a community forum on needs of older women co-sponsored by the Alzheimer’s Association, the Department of Public Health, Aging and Disability services, as well as a host of other Seattle local organizations.

Kathy Black is a Research Associate in the newly established University of South Florida Center for Research in Healthcare Systems and Policies. High on the priority list for study is Kathy’s work on reduction of health care disparity among elderly populations which can result in underserved populations. Her research is influencing state policy makers in shaping health care delivery programs.

Charles Emlet (University of Washington) was asked by the UN Institute on Aging and the Help the Aged Organization of London, England to be on a panel of experts from around the world at the UN Institute on Aging held in Malta in November 2005. This panel developed a platform statement regarding HIV/AIDS on older adults that will be submitted to the Commonwealth Heads of Government.

The work by one of our newest Scholars, **Karen Bullock** (University of Connecticut), on end-of-life choices among African Americans and its implications for care recently appeared in the Los Angeles Times.



Scholars Making A Difference

- Helping establish a culture whereby SW researchers see policy as the natural extension of their work.

In conclusion, our Scholars are establishing a culture whereby SW researchers see policy as the natural extension of their work.



Scholars Making A Difference

- Involved in building the leadership skills of others.

They also are helping build the skills of future generations of leaders as they use their experience and the Institute materials in the classroom with their students. This program is but one example of how social work faculty are learning to successfully bridge the worlds of academia and policy (PAUSE) and to ultimately make a difference.

Thank you.

Presented by Linda Krogh Harootyan, Deputy Director , The Gerontological Society of America, at the 2006 CSWE Annual Program Meeting/Gero-Ed Forum in Chicago, IL (February 17, 2006).