
Supplementary Materials for PAF 101

SUPA Teachers

This manual was prepared for a PIG class as a NYC high school that is like most of the high schools in the city. The material was developed by my undergraduate interns who work at the high school. SUPA teachers are welcome to search through it and use anything that appears appropriate.

Compiled by Lisa M. Mueller

The materials in this manual were edited and compiled by Lisa Mueller. The content is based on William D. Coplin and Michael O'Leary's book, Public Policy Skills 3rd Edition. In addition, this was prepared based on the work of eight interns who taught *The Introduction to Public Policy* with Devon Bartlett, a Social Studies teacher, at the High School for Leadership and Public Service in New York City for two semesters. These individuals are: Brian Angel, Tiara Jewell, Christopher Kidder, Lisa Mueller, Hillary Strachen, Dana Twyman, Thomas Webster, and Bradley White.

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How to Use this Manual

This manual provides supplemental materials corresponding to the first nine chapters of Public Policy Skills, 3rd Edition. For each chapter there may be one or any combination of the following materials:

- A New York City Case Study which was developed to illustrate each step in the process of understanding societal problems and creating public policy solutions
- Templates for handouts, worksheets, or overheads.

Pages in this manual which have a lower case s in parentheses “(s)” following the title of the page are ready to be copied as handouts, worksheets, or made into overheads. The “(s)” means they are ready templates ready for student use. Pages which do not have the “(s)” are for you. They include instructions for how to use the templates and the New York City Case Studies. You could use the New York City Case Study to create other overheads or handouts for your class but they are not currently in a student-friendly format.

There are also some lesson plans included in this manual for helpful class exercises that are not related to the text. For the beginning of the class, there is a lesson plan for having your students create social contracts in their small groups. At the end of the manual, you will find two sections of both Microsoft Excel and PowerPoint Tutorial, which include 4 lesson plans and several handouts for students as well.

Finally, a glossary has been included in this manual. For each chapter, there are several terms used regularly in the textbook. These are terms that should be used in any discussion of public policy.

Creating a Social Contract

The following materials are provided here for Chapter 1:

Lesson Plan: Social Contract

Sample Social Contract

Social Contract for Public Policy Groups (s)

Creating a social contract is a very good way for students to learn how to work with others in a professional manner. The Lesson Plan and Sample Social Contract will help you facilitate the process so that student groups can create their own contract together.

Lesson Plan: Social Contract

Materials

Social Contract for Public Policy Groups (s)

Agenda

1. Put students into their research groups
2. Explain that it is very important students work together very well during this project. Group dynamic is going to be a very important part of the process. To help students work effectively with their group members, they are going to have a social contract, which they will all adhere to.
3. Give your students the Social Contract handout.
4. Spend the rest of the class having the students work in their groups. You should facilitate the social contract process by spending time in each of the groups. Have students take notes on their handouts and then write up one final copy of their group social contract.
5. Make sure students understand that the final contract will be signed by every group member. If only one group member does not want to agree to the social contract they will still be held accountable to it because the group functions as a democracy.
6. When going through the social contract process, get students to be as specific as they can be. When they say, "Treat each other with respect" (and, yes, every group will say that) ask them to be more specific and describe how they would know someone is being respectful or not.
7. At the end of class, make a photocopy of each group's contract. Post all of the contracts somewhere in your classroom so that the contracts are always present at every group meeting.

SAMPLE

Social Contract for Public Policy Groups

Directions: Now is your opportunity to set the culture and atmosphere for your group throughout your entire public policy project. As a group, please come up with some interesting answers to these questions.

Group Members: _____

1. How do you want to be treated by the other people in your group? (be specific!)

Be fair to one another, share work equally
Respect each other by listening.
Communicate clearly and be aware of what everyone is doing.
Feel responsible to one another for our project.
Make sure everyone is happy with decisions and feels comfortable with each other.
Attendance – being present is important!

2. What do you think the role of your teacher should be in this group?

To help answer questions, find resources.
To help organize the group.
To help us strengthen our weaknesses.
To be an advisor and be a mediator.

3. How do you think your teacher wants to be treated by you?

Respectfully, not being rude.
We should listen to her opinions when we ask for them (We don't have to agree with her opinions or follow her advice, but listen if we ask for it--she will try not to give unsolicited advice).
Not taking advantage of the help provided to us
Don't take advantage of her help

4. How do you want to handle the problems that come up in this group?

Address the person who is affected.
Talk about the problem.
Leave personal problems outside the classroom.
If can't resolve an issues, ask our teacher to step in as a mediator.

Chapter 1: A Framework for Public Policy Analysis and Action

**The following materials are provided here for Chapter 1:
New York City Case Study
Types of Public Policies (s)**

The New York City Case Study might be useful to your students in visualizing how to define a societal problem. The case study is something you can either write on the chalkboard or just discuss with them as a class.

The worksheet following the case study gives students a visual way to represent the different types of policies that exist.

New York City Case Study

IDENTIFICATION OF A SOCIETAL PROBLEM

In New York City, there are too many individuals without permanent homes. The geographic level of this problem is the local (city) level.

ONE PLAYER ACTIVE WITH THIS PROBLEM AT THE NYC LEVEL

One player active in alleviating the problem of too many people without permanent homes, is Commissioner Martin Oesterreich of New York City's Department of Homeless Services. Commissioner Oesterreich is a major player in this problem, because he is directly responsible for allocating funds directly to various homeless services throughout the city.

ONE CURRENT PUBLIC POLICY DEALING WITH THIS PROBLEM AT THE NYC LEVEL

Last year, a public advocacy group, Common Ground, signed a contract to transform a residential portion of the McBurney YMCA on 24th Street in Manhattan into affordable housing with social services. This newly created residential portion of the building developed 140 to 160 units of permanent supportive housing for low-income homeless adults, as well as an innovative 40-unit program for young adults at risk of homelessness.

Types of Public Policies (S)

In the table below, provide examples of each of the three elements of public policy (legislation, administrative acts, and judicial decisions) in each of the four government levels.

	Legislation	Administrative Acts	Judicial Decisions
Local			
State			
National			
International			

Chapter 2: Using the Library

The following materials are provided here for Chapter 2:

Making a Works Cited Page (s)

How to Use a Search Engine (s)

Useful Websites (s)

It is helpful for both you and your students to remember that all of the library research in this chapter is to help them gather enough evidence to prove their societal problem is, in fact, a problem. The following pages are helpful resources for students writing a Works Cited page and also conducting research on the Internet.

Making a Works Cited Page (s)

You should correctly cite all of your sources by following the examples below. Sources should be in alphabetical order by author. The words ‘Works Cited’ should appear at the top center of the page.

Book

Vissing, Yvonne. Out of Sight Out of Mind: Homeless Children and Families in Small Town America. Kentucky: University Press of Kentucky, 1996.

Newspaper

Herszenhorn, David M. “Councilmen Propose Overhaul of Policies on Street Vendors.” New York Times 11 Feb. 1999. morn ed.: B4

Periodical

Marano, Hara Estroff. “Domestic Violence.” Psychology Today Nov. -Dec. 1993: 48+.

Almanac

Alsop, Ronald J., ed. The Wall Street Journal Almanac 1999. New York: Ballantine Books, 1998.

Internet Sources

National Coalition for the Homeless. “Education of Homeless Children and Youth” <http://nch.ari.net> (22 Feb. 1999).

Be especially careful when citing internet sources. First, write the name of the organization whose website you got the information from. Next, write, in quotation marks, the title of the page or section from which you got the information you used. The address of the page should be the organization’s main website. Lastly, the date is the date you visited the site to gather information.

Interview

Pei, I. M. Personal interview. 22 July 1993.

How to Use a Search Engine (s)

- Use lower case letters
- Try to use specific words
- Add a “+” before each search word. This will require all words to be in resulting hits
- Exclude words by using a “-“ which will ensure the word is not in any hits
- Spell the words correctly!
- Try to use some different search engines. Some search engines are specialized for certain types of websites and search engines often find different websites when you type in the same search terms.

Useful Websites (s)

Search Engines

www.google.com
www.yahoo.com
www.lycos.com
www.altavista.com
www.dogpile.com
www.excite.com
www.northernlight.com
www.msn.com
www.go.com

Government Websites

New York State – www.state.ny.us
New York City – www.ci.nyc.ny.us
U.S. Census Bureau – www.census.gov
U.S. Environmental Protection Agency – www.epa.gov
U.S. Department of Education – www.ed.gov
Congressional Legislative Records – thomas.loc.gov

Public Policy Websites

www.speakout.com - A website to find information on policy topics.

www.publicagenda.org – A non-profit, non-partisan research organization devoted to public opinion and citizen education. Contains valuable information on child care, crime, education, the environment, poverty, and race issues.

www.nationalcenter.org – A policy institute covering a variety of social issues. www.cato.org – A gateway to an extensive database of policy analysis. Contains prepared statements made by senior Cato policy staff members before Congress, conference and lecture information, and online book catalog.

Chapter 3: Using Surveys

The following materials are provided here for Chapter 3:

New York City Case Study

Choosing Clients (s)

Example of a Bad Survey (s)

Example of a Good Survey (s)

Writing a Survey (s)

This Case Study goes through the process of how to conduct a survey. You should discuss this with your students before you give them the Good and Bad Case Study Surveys. The Choosing Clients page is successful as an overhead if you want your groups to help each other brainstorm clients, or students could fill it out individually before meeting up with their research groups.

New York City Case Study

DEVELOPING YOUR SURVEY

In developing a survey for the New York City Department of Homeless Services, the objective of the survey is to gauge public perceptions of homelessness in New York City. The survey will be conducted by a face-to-face method, where people will be selected at random on the streets on New York and at different locations for approximately a one-month period. The expected response rate of the survey is 80%, since the survey takes only a few moments to complete. The target population identified for the survey is the entire adult population of New York City. The desired sample size for the survey is 2500 respondents. In order to achieve this desired sample size, a sampling frame of 3125 individuals must be taken.

Choosing Clients (s)

Directions: Please write down three possible clients you could be writing your research papers for.

1.

2.

3.

Good Case Study Survey (s)

NYC Department of Homeless Services Survey April 24, 2001

Please Circle Your Age: 18-34 35-55 56-65 Over 65

Please check the most appropriate response to each question.

1. Do you think homelessness is a problem in New York City?
 yes
 no
 not applicable

2. If yes, how serious of a problem is homelessness in New York City?
 very serious
 serious
 somewhat serious
 not at all serious
 not applicable

3. Do you feel that New York City currently provides enough homeless services to those in need of them?
 yes
 no
 not applicable

4. How would you feel about the possibility of New York City putting funds into developing more low-cost housing for individuals and families with low incomes and no homes?
 strongly favor
 favor
 neutral
 oppose
 strongly oppose
 not applicable

5. What do you think are the main causes of homelessness in New York City?

Thank You!

Bad Case Study Survey (s)

SURVEY

Age: 18-34 35-55 56-65 Over 65

1. Do you think homelessness is a problem?
 yes
 no

2. If yes, how serious of a problem is homelessness in New York City?
 very serious
 serious
 somewhat serious

3. Do you feel New York City currently provides enough homeless services to those in need of them?

4. How would you feel about the possibility of New York City putting funds into developing more low-cost housing for individuals and families with low incomes and no homes?
 strongly favor
 moderately favor
 slightly favor

5. If you think homelessness is a problem, please describe why?

Writing a Survey (s)

Survey Guidelines:

- Surveys provide information, they do not prove your point
- Questions can not be biased or leading
- Survey should consist of 5-7 closed-choice questions
- You can include one open-ended question if you want
- Each person must survey at least 20 people

Directions: Using the above guidelines, make the following decisions about your survey and create your survey questions.

1. What is the purpose of your survey? Be very specific (including who is your client that would want this information)
2. What is your target population?
3. What will your sample size be?
4. How can you work to avoid sampling bias?
5. What method are you going to use to conduct your survey?
6. Now **create your survey questions** with your knowledge of what makes a good survey.

Chapter 4: Gathering Information from Knowledgeable People

Your students need to not only conduct a survey, but also conduct an interview. They should interview an expert, player or stakeholder related to their topic area. To help them prepare for their interview, ask students to brainstorm a list of questions they could ask an expert, player or stakeholder that will gain useful information for their client.

Chapter 5: Describing the Problem and Identifying its Causes

The following materials are provided here for Chapter 1:

New York City Case Study

New York City Case Study

The following piece of the New York City case study show students that there are many complicated factors causing societal problems. Once you discuss the case study with them, use the handout on the following page to have them discuss causes of their societal problems in their groups. Our case study includes more than four causes but your students are only responsible for four. It is important that they do not miss the most obvious causes.

The case study following the causes of the problem discusses evidence of the problem. Keep in mind that we have not included a graph showing evidence of the problem over time but your students should be able to do that.

New York City Case Study

MAJOR CAUSES OF THE PROBLEM

The major causes of the problem are the following:

- **High cost of living:** The extraordinarily high cost of living in New York City has forced many families to take to the streets. Recently, market rents have nearly doubled in previously working class neighborhoods such as Astoria in Queens or Greenpoint in Brooklyn. With current trends, it would not be uncommon for someone to pay \$1,500 or more for a studio apartment, or \$2,000 or more for a one-bedroom apartment. (www.wsws.org).
- **Increased population of low skilled workers:** Within the past two decades, approximately 2 million immigrants have migrated to the city of New York. Unfortunately, the only chances for employment have been low-wage service opportunities mostly in the fast food or retail industries, which typically pay the minimum wage of \$5.15 per hour (www.wsws.org). These low wages do not provide sufficient sources of income for many immigrants who cannot find housing based on their salaries.
- **Decrease in affordable housing:** Over the past twenty-five years, there has been a serious decline in the amount low-cost housing available in the city of New York. In 1970, there were 272,000 more low-costing rental units than there were poor households. However, by 1995, the case had reversed, with the affordable housing gap growing to 405,925 more poor households than low-cost units available (www.wsws.org).

- **Mental illness:** For those homeless people who suffer from different types of mental illness, they do not usually get the care they need and due to their illnesses they typically do not have the sense to seek help or the capacity to pull themselves out of poverty.
- **Drug/alcohol addiction:** Typically, many homeless people suffer from type of substance abuse addiction, and this impairs them from getting a job or saving enough money to afford a place to live because they waste their money supporting their individual addictions.
- **Lack of education:** Many homeless individuals have little or no levels of formal education, and this impedes them from getting competitive jobs since they have no real skills that companies may be looking for.

New York City Case Study

EVIDENCE OF THE SOCIETAL PROBLEM

Evidence of the fact that there are too many people in New York City without a permanent place to live is as follows:

- The current census of homeless families and single adults in New York City's shelter system has reached the highest levels since the late 1980's. The number of families applying for emergency shelters has risen 10 percent in the last year (Gershenson A2).
- On an average night during the winter months, the city of New York provides beds for 10,177 children and their 8,024 adult family members, plus another 7,492 single adults. This adds up to 25, 693 individuals in the shelter system, and does not include the tens of thousands who live on the streets (www.cato.org).
- The number of rental units available for rent have fallen from 2,028,303 in 1991 to 2,017,701 in 1999, a loss of more than 10,000 apartments during a period where the city's population grew by approximately 1.7 percent, to a staggering 7,428,000 estimated people in 1999 (www.cato.org).
- The number of low-cost apartments shrank by half in less than a decade during the 1990's. Units with gross rents below \$500 represented 47.6% of apartments in 1991, but only 21.3% in 2000 (Cooper B1).

Chapter 6: Formulating a Position on a Public Policy Issue

The following materials are provided here for Chapter 1:

New York City Case Study

New York City Case Study

Policy Alternative Check Lists (s)

Feasibility/Effectiveness Chart (s)

The first New York Case Study related to this chapter includes three very detailed case studies. One way you could use these would be to first have your class brainstorm policies for the case study on their own. Then have them share with each other what they came up with. Next, you would describe the three policies we've provided. This way, they can see how many different types of policies there are. After going over the case study, the "Policy Alternative Check List" is a great tool to help students begin creating their own policies. A good follow-up after that exercise is to have students complete Exercise C.

New York City Case Study

DEVELOPING THREE PUBLIC POLICY ALTERNATIVES

Three possible public policies that are not currently implemented at the New York City level:

- The city of New York could create a commission on homelessness. This commission would be solely responsible for examining the current state of homelessness in the city and all the policies and organizations that effect homelessness, and whether or not they are working effectively at alleviating the problem. From the investigations of the commission, who would be under direct control of the Office of the Mayor, they would be looking closely at possibilities of restructuring the existing city budget towards homeless aid. This would allow the commission to identify areas receiving the most allocation of city funds, and which areas are not completely effective in alleviating the problem of homelessness in New York City. Essentially, this tells the commission what exactly is working and not working within city organizations when it comes to fighting homelessness.
- The New York City Housing Department and Zoning Board should look into possibly repealing the Wicks Law. In doing so, it would allow for greater zoning flexibility, and would create an increased mix of commercial and residential uses, which would bolster the economies of many neighborhoods and would help provide low-cost housing and greater chances for employment for people in need of it.
- The Department of Homeless Services would provide a grant program available through all registered shelters in New York City, and funded through money allocated from the Department of Housing and Urban and Development each year. The purpose of the grant program is to create supportive housing and services to allow homeless people to live as

independently as possible. This grant program would get individuals to move into independent living arrangements. Program funds would be directed at helping homeless people live in a stable place, increase their skills or income, and gain more control over the decisions that affect their lives.

Now that they have completed their three policy alternatives, we present your students with the part of the New York City Case Study, which examines how feasible and effective these alternatives are. Once students have a good understanding of these concepts, they can plot the feasibility and effectiveness of their own policy alternatives on the handout provided.

New York City Case Study

EVALUATING POLICY ALTERNATIVES

POLICY #1: HOMELESS COMMISSION

FEASIBILITY: HIGH This policy would have high feasibility because the mayor or other experts within political office are likely to take a stance for the implementation of this policy.

EFFECTIVENESS: LOW This policy would have medium effectiveness because while it will place more people, time, and money targeting the problem of too many people without permanent homes in New York City, it does not provide any immediate action to alleviate the problem of too many people without permanent homes.

POLICY #2: REFORMATION OF BUILDING CODE AND ZONING REGULATIONS

FEASIBILITY: LOW This policy requires a serious legislative action on the part of City Planning and Zoning boards. Therefore, it is not likely that anyone will rezone, since it would most likely cause a political nightmare that most politicians are not willing to get into.

EFFECTIVENESS: MEDIUM This policy has medium effectiveness because this type of housing arrangements really only provides assistance to those people who have low paying jobs and cannot keep a stable home because of rising rent costs, and it does not do anything for people with no money.

POLICY #3: GRANT PROGRAM TO HOMELESS INDIVIDUALS:

FEASIBILITY: HIGH This policy would have a high feasibility because the Department of Homeless Services already has funds from the Department of Housing and Urban Development that can be used to begin the program.

EFFECTIVENESS: MEDIUM The policy is somewhat limited in the resources it can provide to the entire population, and so only a small percentage of the entire population will be able to participate in the program.

PREFERRED POLICY

After careful consideration of all three policy alternatives the preferred policy is to use previously allocated funds to create a grant program through the New York City Department of Homeless Services, where money would be targeted at getting homeless individuals into stable living environments, increasing their job skills and incomes, as well as providing counseling for possible drug and alcohol addictions, and ways to deal with personal issues. This policy is superior to the other two policies in terms of feasibility and effectiveness is because the policy calling for a repeal of the existing Wick Law, which sets current zoning ordinances, is not at all feasible since it would cause political turmoil and has only a medium effectiveness because it would only generate business in a small number of areas throughout the city. The second policy of forming a homeless commission policy intended to identify useful and already existing homeless services in the city is very likely of being implemented, but has no real chance of being effective because it provides no real plan to alleviate the existing problem. Therefore, the policy developing a grant program is the best policy because it has a high likelihood of being implemented since much of the funding is already in place, and will still help to alleviate the problem of too many people without permanent homes by providing them with places of residence, job skills, and counseling.

Policy Alternative Check Lists (s)

When you are creating your three policy alternatives . . .

- Remember the causes of the problem. Policies can often work to alleviate causes, which improve the problem.
- Look for policies that currently exist at the same level in other places, so you could apply them to New York City OR for policies that currently exist at a different geographic level so you could make the policy work for New York City.
- Talk to players who are involved in your societal problem or have knowledge of existing policies.

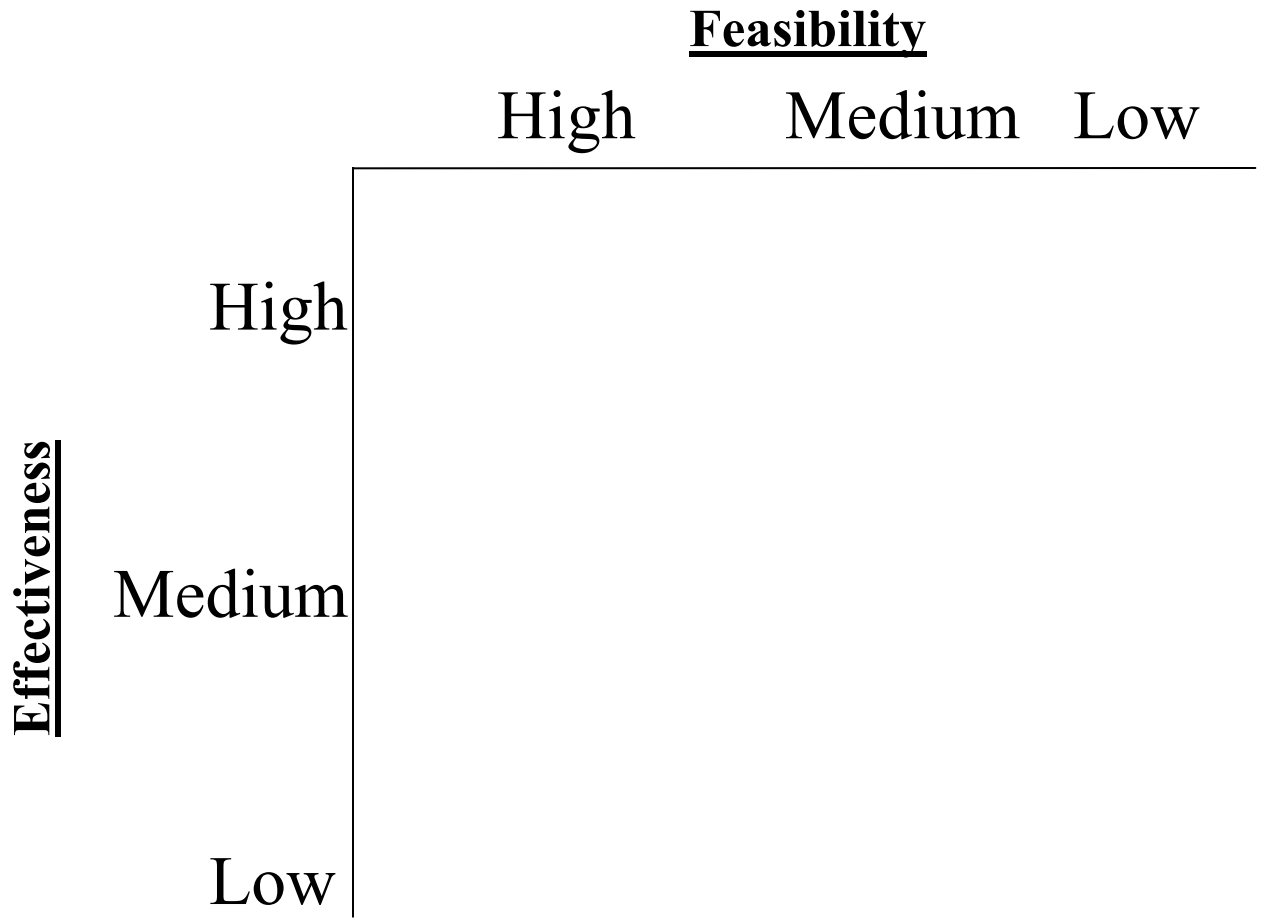
When you choose three policy alternatives, ask yourself . . .

- Is this a government action?
(correct answer: YES!)
- Is this at the correct geographic level? (OR can I argue for why this policy is at an appropriate level? For example, is there a national policy that would really solve the problem in NYC? OR would you like to create a policy for one borough instead of the whole city?)
(correct answer: YES!)
- Do I know who is going to implement the policy?
(correct answer: YES)

Now . . . our three policy alternatives are:

- 1.
- 2.
- 3.

Feasibility/Effectiveness Chart (s)



Chapter 7: Examining Benefits and Costs of a Policy

The following materials are provided here for Chapter 1:

New York City Case Study

Cost-Benefit Ratio Worksheet (s)

Monetary Costs of a Public Policy (s)

In Chapter 7 the New York City Case Study chooses one policy alternative based on the analysis of effectiveness and feasibility in Chapter 6. This section weighs the benefits and costs of the policy to determine if it worth pursuing or not. Following an explanation of this to your students, the Cost/Benefit Ratio Worksheet will be helpful for them to determine the chosen policy to alleviate their specific societal problem.

Once they have finished their Cost-Benefit Ratio Worksheet they will be ready to finish Exercise D providing all the information about their preferred policy alternative.

An Additional worksheet has been added which has to do with budgeting. It is not discussed in the Public Policy Skills book, however, it is often a good lesson to have your students complete a budget for their preferred policy. When it comes time to plan a Prince Chart and evaluate the issue position and priority of specific players, monetary issues and budgets are frequently factors. Therefore, if you are interested in having your students develop a budget for their policy there is a “Budget Outline” following the Cost-Benefit Ratio Worksheet.

New York City Case Study

BENEFITS AND COSTS OF THE PREFERRED POLICY ALTERNATIVE

BENEFITS

-provides immediate and stable housing for individuals in need **(3)**.

-gives individuals necessary job skills they can use to find employment in a number of different fields previously unavailable to them because of their low skill level **(3)**.

-helps homeless individuals deal with serious personal issues that keep them from climbing out of poverty **(2)**.

COSTS

- the financial burden on the DHS to provide enough grants to make a small difference **(3)**.

- because of the immense financial costs and organizational needs as well, this program could take away from other effective and necessary Services **(2)**.

- the general public may become enraged with the program because they may see it as a handout **(1)**.

JUSTIFICATION OF BENEFITS AND COSTS

A value of “3” is assigned to the benefit of immediate and stable housing for individuals in need because this gets at the heart of the problem. A ranking of “3” was given to the benefit of giving homeless individuals necessary job skills, because this will ultimately allow these individuals the chance to maintain a stable job, home, and income. A “2” was chosen to helping homeless individuals with serious personal issues because while this benefit helps the homeless in a variety of ways, it is not the original intent of the policy. For costs, a ranking of “3” was given to the financial burden on the Department of Homeless Services because this will be the greatest roadblock keeping this policy from getting implemented and maintained for an extended period of time. A ranking of “2” for the taking away from other effective and necessary services because while these other services are important, this policy is not expected to take huge amounts from other services, but only moderate amounts, and the other services will most likely be able to continue effectively. A value of “1” was given to the public discontent with the policy because this is something to be expected. Every day, policies are implemented with public discontent. This cost has no major impact on the likelihood of this policy being implemented and maintained.

BENEFIT-COST RATIO

$$\frac{3+3+2 \text{ (total benefits)}}{3+2+1 \text{ (total costs)}} = \text{benefit-cost ratio}$$

$$\frac{8}{6} = 1.33 \text{ (Since the ratio is above 1.0, it can be reasonably inferred that the benefits outweigh the costs and the preferred policy is worth pursuing).}$$

Cost/Benefit Ratio Worksheet (s)

Policy #1

	Benefits	Ranking		Costs	Ranking
1.			1.		
2.			2.		
3.			3.		
	Total =			Total =	

Benefit/Cost =

Policy #2

	Benefits	Ranking		Costs	Ranking
1.			1.		
2.			2.		
3.			3.		
	Total =			Total =	

Benefit/Cost =

Policy #3

	Benefits	Ranking		Costs	Ranking
1.			1.		
2.			2.		
3.			3.		
	Total =			Total =	

Benefit/Cost =

Monetary Costs of a Public Policy (s)

A. Supplies and Materials \$ _____

Examples: paper, printing, copying...

B. Equipment \$ _____

Examples: computers, printers, beds...

C. Project Support \$ _____

Examples: computer programmers, consultants...

D. Travel and Training \$ _____

Examples: bringing in consultants, training employees...

E. Wages \$ _____

People X \$/hour X hours/day X days/month

Total Monetary Costs Needed \$ _____

Chapter 8: Forecasting the Effect of a Policy

**The following materials are provided here for Chapter 8:
Microsoft Excel Tutorial for PAF 101**

To assist your students in completing the Chapter Exercises 8.1-8.4, a tutorial is provided for beginners in Microsoft Excel.

Microsoft Excel Tutorial for PAF 101 (s)

(FOR IBM COMPATIBLE PERSONAL COMPUTERS)

Your goal is to complete 8.1-8.4 using Excel.

A blank, standard Excel spreadsheet looks like this:

	A	B	C	D	E	F	G	H	I	J	K
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											

These are several general notes to know about Excel:

- The document you are working on is called a workbook. The workbook is comprised of one or more worksheets within the document. In a workbook, one worksheet could be a table, the next a chart, and the next a graph; but they would all be based on the same data.
- Each **column** is represented by a letter.
- Each **row** is represented by a number.
- Each **cell** is represented by a letter and number combination (A4).
- Each **field** is represented by the cell names separated by a colon (A4:A10).
- You can select a cell to enter data into by clicking on it.
- When you are done typing the data in, you can press **enter** or any of the **arrow keys** on the keyboard to move to another cell.
- When you put the mouse cursor (the arrow) over any of the buttons at the top of the screen, words will appear underneath to tell you what the button is for. These buttons are “shortcuts” to help you perform many of the common functions used in Excel. This tutorial will explain the functions and their shortcuts.
- When you want to use one of the button functions, you select the appropriate cell or highlight the cells and then click on the button.
- If you enter numbers, they will automatically right justify. If you enter text, it will automatically left justify. If you enter any combination of numbers and letters, it will left justify. This can be easily changed by highlighting the data and selecting the appropriate justify button.

Exercise 8.1 (s)

Listing of Data on the Number of Larcenies in Residence Halls, at Citrus University, 1994-1998.		
Time Period	Number of Larcenies	Source or Rationale
1994	136	Citrus Univ. Security Dept. Annual Report, 1994.
1995	123	Citrus Univ. Security Dept. Annual Report, 1995.
1996	142	Citrus Univ. Security Dept. Annual Report, 1996.
1997	126	Citrus Univ. Security Dept. Annual Report, 1997.
1998e	136	Between January and June 1998, 68 larcenies were reported. The estimate was made for all of 1998 by doubling that number because about the same number of larcenies occur in each six-month period.

To create a spreadsheet that looks like the example above, follow these steps:

1. Enter the title of the table in cell A1. To fit more text in a cell, you can make its height greater while not making it any wider. To do this: **highlight** the cell, **right click** on your mouse, click on **Format Cells**, go to the **Alignment** tab, and check off **Wrap Text**. Otherwise, your title will extend into more than one cell.
2. Now, enter your column headings in row 4 in each consecutive cell. **Adjust the column width** to make the headings fit.
 - a. To automatically adjust the column width, move the arrow between the gray letter headings until it changes shape to a vertical bar with two arrows pointing either way horizontally. Then double click your mouse and it will become as wide as the longest text written in that column.
 - b. To manually adjust the column width, press the mouse button down when the cursor changes shape and drag the mouse either way while keeping the button depressed. Let go when it's the size you want.
3. Enter your data under the appropriate column headings. Note that you should **wrap your text** if it becomes too long in the "Source or Rationale" column.
4. **Center** the year and number columns, both the headings and the data. To do this: **highlight** the area that you want centered and then **click** on the toolbar shortcut button with the lines that look centered. This button is in between the buttons to left and right justify.

5. **Bold face** the title and the column headings. Highlight the cells you want boldfaced. Then click on the toolbar shortcut button with the large **B**. Your goal is to create a table that is similar to the example with your data.
6. To prepare your table so it has some specific gridlines, you may have to **highlight** the table in sections. You want the gridlines to *distinguish the columns, but not the rows* (with the exception of the column headings). To do this: go to the **Format** menu and on the **Borders** tab click on the lines as needed so that the lines show up where you need them for the text you have highlighted. The gridlines on your table should mirror the gridlines in the provided examples for each exercise.
7. To **save and print** the document: Go to the **File** menu and select **Save or Save As**. You will see a Save dialogue box. Make sure the **Drives** menu says a: (or whatever drive your disk is in). **Type the name** of the document in the name box. Click the **OK** button. To print the document, go to the **File** menu and select **Print**. Press **OK** in the Print dialog box if all the information is correct. (It should be.)
8. Do not close this document. Go on to the next exercise.

Exercise 8.2 (s)

You already know how a standard spreadsheet works. Now you will learn some more skills in Excel. You will use part of the data you have already entered in the previous exercise.

To do the Historical part of the table (top), follow these steps:

1. **Highlight** the spreadsheet you just created in Excel, go to the **Edit** menu, and select **Copy** (OR press Control C once you have highlighted the selection OR press the shortcut button which looks like to pieces of paper on top of each other). You have now copied the selection.
2. On the bottom of your Workbook click on the tab for **Sheet 2**. You have been working in Sheet 1. Once you are in Sheet 2 put your cursor in the A1, go to the **Edit** menu and select **Paste** (OR press Control V OR press the shortcut button that looks like a clipboard with a piece of paper). Now you should see the spreadsheet from the Sheet 1. This will allow you to keep the table you already made and to change the same information to present new information.
3. Next, **clear** the title and the third column, “Source or Rationale”. To do this: **highlight** all the cells, select the **Edit** menu, and select **Clear Contents**.
4. Enter the column headings for Exercise 8.2 that are missing.
5. **Boldface** and **center** the new headings.
6. Note that you need to **right justify** numbers in the “Time Period” and “Number of Larcenies” columns because they are centered from the previous exercise.
7. Plug your numbers into the “Calculations Percentage Change” column, following the format. This is the “**showing your work**” column.
8. Note that what you see on the following page is the *exact format* you must use when entering your formulas and percents.
9. In the “Percentage Change Historical” column, you are using formulas to get the correct percentage. The program does the math for you. Again make sure you follow the *exact format* and put the appropriate values in. If you have spaced everything just like the example, you should be entering the exact same formula. Just remember to look at the “Calculations Percentage Change” column first and type the formula according to those fields in your chart. Refer to the example sheet on the following page.
10. Once you have entered the formulas and pressed **enter**, you should see the number that is a result of the formula. You may need to **reduce the number of decimal places** you see. To do this: **highlight** the column of percentages and then press one of the two **shortcut buttons** in the toolbar with .00 and an arrow going either way on them. These will

increase or decrease the amount of places shown. Press the shortcut button that will decrease your number to one decimal place. If these buttons do not appear in your toolbar, press the small button on the far right that has two arrows and a down arrow. You can choose to add these two shortcuts to your toolbar for convenience.

11. The “Average Historical Percentage Change” also uses a formula. Type the formula into the cell using the appropriate values. Again, remember to check what the range of cells your data are in. Follow Step 8 for reducing the number to one decimal place.

To do the Forecast part of this table (bottom), follow these steps:

1. First plug in your predicted percentages as **decimals**. **Highlight** the decimals you just entered and then click on the **shortcut** button that has the % symbol on it. This will show the percent value.
2. In the “Forecast Calculation” column there is a slight but important difference from the actual formula you enter in the Number column. When showing your work in this column, all of the equations will follow the same format as in the book. If the predicted % is negative, you show a subtraction and vice versa. In the “Number of Larcenies” column where you enter the formula, however, you add the absolute value all of the equations no matter what the sign. This is because when you tell the computer to multiply by a cell value (i.e. -.05), it already takes into account that it is negative.
3. You will need to **right justify** the “Forecast Calculation” column.
4. Next, the formulas go in the “Number of Larcenies” column. Follow the format given on the example sheet. Your screen should look like the following sheet.
5. To **save** this document: Go to the **File** menu in the menu bar and select **Save** (OR press the shortcut button that looks like a floppy disk to save).

These are the formulas your should enter into your table for this exercise:

Baseline Forecast of Larcenies in Citrus University Residence Halls			
Time Period	Number of Larcenies	Percentage Change Historical	Calculations Percentage Change
1994	136		
1995	123	$=((B20-B19)/B19)*100$	$((123-136)/136)*100$
1996	142	$=((B21-B20)/B20)*100$	$((142-123)/123)*100$
1997	126	$=((B22-B21)/B21)*100$	$((126-142)/142)*100$
1998e	136	$=((B23-B22)/B22)*100$	$((136-126)/126)*100$
Average Historical Percentage Change (1994-1998e)			=AVERAGE(C20:C23)
Time Period	Number of Larcenies	Forecast	Forecast Calculation
1999f	$=(B23)+(B23*C28)$	-0.05	$(136)-(136*.05)$
2000f	$=(B28)+(B28*C29)$	0.07	$(129)+(129*.07)$
2001f	$=(B29)+(B29*C30)$	-0.06	$(138)-(138*.06)$

This is what your table will look like once Excel processes each formula:

Baseline Forecast of Larcenies in Citrus University Residence Halls			
Time Period	Number of Larcenies	Percentage Change Historical	Calculations Percentage Change
1994	136		
1995	123	-9.6%	$((123-136)/136)*100$
1996	142	15.4%	$((142-123)/123)*100$
1997	126	-11.3%	$((126-142)/142)*100$
1998e	136	7.9%	$((136-126)/126)*100$
Average Historical Percentage Change (1994-1998e) = .6%			
Time Period	Number of Larcenies	Forecast	Forecast Calculation
1999f	129	-5.0%	$(136)-(136*.05)$
2000f	138	7.0%	$(129)+(129*.07)$
2001f	130	-6.0%	$(138)-(138*.06)$

Exercise 8.3 (s)

By now you should have had a good idea of how an Excel spreadsheet works. You should already know how to:

- Enter data
- Boldface Center
- Adjust column width
- Center, left, and right justify cells
- Show the percent sign
- Enter formulas using the given format

1. Remember in this exercise that when dealing with the “Forecast Calculation” column and the “Forecast Number” column, there will be the same differences as in 8.2. The number column will be added or subtracted depending on the sign, and the formula will always be added.
2. It is a good idea to **copy** the table you have now and **paste** it in a new worksheet (the same workbook!). Then **clear** the cells as you need to input the correct information.
3. Create an additional column in your table, which is not in the example in the book. This is needed for Excel to process the formulas. Look at the sample tables provided below to see what the final column should look like.
4. Now, complete this exercise using the format given and your previous work in Excel.

With the formulas, your table should look like this:

Policy Forecast of Security Awareness Program					
Time Period	Historical Number	Baseline % Change	Policy % Change	Forecast Calculation	Forecast Number
1994	136				
1995	123				
1996	142				
1997	126				
1998e	136				
1999f		-0.05	-0.1	(136)-(136*.10)	=(B40)+(B40*D41)
2000f		0.07	-0.01	(122)-(122*.01)	=(F41)+(F41*D42)
2001f		-0.06	0.01	(121)+(121*.01)	=(F42)+(F42*D43)

This is what your table should look like without the formulas:

Policy Forecast of Security Awareness Program					
Time Period	Historical Number	Baseline % Change	Policy % Change	Forecast Calculation	Forecast Number
1994	136				
1995	123				
1996	142				
1997	126				
1998e	136				
2000f		-0.05	-0.1	(136)-(136*.10)	122
2001f		0.07	-0.01	(122)-(122*.01)	121
2002f		-0.06	0.01	(121)+(121*.01)	122

Exercise 8.4 (s)

You have now used Excel for editing and manipulating data and doing calculations. Creating a chart in Excel will require an additional table that is not shown in the book.

You need to compile the data from 8.2 and 8.3 in a new table that looks exactly like this:

Time Period	Historical Number	Baseline Forecast	Policy Forecast
1986	136		
1987	123		
1988	142		
1989	126		
1990e	136	136	136
1991f		129	122
1992f		138	121
1993f		130	122

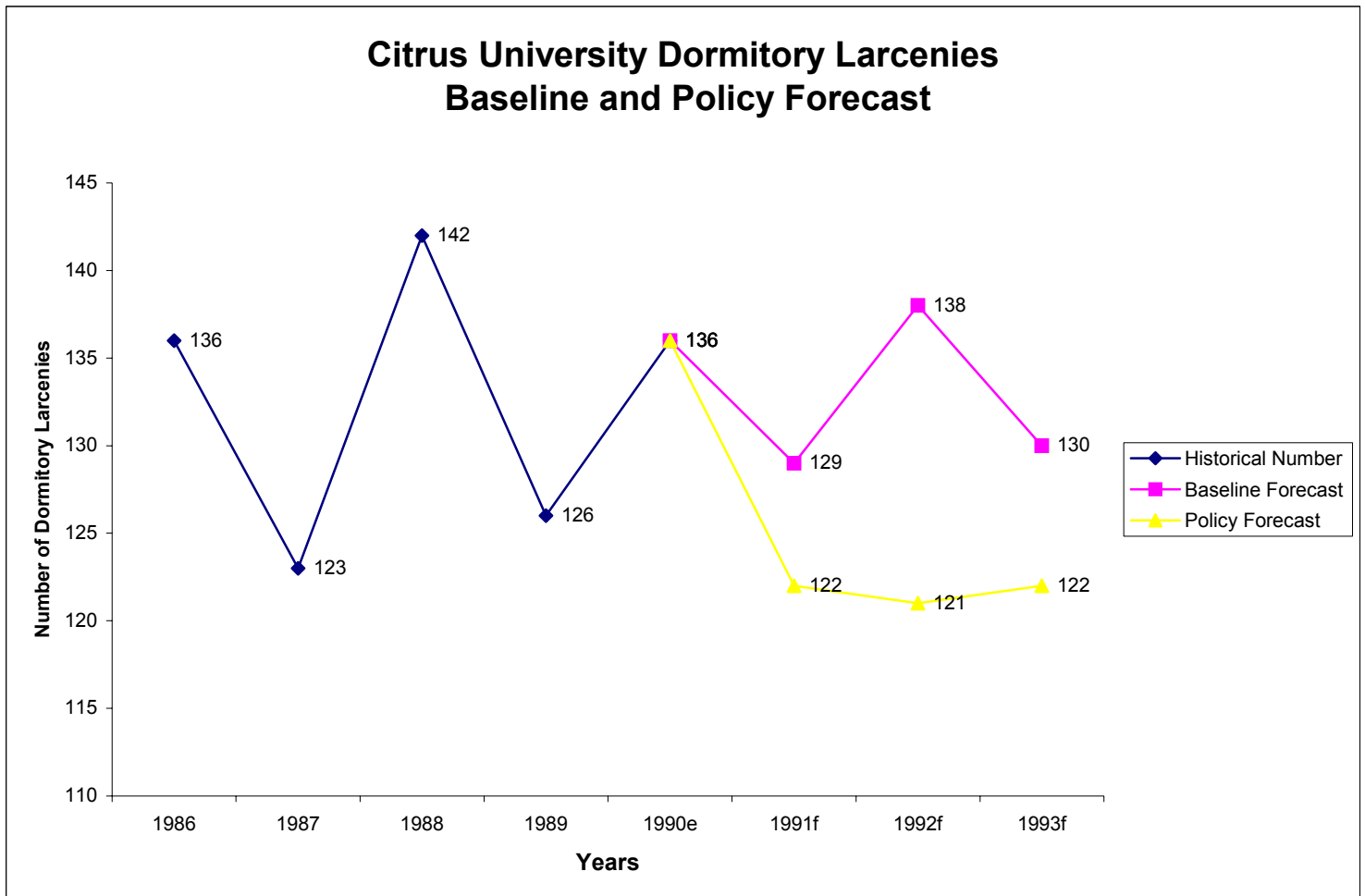
Now, you are ready to create your chart for 8.4 following these steps:

1. **Highlight** the table you just entered, including column headings.
2. Click on the **Chart Wizard button**, which is the shortcut button on the toolbar with the picture of the bar graph.
3. The Chart Wizard will now take you through a series of steps to creating a chart.
4. The first thing you'll see is the "**Standard Types**" tab. Click on **Line** and then choose the line graph with two different colored lines and points, where the lines are overlapping each other. Click **Next**.
5. Click **Next** on the "**Data Range**" tab because you want your graph to be sorted by columns from your table (which is the default option here).
6. Now, insert **titles** and **labels** for the x-axis and y-axis. You can also **modify the gridlines** that appear in your finished graph. Click on **Next**.
7. Choose to either **put your chart in Sheet 1 or create a new sheet** for the graph, which is labeled Chart 1. Click **Next**.
8. Your chart will appear on whichever sheet you chose in Step 7.

To edit the chart, follow these steps:

1. If you **click once inside** the chart, you will see small black boxes all around the border. You can click on these and drag them to enlarge the chart.
2. If you **right click inside** of the chart, you will see a menu pop up with options for editing the chart area and the separate parts of the chart.
3. Also to **edit** (move, make smaller/bigger, change style, etc.) any parts of the chart (title, axis, legend, etc.), you can double click on those parts. At this point you should **clear** the gray background of the chart and its gridlines. Also **insert** the value labels for each data point.
4. If you need to edit the lines for each of the values, you can double click on any of the 3 lines to make the appropriate changes.
5. **By this time, you should have a chart that follows the same format as the following. This example is not 100% identical to the chart in the textbook on pg. 90. However, it is a more professional looking chart and displays the information even more clearly.**

Your Chart should look like this:



Chapter 9: Forecasting Implementation with the Prince System

**The following materials are provided here for Chapter 9:
New York City Case Study
Prince Chart (s)**

New York City Case Study

COMPLETING THE PRINCE CHART AND CALCULATING THE
PROBABILITY OF THE POLICY BEING ACCEPTED

PLAYER ONE: Rudolph Giuliani, Mayor

Issue: 0 Mayor Rudolph Giuliani recognizes the fact that homelessness is a serious issue for the city of New York, however, he must remain neutral on many issues, in hopes of not causing any political turmoil that could hurt his chances for re-election to the mayoral office, or other offices in the future.

Power: 5 Mayor Giuliani has jurisdiction over all agencies within this city and his word is the final say on any possible policies hoping to be implemented.

Priority: 1 While this is a serious issue and needs immediate attention, the Mayor has a number of other responsibilities and it is unlikely that this issue will receive his utmost attention.

PLAYER TWO: Marty Oesterreich, Commissioner of the Dept. of Homeless Services

Issue: +3 As Commissioner of Homeless Services, Mr. Oesterreich is dedicated to providing the most effective and feasible services to the homeless of New York City. Therefore, he would be in support of the policy, but as Commissioner he is expected to be critical of every policy in order to determine if it is worth pursuing.

Power: 3 Mr. Oesterreich does have a certain level of power in terms of this policy, although his level of influence is not supreme. However, Mr. Oesterreich would be responsible for overseeing the policy, so his power receives a moderate ranking.

Priority: 2 Since alleviating the problem of homelessness is Mr. Oesterreich's job as Commissioner of Homeless Services for New York City, any policy directed at somehow lessening the issue should and would be a priority, but as commissioner he does have a number of other duties.

PLAYER THREE: Mark Glickson, Director for the Office of Homeless Prevention

Issue: +3 As director of an office intended to prevent homelessness in New York City, Mr. Glickson would be in favor of a policy dedicated to providing valuable and necessary services to homeless individuals, but he as well is expected to be critical in order to determine if a policy is truly worth pursuing.

Power: 2 Even though he is director of the Office of Homeless Prevention, Mr. Glickson falls under the authority of Mr. Oesterreich and Mayor Giuliani. Even though his office will be directly responsible for implementing this policy and documenting its effectiveness, he does not have absolute decision making power with this policy, and so his power rating receives a lower ranking.

Priority: 4 Even though his power on this policy is somewhat limited, Mr. Glickson remains the Director for the Office of Homeless Services, and it is still his job to devise plans to alleviate homelessness in New York City. It is likely, that this type of policy initiative will be near the top of his priority list.

PLAYER FOUR: Department of Housing and Urban Development

Issue: -3 The Department of Housing and Urban Development, who provides federal funds to the NYC Department of Homeless Services, would most likely not be in total support of this policy. While the policy would attempt to provide valuable services to individuals in need, it requires a large financial outlay to provide funds for the grant program. Therefore, HUD may not want this policy because DHS could request an increase in federal funding.

Power: 5 Because a large amount of NYC Department of Homeless Services budget is from the Department of Housing and Urban Development, a dislike for this policy on the behalf of HUD could result in a cut of federal funds, and so this gives HUD a high power ranking because they allocate a large amount of funding into the DHS budget.

Priority: 2 Because HUD is a federal agency, it provides funds not only NYC Department of Homeless Services, but other agencies across the country. Therefore, exactly what is going on in the city of New York is not the top priority of an agency with so many other responsibilities. Yet, because HUD money is being used in New York City, the federal agency does take small interest in the issue.

PLAYER FIVE: NYPD Transit Bureau's Homeless Outreach Squad

Issue: -3 Since the implementation of this policy may result in some financial cutbacks for other homeless services provided throughout the city, the NYPD Transit Bureau's Homeless Outreach Squad may be downsized or eliminated completely to free up funding. Because of this, these officers, who may enjoy being a part of this type of program would be transferred to another police detail or fired, and so they would most likely be opposed

to the implementation of this policy.

Power: 1 While these officers could battle not to be transferred or let go, they have no real power in this situation and must simply accept administrative decisions as they are made.

Priority: 2 Because the implementation of this policy could have direct impact on the jobs of the these officers in the Homeless Outreach Squad, the policy will cause them to have slightly prioritize it above other things..

Players	Issue Position	Power	Priority	Prince Score
1) Rudy Giuliani	0	5	1	= (5)
2) Marty Oesterreich	+3	3	2	= +18
3) Mark Glickson	+3	2	4	= +24
4) HUD	-3	5	2	= -30
5) NYPD Outreach	-3	1	2	= -6

Calculation of Probability

Sum of all positive scores plus ½ neutral scores = 44.5

Sum of all scores ignoring signs and parenthesis = 83

Probability of support = $\frac{44.5}{83} = .5362 = 54\%$ (always round off to 2 digits)

The probability that this policy will be implemented is 54%. This figure shows that the policy is slightly more likely to be implemented. However, even though the policy has a better than 50% chance of being implemented, the result is not conclusive, and a slight shift downward with any of the players could result in the policy not being implemented.

Prince Chart (s)

Please use this Prince Chart sheet in your groups to determine the probability of your policy's implementation. When you determine the probability, if it is much greater than 50% your group should re-evaluate the values you assigned your players. For homework, complete a neat Prince Chart on the following page and turn it in to your Intern.

Prince Chart

Societal Problem: _____

Geographic Location: _____

Preferred Policy: _____

	PLAYERS	ISSUE POSITION -5 TO +5	X	POWER 1 TO 5	X	PRIORITY 1 TO 5	=	PRINCE SCORE
#1	_____	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	=	<input style="width: 40px; height: 30px;" type="text"/>
#2	_____	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	=	<input style="width: 40px; height: 30px;" type="text"/>
#3	_____	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	=	<input style="width: 40px; height: 30px;" type="text"/>
#4	_____	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	=	<input style="width: 40px; height: 30px;" type="text"/>
#5	_____	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	X	<input style="width: 40px; height: 30px;" type="text"/>	=	<input style="width: 40px; height: 30px;" type="text"/>

To calculate the probability of implementation of your policy:

$$\frac{\text{SUM OF ALL POSITIVE SCORE PLUS 1/2 OF THE NEUTRAL SCORES}}{\text{SUM OF ALL SCORES IGNORING SIGNS AND PARENTHESES}} \times 100 = \text{---} \times 100 = \text{---} \%$$

Microsoft Excel Tutorial for Survey Data

The following materials are provided here for the Microsoft Excel and PowerPoint tutorial:

Lesson Plan: Practice Data Entry
Practice Entering Survey Data in Microsoft Excel
Sample Excel Spreadsheet
Lesson Plan: Data Entry
Sample Coding
Lesson Plan: Creating PivotTables
Creating PivotTables
Sample PivotTables
Lesson Plan: Making Graphs
Making Graphs

The Microsoft Excel tutorial is for survey presentation and analysis and should not be confused with using Excel in Chapter 8 for forecasting.

If you would like your students to know how to work with data in Excel, the lesson plans help you understand how your students should use the provided handouts. The lesson plans are only suggestions and you can give your students the handouts to use on their own without actually spending time going through them in class.

Lesson Plan: Practice Data Entry

Materials

Practice Entering Survey Data in Microsoft Excel
Sample Excel Spreadsheet
Coding Practice

Agenda

1. Begin the lesson by telling students that they should all have their own working computer and that they should be sitting around the other members of their group. Tell students that they all need to learn how to use Excel and contribute to the survey data section of the project.
2. Explain the basic layout of Excel Spreadsheets:
 - Excel Spreadsheets look like this...
 - Columns and Rows
 - Each row (1,2,3,...) corresponds to a survey (except for row #1 which is the heading row)
 - Each column (A,B,C,...) corresponds to a question
3. Students should then be directed to complete the “Practice Entering Survey Data in Microsoft Excel” worksheet in their workbook. Their spreadsheet should look like the “Sample Excel Spreadsheet” when it is finished.
4. Ask students to complete the “Coding Practice” either at the end of class or before the next class meeting.

Practice Entering Survey Data in Microsoft Excel (s)

Use the simple survey results on the back of this sheet to practice entering data in an Excel spreadsheet.

Some Notes:

- Headings should always be in all capital letters, bold, centered and should not have spaces between letters.
- When data is entered in the spreadsheet, it is always abbreviated, never entered entirely. “Coding” answers is done to simplify the data entry process. When you code answers you assign a number or letter value for all potential answers to questions.
- In order to keep track of survey data, every survey needs to be Identified so that you can tell each one from the others. Surveys should be labeled with the surveyor’s initials and numbered starting with 01,02,03...

After you have created a spreadsheet that is identical to the one on the back of this page (except with different ID initials: yours!):

1. Save this Excel File as your last name + PIG1 on the hard drive of the computer.
2. Turn in a print out of your spreadsheet and save the file on the computer.
3. Remember which computer you used!!!

Sample Excel Spreadsheet (s)

ID	GENDER	BOROUGH	SCHOOL
FL01	0	1	1
FL02	1	3	3
FL03	1	3	2
FL04	1	4	3
FL05	0	5	3
FL06	0	3	2
FL07	0	2	1
FL08	1	1	1
FL09	1	2	2
FL10	1	3	3
FL11	0	1	1
FL12	1	2	3
FL13	1	3	1
FL14	0	1	3
FL15	1	1	3
FL16	1	2	3
FL17	0	1	4
FL18	1	2	3
FL19	1	1	1
FL20	1	2	2

Lesson Plan: Data Entry

Materials

Sample Coding

Agenda

1. Students should be asked to sit together with their group and decide what their headings and answer coding scheme will be for their survey data. They should look at the Sample Coding handout to get an idea of what their coding should look like. This should be typed by one group member and printed for each member of the group.
2. Each group member is responsible for then working individually at his or her own computer. They need to enter the data for each survey they conducted (at least 20 each). Eventually, this data is going to be combined into the one Excel file (by YOU most likely) for every group to have one set of group data. It is very important that every member of the group uses the same headings and coding scheme so that there are no screw-ups with the data.

Sample Coding (s)

Your coding should look something like this:

Question #1: GENDER

What is your gender?

0 = female

1 = male

9 = blank

Question #2: BOROUGH

What New York City Borough do you live in:

1 = Bronx

2 = Brooklyn

3 = Manhattan

4 = Queens

5 = Staten Island

6 = I Do Not Live in New York City

7 = No Answer

9 = Blank

Question #3: SCHOOL

How long does it take you to get to school?

1 = Less than 15 minutes

2 = Between 15 and 30 minutes

3 = More than 30 Minutes

4 = No Answer

9 = Blank

Lesson Plan: Creating PivotTables

Materials

Creating PivotTables
Sample PivotTables

Agenda

1. Now that all of their data has been entered, every student needs to use the PivotTables and Sample PivotTables handouts to create pivot tables from their own personal data.
2. Remind them to be patient. This process is sometimes frustrating and will take them a long time to do.
3. At the end of this lesson every student should turn in 3 pivot tables to their Intern as proof of their work.

Creating PivotTables (s)

PivotTables summarize the data entered into a spreadsheet.

Once you have entered all of your data from your surveys you need to analyze it. One way to analyze your survey data in Excel is with PivotTables. PivotTables summarize the data in the spreadsheet. At first you might think it is easier to use a calculator and figure out the percentages yourself. However you will soon discover using PivotTables lets the computer do all the calculations for you. The more surveys you have, the more time you will save. Below are the steps for making a PivotTable. Remember that reading instructions about using Excel will not help as much as practicing and working with it.

1. Go to the menu called **DATA**.
2. Under **DATA** select **PivotTable...**
3. Select **MICROSOFT EXCEL LIST OR DATABASE** and click **NEXT**.
4. The **RANGE** is the location of the data you want to analyze. Select all of you data by highlighting it with the mouse. **BE SURE TO INCLUDE THE COLUMN HEADINGS!!!** Click **NEXT**.
5. Select the *Heading* of the question you want the table to analyze from the buttons that appear on the right hand side. Drag it to the **ROW** area.
6. Drag the same *Heading* into the **DATA** area.
7. Next left click on the **HEADING** in the **DATA** area.
8. **SUMMARIZE BY: "Count of..."**
9. Click **Options>>** and **SHOW DATA AS: "Percent of Column"**
10. Click **NUMBER** and change **NUMBER OF DECIMAL PLACES** to **"0"**. Click **OK** an go back to the PivotTable Wizard. Click **OK** to Insert the PivotTable on the worksheet.
11. Fill in the **Responses decoded**. For example, change **"1"** to **"Bronx"**, **"2"** to **Brooklyn"**, **"3"** to **"Manhattan"**, **"4"** to **"Queens"**, and **"5"** to **"Staten Island"**.

Sample PivotTables (s)

AFTER STEP 10:

Count of BOROUGH	
BOROUGH	Total
1	35%
2	30%
3	25%
4	5%
5	5%
Grand Total	100%

AFTER STEP 11:

Count of BOROUGH	
BOROUGH	Total
Bronx	35%
Brooklyn	30%
Manhattan	25%
Queens	5%
Staten Island	5%
Grand Total	100%

Lesson Plan: Making Graphs

Materials

Workbook Graphs

Agenda

1. Now that your students have their data entered and their pivot tables created, please invite them to follow the directions on the Making Graphs handout to make graphs out of their individual survey data.
2. Students will work individually to finish their graphs and should have at least two finished by the end of the class.
3. Once students have completed all of their graphs they should wait for the other members of their group to finish. This is a good time to encourage students to help and teach each other what they know about using Microsoft Excel.
4. Finally, when all of the students in a particular group have finished with their graphs, their data needs to be combined from all their individual computers to one single file in one computer. Also, save what is on that one computer to a disk for the group to use outside of class if they need to.
5. At the conclusion of this process, every student will have entered data, made pivot tables, and made graphs.

Making Graphs (s)

Graphs are a visual report of the information gathered through your surveys.

Remember: Simple, easy-to-read graphs are much better than complicated graphs. The more basic the design of your graph is, the easier it will be to read and understand. Follow these steps to make a simple column graphs from the data in your PivotTables.

NOTE: THESE INSTRUCTIONS ARE FOR THE VERSION OF MICROSOFT EXCEL USED ON THE COMPUTERS AT LEADERSHIP. IF YOU USE A DIFFERENT VERSION THE STEPS MAY BE OUT OF ORDER OR SLIGHTLY DIFFERENT.

1. Go to the menu called **INSERT**.
2. Under **INSERT**, select **CHART---ON A NEW SHEET**
3. Highlight the PivotTable that contains the data you want included in the graph.

Be sure to highlight the **Data** and the **Labels** you want to include. Most of the time, you do not want to include the Grand Total data.

Count of BOROUGH	
BOROUGH	Total
Bronx	35%
Brooklyn	30%
Manhattan	25%
Queens	5%
Staten Island	5%
Grand Total	100%

4. Choose the “**Chart Type**” column. Create a column graph.
5. “Data Series” should be in **Columns**.
6. In most graphs a **legend** is not necessary. Remove it if it appears.
7. For the **TITLE** of the Chart: Enter the *Question* from your survey the graph and PivotTable are based on.
8. For the **X-AXIS** of the Chart: Enter the *Response Category* Label. This should be a word or label that describes all of the potential responses. In the example we use the word “**Borough**”.
9. For the **Y-AXIS** of the Chart: Enter “**Percent of Respondents**”

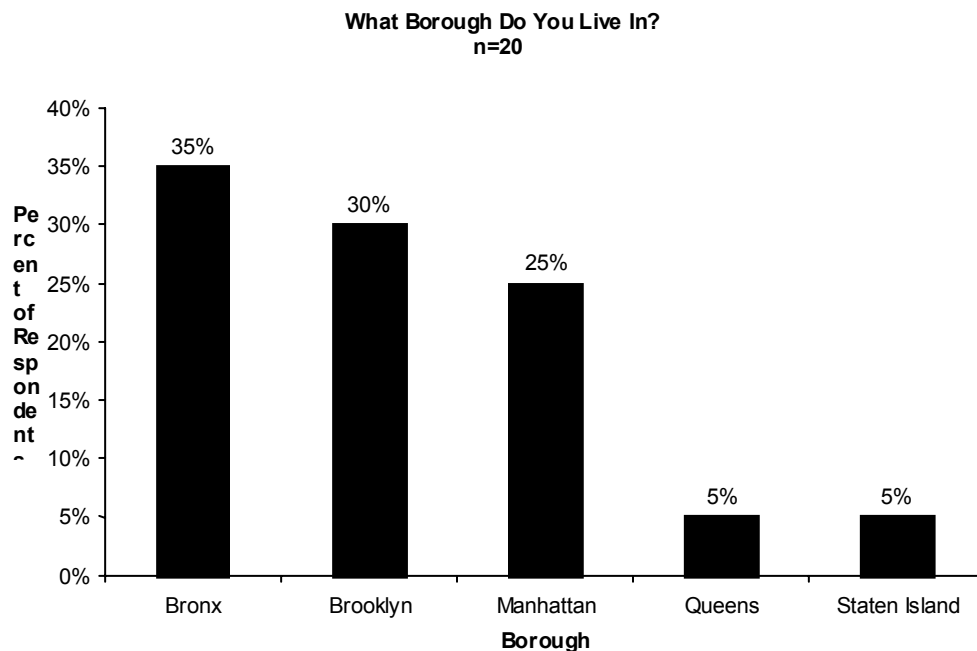
10. Click **FINISH** and your Graph should appear on a new sheet.

11. Now that your graph has appeared you should do a few things to make it easy to read. Here are several tips:

- Right click the mouse inside the graph area and click “**Insert Gridlines**” ...Remove all gridlines (uncheck all of the boxes). Click **OK**.
- Right click the mouse inside the graph area again and click “**Insert Data Labels**”. Mark the “Show Value” box and click **OK**. This will write the actual percentage value above each column in the graph.
- Right click the mouse inside the graph area again and click “**Format Plot Area**”. Select “**None**” under “**Borders**” and “**None**” under “**Area**”. Click **OK**.
- Right click the mouse inside one of the **COLUMNS** in your graph and click “**Format Data Series**”. Under the “**Patterns**” heading change the “**Area**” color to **Black**. Click **OK**.

12. Finally, LEFT click the mouse on the **CHART TITLE** (the question). Put the cursor at the end of the question (to the right of the ?) and type **ENTER**. Underneath the question you should type n= _____. In the blank you should enter the number of people *who answered this question on the survey*. This is a very important step. If you do not include this number, someone looking at your graph will not know what any of the percentages mean.

After completing all of these steps, your chart should look something like the one below. If it does not, go through the steps again and see if you missed something or ask an intern or the teacher for help.



Microsoft PowerPoint Tutorial

**The following materials are provided here for Microsoft PowerPoint:
Guidelines for Using PowerPoint**

There is **no lesson plan** for Using PowerPoint. If you choose to teach PowerPoint during class, you should just monitor your students as they go through the instructions on the handout.

Guidelines for Using PowerPoint (s)

Microsoft PowerPoint allows you to present your information visually to an audience. Learning this program is a valuable tool you can use in high school, college, or in your own job. PowerPoint creates professional looking presentations that will impress your teachers and future employers. PowerPoint takes information you input and formats it into flashy slides that present your material in a clear and organized manner. The following instructions give you an idea of how to begin using PowerPoint.

To Make a PowerPoint Presentation:

1. Click **Start** → click **Programs** → click **Microsoft PowerPoint**
2. A dialogue box will appear, click on **blank presentation** → click **OK** → another box will appear giving you layouts for your first slide → click on the layout titled **column text** → click **OK** → the layout of your slide will appear (the layout should be the same as the one below).
3. First, click on the box titled **Click to Add Title** → type in **Benefits & Costs of Preferred Policy**
4. Select the first column by simply left clicking on the area titled **Click to Add Text** → press backspace to delete the existing bullet → then type in **Benefits** → press **ENTER** → click on **Format** → click on **bullets and numbering** → select the solid black bullets → press **OK**
5. Begin to type in **Provides immediate and stable housing** after the first bullet → press **ENTER** → then type **Provides necessary job skills** after the second bullet → press **ENTER** → then type **Helps homeless people deal with personal issues** after the third bullet
6. Select the second column by simply left clicking on the area titled **Click to Add Text** → press backspace to delete the existing bullet → then type in **Cost** → press **ENTER** → click on **Format** → click on **bullets and numbering** → select the solid black bullets → press **OK**
7. Begin to type in **The financial cost placed on the Department of Homeless Services** after the first bullet → press **ENTER** → then type **Could take away from other effective and necessary services** after the second bullet → press **ENTER** → then type **The general public may become irritated** after the third bullet
8. Make sure that both of your columns (**Benefits & Costs**) are each the same font size and are closely in alignment with one another. If they are not in alignment with one another left click the mouse on the appropriate column → then left click the mouse on the small, white square located at the top-center of the dashed box → still holding the left mouse down **drag** the square upwards or downwards to align it with the other column text

9. Your first PowerPoint slide should look something like the one below....

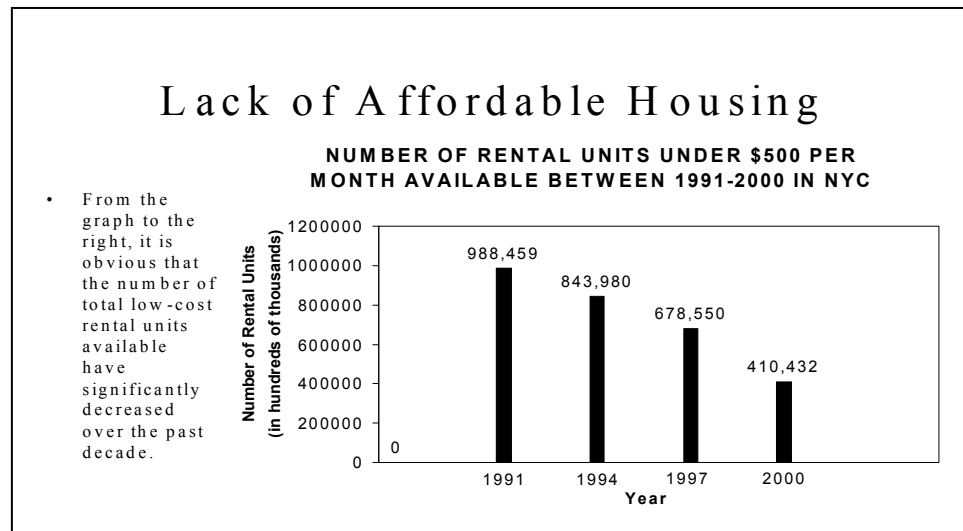
Benefits & Costs of Preferred Policy

Benefits <ul style="list-style-type: none">• Provides immediate and stable housing.• Provides necessary job skills.• Helps homeless people deal with personal issues.	Costs <ul style="list-style-type: none">• The financial cost placed on the Department of Homeless Services.• Could take away from other effective and necessary services.• The general public may become irritated.
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To Create a New Slide and Insert a Graph into a PowerPoint Presentation:

10. Go to and click **Insert** → click on **New Slide** → select the **Text & Chart** layout → click **OK**

11. To insert a graph you already created in EXCEL, simply highlight the data you entered from EXCEL → then right click the mouse and select **Copy** → revert back to PowerPoint and double click on the **graph area** → a sample spreadsheet should appear → place the cursor in one of the **cells** → right click the mouse and select **Paste** → move your graph into the space you want it by left clicking the mouse and **dragging** accordingly → your resulting graph should look something like this...



12. Now you can make a presentation to present your societal problem and policy solution.

Public Policy Glossary

The following glossary is organized by chapter in the Public Policy Skills book instead of alphabetically. Many of the words are actually found in the book but some are additional terms. These words are also related to each chapter and are important to know when speaking in public policy terms.

Chapter 1 – A Framework for Public Policy Analysis and Action

Societal problem: A societal problem is when some aspect of our society fails to meet one or more of the six societal goals.

Societal goals: These relate to the three main principles found in the Declaration of Independence: life, liberty, and the pursuit of happiness. There are two societal goals for each of these principles and these are rights granted to every member of society. These goals are: good health and personal safety (life), free expression and free choice (liberty), and economic opportunity and clean environment (pursuit of happiness).

Public policy: An actual or proposed government action intended to deal with a given societal problem.

Geographic level: The government level at which a societal problem exists and at which government action needs to be taken to ameliorate the problem. The four geographic levels are: Local (school, village, town, city, or county), State, National, and International.

Legislation: The legislative aspect of public policy establishes guidelines to be followed by members of the society.

Administrative acts: Administrative acts are what government do to put a law into practice.

Judicial decisions: Judicial decision take place when courts apply the law to a specific situation.

Player: A player is an individual, group, or institution who works to influence public policies. These people can be elected official, organized groups, or private individuals who actively seeks to shape public policy. Players usually have an invested interest in either the specific public policy or the societal problem it addresses.

Stakeholder: Sometimes referred to, lovingly, as a dog, a stakeholder is any individual impacted by a policy. All players are stakeholders but not all stakeholders are players.

Chapter 2 – Using the Library

Abstract: A type of index which provides brief summaries of articles.

Almanac: A resource providing both statistical and general descriptive information.

General Index: An index covering a large number of periodicals on a variety of subjects.

Periodical: A publication that is regularly issued – also known as a Magazine.

Chapter 3 – Using Surveys

Client: An individual, agency, or organization that will benefit from information provided through research and analysis.

Purpose of a survey: The information your client wants to gain from the population you are surveying.

Factual information: Actual information that can be measured.

Attitudinal information: Information that indicates how people feel and what they think about social conditions or about public policies designed to deal with those conditions.

Target population: The entire group of individuals about whom you want to gather information.

Sample size: The actual number of responses to your survey you receive.

Sampling frame: The total number of individuals that you contact from some list of other source of potential respondents.

Confidence interval: It gives you an estimate of how close the findings generated by the sample would be to the findings if every single member of the target population were surveyed.

Non-random sampling: A procedure in which subjects are not selected by chance.

Response rate: The percentage of your target population who will respond to your survey depending on your method of contact.

Closed-choice questions: Questions that provide a limited selection of answers the respondent may give on a survey.

Open-ended questions: Questions which allow respondents to answer in their own words.

Chapter 5 – Describing the Problem and Identifying Its Causes

Evidence: Information that documents the existence of undesirable societal conditions. Types of evidence include: statistics, views of experts, examples and case studies.

Chapter 6 – Formulating a Position on a Public Policy Issue

Effectiveness: The degree to which the policy will have the desired impact on the societal problem.

Feasibility: The likelihood of the policy being implemented by the related players.

Chapter 7 – Examining the Benefits and Costs of a Policy

Benefits: Desirable consequences of a policy resulting from the action. These can be both intended and unintended results.

Costs: Undesirable consequences of a policy resulting from the action. These can be both intended and unintended results.

Benefit/cost ratio: The ratio between the benefits and costs of a policy, based on a numerical ranking system.

Chapter 8 – Forecasting the Effect of a Policy

Forecasting: A prediction about a societal condition or the societal problem. Baseline forecast uses historical information about the societal problem and predicts how that problem will progress if no public policy action is taken to ameliorate it. A policy forecast predicts the condition if a public policy action is taken.

Chapter 9 – Forecasting Implementation with the Prince System

Prince system: A method for forecasting the chances that a policy will be implemented.

Issue position: Whether a player supports, opposes, or is neutral towards a proposed public policy.

Power: How effective each player is in blocking the decision, helping to make it happen, or otherwise affecting the implementation of a public policy.

Priority: How important the decision is to each player.