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Bridging the Divide: The Casework Policy Link

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The professional history of social work in the United States of America is entering its second century. From this vantage point, it is possible to draw on the past to develop ideas that will work for the future. Contemporary social workers often view the profession as dichotomized between those who deal with individual issues through counseling and private practice and those who are concerned with social change through policy reform. Mary Richmond, pioneer in the professionalization of social casework, offers a tightly integrated model which demonstrates how social casework and social reform can serve to reinforce and support one another for the betterment of society. This model, generally utilized by the COS, was developed in the late nineteenth century and honed in the early twentieth century. It is relevant for today, and has implications for unifying the profession.

The professional history of social work in the United States of America is entering its second century. From this vantage point, it is possible to draw on the past to develop ideas that will work for the future. Contemporary social workers often view the profession as dichotomized between those who deal with individual issues through counseling and private practice and those who are concerned with social change through policy reform. Specht and Courtney [1994] go so far as to refer to social workers as "unfaithful angels". This refers to the fact that a disproportionate percentage of social workers today serve neither the poor nor broader community interests. Instead they have opted for the relatively lucrative arena of private practice which cares for the poor only insofar as medical assistance and other social programs are willing to pay the fees. Thus, with this exception, most social workers in private practice focus their skills on the middle and

upper classes who can afford their services. This fact adds impetus to the perceived dichotomization of the profession. However, social problems are no respecters of economic or social class. The "social isolation of the aged, the anomie experienced by youth, the neglect and abuse of children, . . . drug addiction, and the problems of those who suffer from AIDS" [Specht and Courtney, 1994, 27] affect all groups in society, although are often over represented among those who live on the margins of society,

Further, this dichotomy between social workers in private practice and those concerned with social reform has roots in the early professional history of social work, in the perceived differences between the Charity Organization Societies [COS] and the Settlements through a misreading of the professional history of social work. This erroneous historical view postulates that the settlements were active in social reform and societal change while the COS agencies merely dispensed charity, a grudging charity at that. John Boyle O'Reilly, Boston poet and reformer, expressed a common view of the COS held by its critics: "The organized charity scrimped and iced, In the name of a cautious, statistical Christ." [Trattner, 1994, p. 99].

Instead, the historical facts point to a model which contradicts this common error and shed considerable light on the linkage between casework and policy in the past. These ideas are still useful in today's climate. Casework and social reform continue to be necessary to each other's success. Mary Richmond, prominent in the development of social work as a profession, described this relationship clearly when she stated: "The connection between it [casework] and the larger social reforms must be very close; however, if the two become permanently divorced, neither is very well done." [MERA, Richmond to Spofford]

Given the current national climate and political reality, there is real need for all who are interested in the general social welfare to work together, whether private practitioner, policy analyst, community organizer, or public agency staff person. If social work as a profession is to be successful in achieving social change, all professional organizations to which social workers belong also must work together for the common good. Too often, each organization works for a very limited set of interests which have more to do with the separate agendas of segments of the profession

than with the needs of society. Few would argue that the poor have become poorer, that racism and discrimination still exist, that there are tremendous disparities between the rich and the poor, or that the effects of sexism are still experienced. Many also voice concern over the potential breakdown of the intergenerational compact of which the issues surrounding social security are prime exemplars. Obviously, there is a broad societal need for an agenda for social reform which social work, as a profession, is uniquely qualified to spearhead. Unfortunately, much of our professional energy for the last quarter of the 20th century has been squandered on quarreling amongst ourselves about the direction in which the profession is heading. To counteract this tendency, we need to look outward at enormous problems affecting human beings, and return to our original professional focus, the improvement of social conditions. As a profession, we need to find some models which will help us bridge the partitioning of social casework and social change efforts. History provides us with such models. Both practicing professionals and social work educators need to revisit this history in order to reforge strong linkages between the various interest groups within the profession.

Mary Richmond, pioneer in the professionalization of social casework, offers a tightly integrated model which demonstrates how social casework and social reform can serve to reinforce and support one another for the betterment of society. This model, generally utilized by the COS, was developed in the late nineteenth century, honed in the early twentieth century, is relevant for today, and has implications for unifying the profession. Richmond's model, which intuitively incorporated social systems theory and eco systems theory, utilized a data based approach to social reform. The efforts of all who are interested in social reform were incorporated into this model. The data which is an integral part was not the parsimonious data gathered in surveys, nor mapping data gathered by the residents of Hull House, although these are also useful, but the richly anecdotal data which comes from carefully compiled case records. Because of its richness, this anecdotal data is extremely useful in molding public opinion and in shaping the consciences of council members and legislators on all levels. Richmond's years in Philadelphia during the first

decade of the 20th century serve as a well documented example of her model.

THE MODEL

Richmond's model of social reform is illustrative of the way in which her agency, the Philadelphia Society for Organizing Charity [SOC], as well other charity organization society agencies in general pursued needed reforms.

The following schema makes this model easier to visualize:

Stage 3

8. use of casework to provide policy effectiveness data
7. choice of person[s] to present and follow legislation through to enactment

Stage 2

6. drafting of model legislation and writing of sample letters of support to furnish supporters
5. sharing information with others locally and nationally who share a common interests
4. reviewing efforts at reform done elsewhere and building on these efforts

Stage 1

3. working together with other local or state agencies who are interested in the problem
2. community education through dissemination of data gathered through casework
1. compilation and organization of data gathered through casework

Precondition

social workers as active and concerned citizens in personal as well as in professional life

This model avoided the pitfalls described by Florence Kelley, a reformer of the era, as characterizing much legislation of the progressive era. Kelley stressed that reforms which were embodied in hastily framed bills, drawn by those who had little practical experience with the conditions they were trying to correct, were often less useful because they did not fit the case or because too few were interested in their enforcement. [MERA, Kelley to Richmond, 1906]

The compilation and organization of the data through thorough, well documented casework comprise the first level of the model. A second level in the model utilized SOC Board and community education through dissemination of the data to the appropriate persons in order to gather wide ranging support for a reform effort. A third section of the model consisted in working together with other agencies towards reform. A fourth part consisted in reviewing efforts made elsewhere, and building on those efforts. A fifth segment had to do with national and local information sharing among agencies through letters and conferences. The sixth element of the model had to do with drafting model legislation and letters of support to furnish those who would actively seek to obtain passage of this legislation. The seventh level of the model had to do with the selection of the influential person or persons to present the proposed legislation to the legislature. The eighth portion of the model is the use of data gathered from casework to evaluate the effectiveness of the policy. Finally, the ninth piece of the model, actually a precondition to its success, had to do with encouraging social workers to carry a professional interest in social reform into personal life by becoming active and involved citizens. This gave social workers community credibility as persons interested in the well being of the community in other areas outside of the immediate area of their own interest, as well as a first hand knowledge of the political alliances within the community.

WIFE DESERTION AS A CASE EXAMPLE OF THE USE OF THE MODEL

Let us now examine how Richmond's model of social reform functioned through an examination of the agency's work

on the wife desertion bill. The first stage of Richmond's model utilized good casework to provide data related to the problem to be compiled and organized. Record keeping in the SOC under Richmond had a double importance: to document problems and to serve as an evaluation of the effectiveness of the solution. COS agents gathered specific information on the real causes of social problems involving poverty and dependency using the inevitable tendency of scientific charity with its individualistic orientation to emphasize the objective and factual rather than the deductive, discretionary approach to social issues. When, as cases of dire need were reviewed by the Philadelphia SOC, it became apparent that the issue of wife desertion was a contributing factor to the desperate poverty in which many families found themselves, Richmond supplemented the anecdotal evidence from her agency with further empirical evidence. This evidence, in the form of statistics drawn from a study of 211 families of deserters under the care of the SOC carried out by a board member who was then an M.A. student at Bryn Mawr, gave greater credibility to the need for reforms in this area. [Philadelphia SOC, Annual Report, 1903]

Then, illustrating the second and third steps of Richmond's model, the SOC began education of board members, other agencies, and community leaders through dissemination of the data to gain support for a reform effort. Richmond also pointed out the educational effectiveness of more affluent and influential community members having direct and personal contact with those suffering from the effects of the problem through volunteer work [friendly visiting]. "It all comes back to personal contact with and interest in the least fortunate of our citizens. Unless the comfortable classes can be made really to care, things are not going to get very much better." [SOC Annual Report, 1904, p. 20] In fact some of the anecdotal data gathered through the use of "friendly visitors" was utilized in the education process. Another use of the "friendly visitor" beyond offering direct assistance [although not dispensing alms] to individual clients was equally important. These women's experiences served to acquaint husbands, brothers, and fathers possessing both political and financial power as well as other affluent members of the region with the social problems of the community so that they were more likely to support efforts towards reform.

The fourth and fifth stages of the model, reviewing efforts made elsewhere, interagency cooperation, and sharing information, were shown in the interactions between the Boston Associated Charities and the Philadelphia SOC around the issue of wife desertion. Richmond and a key staff member of the Boston agency shared information about the problem and the ways in which the problem was handled in each area.

The sixth and seventh stages of the model were demonstrated by the formation of a SOC Board Committee, empowered to study the evidence and to suggest legal remedies. This group, under Richmond's guidance, drafted a model act to be submitted to the Pennsylvania legislature. This, in addition to the close supervision given to the bill by another Board member, Owen J. Roberts, as it made its way through the legislature, was successful in securing the passage of an act making wife desertion and non-support a misdemeanor, "punishable with a year's imprisonment and a hundred dollar fine, either or both." [SOC Annual Report, 1902,1903; MERA, Higgins to Richmond, Nov. 1902] The ninth part of the model was the use of data gathered through casework to demonstrate the effectiveness or lack thereof of the policy.

Wife desertion, of special interest to Richmond throughout her long career, provided a case example of the COS reform endeavor and Richmond's model. Richmond utilized the support of her board and rallied community supporters to accomplish the passage of the legislation. She herself did not go to the state capital to see the proposed legislation through the process; instead a lawyer member of the Board was delegated to do so, at Richmond's suggestion. Richmond's role was to lobby for support for the bill, utilizing statistics gathered in case work to support the need. Once the bill was passed, statistics gathered in case work investigations were employed to evaluate the effectiveness of the bill. The Committee on Wife Desertion of the SOC continued to serve primarily to monitor the effectiveness of the legislation previously passed.

Richmond's model, based on empirical evidence, both statistical and anecdotal, has real relevance for today. To utilize the rich material gathered through painstaking casework in a way which causes the problem to wear flesh and bones and breathe, to aggregate the data to present statistics which will convince policy

makers of the need for reform, to organize and mount a successful campaign to see the legislation become reality, and then to use case work as a way to evaluate the outcome of the legislation is as useful today as it was nearly one hundred years ago. With the use of this model, the needs of both the individual and of society as a whole are met, and those in social work who are caseworkers or therapists and those who are policy analysts and community practitioners find common ground.

THE SOCIAL WORKER AS COMMUNITY CITIZEN

The ninth stage of the model is actually a parallel piece as well as a precondition for the effectiveness of the rest of the model. This stage has to do with the social worker as community citizen. This involves encouraging social workers to take the professional interest in social reform demanded by the NASW Code of Ethics into personal life by becoming active and involved citizens in their community. During her tenure at the Philadelphia COS, Richmond demonstrated this point clearly, through her work and that of her able lieutenant, Helen Foss, in the Women's Committee for the City Party, the first organization of women in politics in Philadelphia.

Turn of the century Philadelphia was marked by a level of governmental corruption which was deservedly legendary. [Bowden, 1937, Edmonds, 1906] The Women's Committee, reflecting the national progressive trend toward municipal reform, was a part of a coalition of groups that worked toward "good government" though orchestrating the defeat of a corrupt groups of local politicians. Richmond and Foss accepted chairships in this committee. Richmond, in order to allow Foss time and energy to work in this endeavor, picked up a share of Foss' load as a COS employee. Thus when Richmond encouraged the SOC to sponsor a public meeting on upcoming charitable legislation in June of 1905, not only did 180 charity workers attend the meeting in addition to other progressive reformers, but this forum was one of the key pieces in uniting Philadelphia progressives. The result was that a special session of the legislature was called, and a number of political reform measures sought by Philadelphia progressives were passed. [Central Board Minutes, 15 May and 19 June, 1905].

Because of Richmond's and Foss' work with the women's committee, they were well linked into the political reform network in Philadelphia, they had credibility, and when the SOC sponsored a forum, it was considered worth supporting as a part of the total reform movement.

CRITERIA FOR LEVEL OF INVOLVEMENT AND CHOICE OF ISSUES

Richmond's model has other useful lessons for today's social workers. One caveat that undergirded the use of this model for Richmond was to pick carefully the reforms in which her agency would take the lead role. One criterion that Richmond used was related to the mission and purpose of other agencies in Philadelphia, and to the scope of their efforts. In other words, Richmond considered the total charitable picture in Philadelphia. Other criteria involved the choice of social reform activities which were an outgrowth of the case work activities, could be based on data already secured in the practice of the normal work of the agency, and although a private trouble for one family, were an example of a social problem in the community. Other criteria involved the magnitude of the task and the likelihood of success. Still other criteria involved the scope and magnitude of national efforts.

The work of the SOC in the arena of tenement reform serves as an example of the application of a number of these criteria. Although tenement reform was much needed in Philadelphia, the SOC did not involved itself directly in tenement reform, largely because of the activities of the Octavia Hill Association [OHA]. However, the SOC did support the legislation sponsored by the OHA. Under Richmond's guidance, the SOC mounted a systematic effort in a detailed approach to lobbying for the "Dearden Bill to Regulate Tenement Houses". Richmond and the other Board members of the SOC sent letters asking for support for the bill to a number of prominent persons and organizations, including attorneys, wealthy manufacturers and merchants, business firms, clubs, other reformers, and other social agencies and to her personal friends. The volume of correspondence involved in this formal attempt at lobbying was impressive. Each person was

furnished some sample arguments to use in support of the bill along with the list of legislators each was supposed to write. Many reported back to the SOC, enclosing a copy of the letter as they revised it, and reflecting the answers they received. [CBM, 1907, SOC Correspondence, 1907]. The bill was successfully passed. This sort of organization and support for causes sponsored by others also was reciprocated to the SOC when needed.

In this instance, the SOC did not gather empirical data or supply anecdotal evidence in support of this bill, nor did it establish a board committee to monitor the effects of the legislation. The criterion here was that this issue was the purview of the OHA. As powerful as the support offered to the OHA was, this did not require nearly the resources from the SOC necessitated by the wife desertion legislation. The view here on Richmond's part was that wife desertion legislation reform was linked integrally to the mission of the SOC, while tenement reform legislation was linked in the same way to the mission of the OHA. Thus, it was appropriate for the SOC to assist the OHA in its struggle with support, but it would not be appropriate for the SOC to take a front line position in the fight. The lesson for modern social work professionals is to choose front line involvement in reform efforts tied to agency mission and purpose. For other reform efforts, it is more sensible to offer support in the way that the SOC did for the OHA. This way no agency squanders its community credibility by spreading its efforts over too large a field, or exhausts its human capital, yet the needs of the community are met.

Another example of careful selection of level of involvement in a problem was related to the need for reform in many areas of social problems in Philadelphia. The criteria used in this instance by Richmond to determine the level of agency involvement had to do with the magnitude of the task and with the wide range of areas of need for reform, from drainage and overcrowding, to child labor. The scope of the effort was far too great for one agency to tackle. In this instance, Richmond employed a cooperative venture with the Associate of Collegiate Alumnae which was published as the 1904 SOC Annual Report on the Multi-Faceted City of Philadelphia. The reasoning behind this use of the SOC's annual report was to make powerful and influential persons aware of the magnitude of Philadelphia's problems and

to secure support from a variety of organizations and individuals for reform efforts to be passed by the city government. In this way, as Richmond called attention to the powers of the city government to bring about reform, she was not over committing the SOC's resources to the problems nor expecting the SOC to spearhead the solutions. Instead, she was calling Philadelphia's attention to the responsibilities of local government: "No city need be helpless about bad drainage, or overcrowding or child labor. It has the power to regulate sanitation and housing conditions; it can prevent the exploitation of child labor by ignorant parents." [SOC Annual Report, 1904, p. 2] Richmond raised the issues to a group who already had an interest in social issues, those on her information dissemination list, and then let those who could, influence city government to make changes. For the SOC to involve itself more directly would not have accomplished the task any more effectively, would have been source of agency frustration, while diluting the resources of the agency to carry out its mission.

The issue of child labor law reform illustrated another criterion, the scope and magnitude of national efforts. Richmond interested her board in this effort as a part of the work of COS agencies nationally. COS agencies joined with a variety of other agencies, guided by the Consumer's League and state and national Child Labor Committees in an effort to achieve legislation in this area. Florence Kelley, who in the 1890s had worked at Hull House on issues affecting employed women, was now the executive director of the Consumer's League and the National Child Labor Committee. She served as the coordinator and national clearinghouse for information. Kelley provided Richmond with practical help in achieving the necessary legislation in Pennsylvania. She conveyed to Richmond that Pennsylvania was behind the national norm in a number of respects: the age for beginning work was 13; children could work all night; children were not required to be able to read or write in English; the unsubstantiated word of the parent was used to determine the child's age, and there were more children in Pennsylvania who could not read than there were in New York, Maryland, or West Virginia. Kelley also suggested possible legislative reform goals which were in keeping with the tenor of the times and stood a reasonable chance

of success: raise the work age for beginning work to age 14; ban night work for children under 16; require children to be able to read and write before beginning work; require substantiation of the child's age through independent documents; and to require school attendance through the full school term to the 14th birthday. [MERA, Kelley to Richmond, 1906]. Kelley's suggestions point out the importance of lobbying for what is likely to be accomplished, rather than having goals which are so lofty they have little chance of success.

In this instance, Richmond and the SOC joined with the national efforts to reform child labor laws. Model reforms were circulated on a national basis, and the SOC did not need to reinvent the work, but simply adapt it to local situations. In this national effort, most social reformers, whether settlement house workers or COS, came together, each contributing efforts to a common cause. The effort was also part of the work of the National Conference of Charities and Corrections [NCCC]. Richmond had agreed to speak on child labor at the 1907 NCCC. Although not included in the NCCC Proceedings, her paper was reprinted in the journal of the COS group, *Charities*, and her ideas achieved a even wider circulation. [MERA, Kelley to Richmond, 1906].

Concern over the employment of children linked nearly all Progressive reformers. Some, like Florence Kelley, Julia Lathrop and Grace Abbott, were nationally known reformers. Others, like Mary Richmond, played a less public role, providing data, campaigning for state laws, and furnishing agency assistance in the enforcement of these laws, as well as campaigning for new members and new funds for the cause within their own locality. The important lesson for the social work profession today is that these reformers, whatever their orientation, conservative or liberal, settlement or COS, church connected or secular, put differences in perspective and orientation aside and concentrated on the business at hand, the safety and well being of children. Each did the tasks most suited to his/her orientation and perspective, and kept the focus on their common cause rather than on their differences. Because they shared information, resources, and support, while presenting a united front strong enough to withstand powerful entrepreneurial forces and the greed and ignorance of poverty stricken parents, they were able to secure

passage of important legislation. There is a powerful lesson in this message for today's social workers.

CONCLUSION

Casework and social reform are necessary to each other. The success of one relies on the success of the other. Policy advocates and social change advocates need both the rich anecdotal evidence and the statistical aggregated data provided by the case workers in order to educate the broader community and to lobby policy makers effectively. For lasting change to occur in clients' lives, case workers need both policy change and a shift in the values of the dominant culture. The success of reform efforts is demonstrated through the feedback of casework. The necessity of reform efforts is also demonstrated through the feedback from caseworkers about social conditions and the need for policy change in certain areas. The experience of Richmond with the COS model demonstrates that the expertise and support of all social workers are important input in the formation of social policy. The thrust of one's professional practice is not the issue; the depth of the commitment to social work principles is demonstrated in other ways. Case work, that is, individual practice, and legislative advocacy and community practice are reciprocal processes in which each are necessary to the achievement of social change. At the threshold of the new century, modern social workers need to follow the example of the social workers of the COS and the settlements nearly a century ago, as they collaborated and cooperated to achieve the common weal. Through the use of the Richmond model, case workers were able to give reformers the data need to carry the day, as well as allowing both those early social workers focused primarily on reform and community members and legislators who needed to be convinced to be convinced of the need for reform to hear and understand the clients' plight, often in their own words. Those advocating legislative change need to draw on the rich data sources of the modern case workers, whether in private or agency based practice. This data yields a picture of human need that is otherwise lacking and provides feedback about the efficacy of legislative remedy. It makes good sense to return to a tested model which is timeless in its application. The

use of Richmond's model provides a tool which not only bridges the work of policy advocate and caseworkers in the beginning of this century, but provides modern social workers of all job descriptions with the tools they need to bring about social change in the next millennium.

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