

# MINDING THE GAPS AND CHALLENGING THE CHANGE IN SOCIAL WORK



*Edited by  
Agnieszka Naumiuk*



**MINDING THE GAPS  
AND CHALLENGING  
THE CHANGE  
IN SOCIAL WORK**

# MINDING THE GAPS AND CHALLENGING THE CHANGE IN SOCIAL WORK

International Research  
in Poland under  
Erasmus Mundus  
ADVANCES



*Edited by*  
*Agnieszka Naumiuk*



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## Foreword

This publication is a collection of original research in the field of social work, done in Poland between 2015 and 2019. Most of the authors stayed in our country for a period of about 6 months, studying various areas of socio-educational and social work activities under the Erasmus Mundus ADVANCES master's program. We decided that this research potential cannot be shelved and forgotten, because these studies contain very valuable insights on social work itself, its educational value and important social contexts, while also offering a different perspective on the issues and problems of Polish and international social work professions seen from the vantage point of Polish and foreign researchers who interpret local problems as an example of global issues and their challenges. The very fact that most of the researchers came from outside of Poland also brought a different perspective to the reality—it shows how the experiences of the country of origin among people who received different education in social work and have different international experience in social work practice, affects their understanding of social issues of a country they do not know, and whose language and historical traditions they may not fully understand. However, the issue of 'reading' social work from the perspective of multiculturalism, global change and global education, is more important than 'reading' Poland in this book. Apart from participating in the Erasmus Mundus program, all authors were researching various dimensions of social work from a similar critical perspective during their study at the Faculty of Education, at the University of Warsaw, Poland. Bearing in mind the limitations accompanying the conducted research, primarily in terms of time, it was possible to gather and develop research materials, and we hope that reading the texts of a these young researchers from around the world will encourage readers to conduct international research, embolden Polish and foreign authors to look at social problems from specific perspectives that transcend the local, and provide space for

discussions about the role of research in social change and a better understanding of social work and social assistance. The book is addressed to Polish and foreign readers who undertake research or intend to undertake it in a country other than their own. For Polish readers, the presented perspective is also an opportunity to get acquainted with the analysis of activities and research areas studied by our young researchers. Some of these refreshing insights will without a doubt surprise the reader; some may appear offensive or misconstrued in the context of Polish specificity. The subject matter does not always concern our country, but it seems important that the influence of experience and research perspectives discussed during the authors' studies in Poland brought additional value to the way they planned, conducted, and reflected on their research.

Some of the conclusions or recommendations might seem astonishing to Poles. This external view is, however, very much needed by us all. There is no better way to establish dialogue about diversity than to recognize the differences in our understanding of the same things, which we do indeed see differently. I hope that researchers, students, social workers, and academics will find a number of interesting topics in this study. Perhaps they will take them up again from new perspectives, building on or contending with what they have read. This is what I and the authors of this publication hope for: to create vivid, dynamic, creative knowledge that inspires all of us to reflect on the role of practice and research, not only in relation to our own domestic problems but also when encountering international challenges. The joy of discovering the world and sharing this discovery with others is another advantage of this volume.

This collection of articles is divided into three parts.

The first part is dedicated to studies focusing on several problem areas related to the needs of groups at risk of exclusion, which themselves are unable to fight for their rights. In each of the presented studies, there is a specific problem that tends to be overlooked in general descriptions of social problems. Not only do street children have a problem with time management and care but we also do not know how to communicate with them in their language in order to understand their system of values and capabilities. Children whose parents left abroad for work and who seemingly cope with the problem of abandonment pose another major challenge for social work, which usually focuses on economic well-being and leaves comprehensive care behind. Single motherhood among teenage mothers is not only a problem of unfinished education and suspended careers, but also damaged relationships in their families, which often fate them to a lonely struggle to become good parents, despite their young age and lack of support. Another contributor challenges the prevailing debates on aging societies, confronting them with the situation of forced migration of older people in refugee groups. All of these texts confront us with the need to reformulate our current thinking about social work as a field that not only implements social aid tasks within the state-run system but

also—and perhaps above all—actively seeks to provide the best support to the people who might be socially ‘invisible.’

The second part, entitled “Understanding socio-political systems in social work practice,” comprises several studies that close in on the issue of cooperation with systems relevant to the integration of social support. Governmental family support programs (such as the Polish 500+, which is not exclusively addressed to the most needy), local development and social integration programs, and the organization of the health care system are important (albeit not primary) tasks in the field of social work. This area is an important voice for practitioners from social assistance areas to consider why cooperation with various social partners is not sufficient as of yet. At the same time, it is a challenge for social workers who, having recognized the current limits of competences of various structures, would like to exceed and integrate them, operating on the fringes of these systems or moderating the sharp distinctions between them.

The third thematic group develops the theme of crossing the boundaries of social work’s interests, primarily in the area of its working methods. It includes texts examining the activities of social organizations (NGOs), the various forms of political advocacy and social entrepreneurship as important categories showing the tendency in contemporary support measures to verge beyond the traditional frameworks of public systems assistance. There is a visible change in the narrative of the young generation of researchers: it is not the social work involved in social and advocacy organizations or entrepreneurship, but the social work that operates in these areas that has, in my opinion, become an important message of this section of the volume.

In summary, to see the invisible, to strengthen the systems, to penetrate new opportunities for involvement: these are the proposals formulated by the young researchers-practitioners, prompting us to make efforts to improve social theory and practice, despite the existing shortcomings, i.e. in the face of the work that lies ahead and the changes that continuously present it with new challenges.

I firmly believe the texts in this collection are exceptionally interesting and worth a careful read, which I strongly encourage, hoping for inspirational follow-ups to these discourses, a continuity of shared experiences and a vigorous exchange of thoughts on the role of social work in and outside of Poland.

Editor  
Faculty of Education  
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## Wprowadzenie

Niniejsza publikacja jest zbiorem autorskich prac badawczych z zakresu pracy socjalnej prowadzonych w latach 2015–2019. Autorami są w większości osoby, które przebywały w Polsce przez okres około 6 miesięcy i studiowały różne obszary działalności społeczno-wychowawczej oraz pomocowej w ramach programu studiów magisterskich Erasmus Mundus ADVANCES. Uznaliśmy, że nie można takiego potencjału badawczego odłożyć na półkę i zapomnieć o nim, gdyż prace te zawierają bardzo cenne spostrzeżenia na temat zarówno samej pracy socjalnej, działań edukacyjnych i ich społecznych kontekstów, ale także inny ogląd sprawy i problemów polskich zawodów pomocowych widzianych z perspektywy obcokrajowca – badacza, który nasze lokalne problemy odczytuje jako przykład problemów i wyzwań globalnych. Sam fakt, że większość badaczy nie pochodziła z Polski – ukazał jak doświadczenia kraju pochodzenia osób które otrzymały edukację w zakresie pracy socjalnej i mają międzynarodowe doświadczenie praktyczne, wpływają na ich rozumienie kwestii socjalnych kraju, którego nie znają, którego języka i tradycji historycznych być może nie w pełni rozumieją. Bardziej jednak niż „odczytywanie” Polski jest w tej książce ważna problematyka „czytania” różnorodnych obszarów pracy socjalnej z perspektywy wielokulturowej, globalnych zmian i globalnej edukacji socjalnej. Wszystkich autorów bowiem łączy – poza uczestnictwem w programie Erasmus Mundus, badanie różnych wymiarów pracy socjalnej w podobnej, krytycznej perspektywie, podczas studiowania na Wydziale Pedagogicznym w Uniwersytecie Warszawskim. Mając na uwadze ograniczenia towarzyszące prowadzonym badaniom, przede wszystkim w zakresie czasu możliwego do zgromadzenia i opracowania materiałów do badań, mamy nadzieję, że lektura tekstów kilkunastu młodych badaczy z całego świata zachęci czytelników do prowadzenia badań międzynarodowych, skłoni zarówno polskich jaki i międzynarodowych autorów do przyglądania się problemom

społecznym z określonej, nieco dalszej niż lokalna, perspektywy, i wyznaczy przestrzeń do dyskusji o roli badań w zmianie społecznej i o lepszym rozumieniu działań pomocowych. Książka jest skierowana do czytelników polskich i zagranicznych, którzy podejmują badania lub zamierzają je podjąć w kraju innym niż ich własny. Dla czytelnika polskiego jest to także możliwość zapoznania się z analizą działań pomocowych i obszarów badawczych, które wydały się interesujące naszym młodym badaczom. W niektórych przypadkach zaskoczy być może świeżość spojrzenia, w innych może będzie razić niezrozumienie kontekstu polskiej specyfiki, czy zdumiewające dla Polaka konkluzje lub rekomendacje. Tematyka nie zawsze dotyczy naszego kraju, lecz jest niezwykle ważna z uwagi na wpływ doświadczenia i perspektyw badawczych dyskutowanych podczas studiów w Polsce. To spojrzenie z zewnątrz jest jednak nam wszystkim bardzo potrzebne. Nie ma bowiem lepszej drogi do dialogu o różnorodności niż rozpoznanie różnic w rozumieniu tych samych rzeczy, które widzimy – inaczej. Mam nadzieję, że badacze, studenci, pracownicy socjalni, akademicy znajdą w tym opracowaniu szereg interesujących tematów. Może podejmą je na nowo, inaczej, w uzupełnieniu lub w krytycznej dyskusji do tego co przeczytają. Taką mam ja i autorzy niniejszej publikacji nadzieję – na tworzenie wiedzy żywej, dynamicznej, twórczej, inspirującej nas wszystkich do refleksji międzynarodowej nad rolą praktyki i badań nie tylko wobec własnych krajowych problemów, ale i wobec międzynarodowych wyzwań jakie stoją przed nami wszystkimi. Radość odkrywania świata i dzielenia się z innymi jest dodatkowym atutem tych prac.

Niniejszy zbiór został podzielony na trzy części.

Część pierwsza poświęcona jest opracowaniom, które na pierwszym planie ukazują kilka obszarów problemowych, związanych z potrzebami grup zagrożonych wykluczeniem, a które same w niewielkim stopniu mogą/potrafia walczyć o swoje prawa. W każdej z prezentowanych prac jest to określony problem, który ginie w uogólnionych opisach problemów społecznych. Dzieci ulicy to nie tylko problem zagospodarowania czasu i opieki ale także komunikowania się z nimi ich językiem, w celu zrozumienia ich świata wartości, potencjałów i możliwości. Dzieci, których rodzice wyjeżdżają za granicę w celach zarobkowych pozornie radzące sobie z problemem opuszczenia to duże wyzwanie dla pracy socjalnej skupionej na aspektach ekonomicznego dobrostanu, podczas gdy potrzebna jest opieka całościowa w sytuacji opieki zastępczej lub opieki monoparentalnej. Samotne macierzyństwo nieletnich matek, to nie tylko problem przerwanej nauki i zawieszony kariery, ale zniszczonych relacji w rodzinie, przez które skazane są bardzo często na samotną walkę o to by być dobrymi rodzicami, mimo młodego wieku i braku wsparcia otoczenia. Powszechne debaty o starzejących się społeczeństwach zderzone z sytuacją przymusowej emigracji osób starszych w grupach uchodźczych – stawiają nas przed koniecznością przeformułowania naszego dotychczasowego myślenia o pracy socjalnej jako dziedziny nie tylko realizującej określone zadania pomocowe w systemie

państwa, ale a może przede wszystkim aktywnie poszukującej i ukazującej problemy „niewidzialne” społecznie.

Część druga zatytułowana „Rozumienie systemów społeczno-politycznych w praktyce pracy socjalnej” sytuuje kolejne prace wokół zagadnienia działania we współpracy z systemami mającymi znaczenie dla integracji działań pomocowych. Zarówno programy rządowe wsparcia rodzin (takie jak 500+ nie skierowane tylko do osób najbardziej potrzebujących), jak i działania na rzecz aktywizacji lokalnej i integracji społecznej, czy wreszcie udział i wsparcie w organizacji systemu ochrony zdrowia, stanowią ważne choć nadal wydaje się, że jednak nie priorytetowe zadania w obszarze pracy socjalnej. Ten obszar stanowi ważny głos praktyków z obszarów pomocowych do zastanowienia się, z jakich powodów współpraca z różnymi partnerami społecznymi nie jest jeszcze wystarczająca. Jednocześnie stanowi wyzwanie dla pracowników socjalnych, którzy widząc obecne granice kompetencji różnych struktur, chcieliby je przekraczać, integrować i działać na pograniczach owych systemów lub w celu łagodzenia ich ostrych rozgraniczeń.

Trzecia grupa tematyczna rozwija wątek przekraczania granic zainteresowań pracy socjalnej, przede wszystkim w obszarze metod jej pracy. Znajdują się w niej teksty badające działalność organizacji społecznych, formy rzecznictwa politycznego czy przedsiębiorczości społecznej jako ważnych kategorii ukazujących tendencje do współczesnego „wychylania się” działań wspierających, poza tradycyjne ramy publicznego wsparcia o charakterze pomocowym. Widoczna jest tu zmiana w narracji pokolenia młodych – to nie praca socjalna zainteresowana organizacjami socjalnymi, rzecznictwami czy przedsiębiorczością, lecz działająca w tych obszarach, stała się w moim przekonaniu ważnym przesłaniem tej części opracowań.

Widzieć niewidzialne, wzmacniać systemowo, penetrować nowe możliwości zaangażowania – to propozycje załączonych tekstów młodych badaczy-praktyków, inspirujące nas do podejmowania wysiłku w celu ulepszania teorii i praktyki społecznej, mimo niedostatków - a zatem wobec pracy, która jeszcze nas czeka i zmian, które stają się dla niej nieustającym wyzwaniem.

W moim przekonaniu teksty, z którymi zapoznają się Państwo w niniejszym zbiorze, są niezwykle interesujące i warte uważnej lektury. Bardzo gorąco zachęcam do tego, licząc na inspirujące kontynuacje naukowych dyskursów i budowania wspólnych doświadczeń, wymianę myśli o roli pracy socjalnej, nie tylko w Polsce.

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## Sharing Experience and Learning in Doing International Research: The Case of the Erasmus Mundus ADVANCES Program<sup>1</sup>

### Abstract

The article explores the experience of implementing the international studying program ADVANCES (Advanced Development in Social Work) in terms of the challenges and dilemmas in designing and realizing joint education & research programs. The program exposes the difference between ‘the talk’ and ‘the walk’ in the global social work concept building of human and institutional capacities, on the one hand, and merging theory and practice in preparation to contemporary social work profession, on the other. It also brings to light the process of integrating models and understandings of how international collaboration in higher education could look like (and be delivered worldwide). The ADVANCES program, which integrates the theories and practices that were formerly approached separately in social work, creates a context for the European (and, by extension, international) status of social work, while its respective components, such as the experience of social work institutions and their beneficiaries, contribute a new, global value to the discussion by demonstrating the ‘diverse universe’ of helping professions offers.

**Keywords:** global social work, joint master’s degree program, international studies, aims of social work

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<sup>1</sup> The ADVANCES Program is part of the international Erasmus Mundus scheme. Program description has been prepared by academics from five European universities, including the University of Lincoln, United Kingdom (School of Health and Social Care), Aalborg University, Denmark (Faculty of Social Sciences), Technical University of Lisbon, Portugal (Institute of Social and Political Sciences), Université Paris Ovest Nanterre La Défense (Faculty of Educational Sciences), and the University of Warsaw (Faculty of Education). The first edition of the program was coordinated by Dr. Michael Rassel of the University of Lincoln, and took place in 2013–2019; the second edition, coordinated by Professor Lars Uggerhoj of Aalborg University, began in 2019 and will conclude in 2023.

## Introduction

The growing interest in and number of international social work education programs proves the desire of researchers, educators, and practitioners for collaboration, exchange of knowledge, skills, and experiences, while also indicating a search for universal guidelines, standardization, and commonality. The continuous globalization of social work perspective has to face both the resistance of practitioners focused mainly on individual and local problems, and researchers who are critical of the areas of its development, intended to bridge culturally, economically, politically, and historically diverse societies (Dominelli, 2014; Hely, 2008 Hugman; Moosa-Mitha Moyo, 2010).

Education for social work faces similar challenges. The ostensible emergence of the internationality of social work manifests itself primarily in the comparative aspect of social work systems of various countries, and in accepting the legitimacy of global standards of social work. Therefore, designing an international, globally relevant social work education program was the main task of ADVANCES (Russell et al., 2019).

Some reasons why the University of Warsaw joined the program were tied to the argument that a strong belief in ‘local solutions to local problems’ is more present in countries such as Poland, where intercultural skills are a notion entrenched in the global theoretical discussion rather than in the lived experience of local and individual practices. The multicultural experience of social workers is still at an early stage, and immigration is not substantial enough to create concern or debate for social work interventions at a bigger scale (Naumiuk et al., 2020).<sup>2</sup> Many active NGOs tackle the emerging issues of new immigrants, legal requirements of citizenship, and policies that prevent mass migration to pro-migrant movements in our country, though the formal systems have failed to recognize this problem as of yet. Seen and believed to be united through the religion, patriotic traditions, and a long history of protecting its identity, Poland remains focused on national unity, which prevents it from being perceived as multicultural phenomenon—a country hosting and welcoming diversity. This way of seeing the ‘foreign’ or ‘domestic’ aspects of social life gives rise to misunderstandings in thinking about its international or global impact. The mass-media debates capture the conflict between prioritizing in-country problems and the urgent need for internal reforms, on the one hand, and the international issues that are not the ‘target’ for the Polish government or state, on the other. The global interrelations and interdependencies are not nearly

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<sup>2</sup> The Polish experience in implementing ADVANCES is presented in the article “When Europe’s East, West, North and South Meet: Learning from Cross-Country Collaboration in Creating an International Social Work Master Programme,” submitted as a contribution to: Lorenz, W., Havrdová, Z., Matousek, O. (Eds.). (2020). *European Social Work Education and practice: East-West Exchanges Between Universal Principles and Cultural Sensitivity*. Cham: Springer.



as visible and understood in social services, where the systems and processes are verified in practice. In many cases, the global concepts are derived from the grass-roots. Still, foreign language skills are not obligatory among social workers, thus compounding the feeling of being excluded from the bigger picture. These factors influence social work in Poland, which still seems very much 'Polish,' so the question would be why to discuss and, by extension, why to engage in international social work education?

Part of the answer is that social work is not only a responsive practice but a preventive and creative environment for changes to happen. Globalization is one of the factors that shape the present scene of changing living conditions. The possibility of and the right to mobility of work, travel, and education in Europe (and beyond) influences the methods of work in various sections of service-use and service-provision processes, and becomes a fact, rather than mere wishful thinking. Social work education captures this change in both theoretical and practical aspects, since 'multicultural skills' changed from an idea of the future to an integral part of the current reality. The number of migrant children in Polish schools rises systematically, as does the number of people of foreign origin working in Poland. Among them are potential and actual service-users. In the past 20 years about 2 million Poles have migrated to the UK, Germany, and outside of Europe. Many of them are professionally and voluntarily engaged in social work systems worldwide. They use and experience various social support systems. Polish social work has been learning about them, and needs to react to the growing and expanding reality of 'being of service in spite of nationality.' The phenomenon of this global interchange may be seen in the negative light of emerging problems caused by globalization and mobility, but it may also be seen as a possibility for the new era of social work development, using the global potential of the social capital behind the exchange of ideas and practices.

As an international Master's in social work program, ADVANCES has shown a lot of promise in enabling the exchange of knowledge, skills, and experiences, yet it has also demonstrated the difficulty and the depth of discussions required to adapt the program to the diversity of expectations among all participants of the process. In our article written in 2019 (Rasell et al., 2019), we showed some of these aspects, including local-global constraints in perceiving the value of the program and social work priorities, various cultures of higher education and expectations, difficulties in managing the differences from the learning angle (students) and teaching angle (academics), the curriculum and content discussions as a struggle for a synthetic representation of international social work education, the critical and value-based dialogue between the students and lecturers, the Global South-Global North postcolonial inclinations' awareness, and many more. Realizing how difficult and challenging it is to fulfill such a task, it became a learning journey and a learning curve for all academics and students participating in the program, in particular

with respect to the new experience of East-West collaboration and its potential in social work education and research in Europe. Below I describe some of the challenges worth reflecting on in the process of learning we all take part in as teachers and students of social work education program. The research taken as part of the course is not only a 'result' but also a big question that we all ask ourselves while taking on international topics, including international contexts, or presenting the outcome of our work to international audiences.

### **Creating and developing a joint education plan as a response to global social work needs**

The globalization process seen as the either unification or interconnectedness is not an issue of 'outside world' anymore. It is experienced and understood very clearly through economics, technology, and mass travel. It has become a new interrelated context in which people live nowadays. With the right to free movement in Europe and the open door policies adopted across a number of countries, minutiae are becoming an international issue that social work starts to deal with. When you live and work in one country but move to another as a pensioner, it immediately creates the question of adapting the local social work system to deliver proper services to foreign senior residents living there. If you move to another country and become poor, are you under the care of the hosting country or still under the care of your country 'of origin'? If you are eligible for family benefits under one country's conditions, why are you refused similar treatment if you move to another country of the same status? And who should pay for, decide on, and solve these problems? These circumstantial differences, complicated by the world's environmental disasters, i.e. the political, racial, religious or neighborly conflicts that influence 'our' citizens' require that social work transcend the local confines. At the same time, the global impact of these processes has given rise to challenging consequences on smaller scales, so we shall have to learn how to cope with this complex paradigm.

Education has not been paying enough attention to the demands embedded in these changes, too. Social work has been treated as a growing profession that is only remotely connected to educational challenges. Educational systems seemed to be perceived through and narrowed down to school or vocational preparation-related issues. A more integrated approach to these two disciplines, experienced as tools for empowerment through the social engagement of education (Olubiński, 2004, pp. 115–133; Marynowicz-Heta, Piekarski, Zajac, 1996, pp. 131–174), social work educational practices, and the so-called education in action (Mendel, Skrzypczak, 2013), has not received adequate support, nor has it attracted wide-ranging discussions on the applicability of social education in the global environment. The globalization trends have developed a context in which this interrelation between pedagogy and social work translate into another, international level. The new competences,

knowledge, and skills, but also the ability to work together on issues and problems that require our attention and reaction as social work professionals, call for a new approach at the theoretical, practical, and humanitarian levels.

From the onset, the 2013–2019 Erasmus Mundus MA Advanced Development in Social Work (ADVANCES) program adopted an international perspective on both theoretical and practical aspects. It grew from the conviction that although the social work profession focuses on promoting social change and empowerment in local settings and specific contexts, it is an increasingly global and international field, responding to complex and diverse issues as a global community of practitioners with its own value base, guidelines, and associations (Noble, Strauss, Littlechild, 2014). The program is aimed to contribute to this global dynamic in social work with an international postgraduate degree that promotes active, knowledgeable professionals who can confidently tackle global issues at a local level and be part of discussions on how international educational experience contributes to global and local social work perspectives. In this respect, the program aims to promote European higher education and contribute to sustainable development around the world, in line with the Erasmus Mundus scheme.

The program addresses the labor market and social justice needs for a more developed social work education system that explicitly focuses on transnational competencies, capacity-building, and innovation in social work. National-level courses in developed countries tend to treat international social work as a reference rather than a core component, while postgraduate social work courses in developing countries are rare or designed as copies of their Western counterparts. The few international social work courses that exist around the world rarely include a high degree of student mobility, and tend not to emphasize high-level professional competences for practitioners, preferring to focus on academic knowledge and (research-related) skills. There is therefore a gap to be filled by offering training to qualified social sector professionals who wish to extend their practical skills through an explicitly international curriculum and study program.

The educational concept of the ADVANCES program was designed to provide social work professional with outstanding levels of practice skills so that they can confidently respond to the vulnerabilities and uncertainties facing societies across the world. A strong emphasis is placed on the knowledge and skills required to work with international, diverse environments across borders and cultures. The main objective of the program is to enhance the skills, capabilities, and knowledge of individual social work practitioners and the overall social work profession at a range of levels.

[A] review of the documentation on international social work during the development of the program resulted in the following overall aims:

- Professionalize social sectors around the world through the development of advanced practice skills in social work

- Produce practitioners who can confidently respond to rapid social change
- Promote social justice and professional social work ethics that encourages equality and empowerment
- Promote the awareness of the transnational nature of social work issues and strategies/solutions for responding to them
- Encourage skills in social work entrepreneurship and innovation in response to the changing models of social service delivery

These goals were embedded in the overall objectives for individual students on the program, who upon its completion should be able to:

- Critically examine the purpose and context of social work, showing substantial knowledge and understanding of the international, national, and local contexts of practice, including current issues and future forecasting.
- Critically and systematically integrate different aspects of knowledge, skills, and values in social work; analyse, assess, and manage complex cross national issues and contexts when responding to human problems.
- Independently and creatively develop innovative interventions in social work service delivery, including entrepreneurial responses to promote social cohesion and integration.
- Promote values and ethics of social work and synthesize intercultural knowledge, particularly in providing support and promoting change for those experiencing multiple disadvantages and in cross-cultural environments, with an emphasis on social justice.
- Have proficiency to participate in international and national projects and developmental work within the area of social work
- Critically, independently, and creatively contextualize the knowledge, skills, and values of social work, with critical reflection in practice and on practice; identify further knowledge and skills development, and be responsible for their own proficiency (excerpt from the outline of the ADVANCES program)

There were many dilemmas embedded in responding to these global challenges through creating joint master's degree program while simultaneously treating them as national challenges. They were seen in the choice of elements addressing global issues in education of social workers, which were adequate or relevant to the needs of modern professionals representing social work in various localities. There were many questions and discussions in this field: Shall we focus on the integration or promote the unique value of each nation's culture in our approaches? What concepts and definitions of innovation, social justice or professionalization shall we use? How to measure and prioritize the importance of needs in Africa or Asia? How to assess them in our research and screen them through the 'international relevance' lens? Critical judgments had to be reviewed and criticized for their own colonial, neo-colonial, and postcolonial stereotyping concepts of the West and the East, the North and the South. Among the discussions on 'what we mean by...,' which were very inspirational in redefining the foundations of social work, we found ourselves caught in a set of dilemmas of how to make a joint effort where all partners would play active roles in designing, evaluating, and leading the program. This created

the questions of joint responsibility, mutual trust and competences, and the ability to deliver as projected in the plan. The challenge was organizational: how to make the program efficient and to whom to delegate its respective duties; how to manage it time-wise (we are all scholars with other duties); financial (how to create a self-sustaining program); and, last but not least, conceptual (what should be included in certain modules and why). With many barriers, the program became part of our university life. We were also able to learn more about international program creation, including the nitty-gritty of international module design, collective marking, integrated assessment of students and our own 'international' performance in new collaborative ways that spanned beyond our previous national didactic experience.

The project partners came together on the basis of the existing teaching, projects, and previous research co-operation. The ADVANCES program took over two years to develop, based on an analysis of the needs of the global social work profession and discussions of how to incorporate each institution's expertise into a coherent MA degree program. As the overall coordinating institution of ADVANCES, the University of Lincoln provided organizational input and acted as a liaison with the European Commission on behalf of the ADVANCES consortium. The creation of the ADVANCES program was finalized in a Consortium Agreement signed by the legal representatives of all five EU universities in February 2013.

The program was designed and developed closely by all partners participating in the program's overall concept. They designed and discussed its learning outcomes, modules, procedures, and teaching approaches. Program management also became a collaborative exercise through the establishment of the ADVANCES Program Committee, containing two academic representatives from each institution, overseen by the Board comprised of the legal representatives of the respective universities. It enabled the scholars to approach social work teaching as a more integrated concept, designed collectively through international partnership.

The universities delivered teaching based on their staff's expertise in teaching/researching advanced skills, and their command of English as the working language. Each institution's input was based on their strengths and resources. All participant universities could also invite leading social work academics from outside the EU as lecturers. Students gained additional experience from local social sector partnerships and networks by meeting social workers in each country, taking field trips to local services/charities, and learning more about the contexts and realities of social work practice in different countries.

Program content was comprised of 14 modules: Core academic skills; Critical Knowledge and Perspectives on Society; Advanced Methods and Interventions; Communication and Creativity in Social Work; Working within Social and Public Spaces; Power Relations and Actor Perspectives; Problem-based Learning: Power Relations and Actor Perspectives in Social Work; Practice-oriented Research in

Social Work; Globalization, Migrations and Cultural Diversity; Globalized Social Work and Sustainable Development; Professional Ethics and Human Rights; Social Administration and Social Entrepreneurship; Social Work Research Methods and Research Projects; in the course of the program, students wrote their MA theses, defending them at the end of the second year.

The main dilemmas in the area of content design and its realization included the interrelations between modules, the possible repetitions and gaps between the subjects and staff presentations, the smooth adaptation to teaching styles and assessments, as well as the new experiences of different cultures in their approaches to social work practice. Given the uncertainty of potential partners in the field and students' competences, the main challenge involved the potential language barrier. Some scholars also found it difficult to understand the formal bureaucracies of participant countries/universities' requirements in order to make this program work and have the awarded MA diplomas recognized internationally. This key element of holding a diploma that would open doors to better work rather than just be a hollow document was discussed with the respective Ministries and taken into consideration while planning the end of the study program. So far, there is no one joint international MA diploma for ADVANCES due to the difficulties on national education policy levels, however ADVANCES 2.0 (the program's continuation) has not given up on this goal. As of now, students receive multiple diplomas. In addition, students are awarded a joint certificate of studies, signed by all participating universities. The concept of joint diplomas is developing and could bring a huge difference to the current offerings, given the visible need for such international education quality recognition of in social work environments worldwide.

### **Learning internationally as a process of transforming the aims and goals of young researchers**

Approximately 2/3 of the students participating in the program come from outside of the European Union, mainly from the developing countries, and 1/3 of the students hail from across the Community. The high level of diversity in students' backgrounds, as well as their international mobility during the program, are seen as pedagogically beneficial, as they enable students to learn to work and study across difference and provide them with unique social and cultural opportunities.

Part and parcel of the 21<sup>st</sup> century reality, the internationalization of studies affects the young generation of social workers, who each have their own multi-cultural experience. One ADVANCES student worked as social worker in Poland before moving to Australia; another was born in Poland, emigrated to the UK with her parents, and received her BA in Social Work there. The international roots of

other students and staff engaged in the program are often mixed and prevent one from classifying them under clear-cut national labels.

The ADVANCES program gives even more international exposure, practice, and experience to all participating individuals, who in many cases had been previously exposed to international programs and want to pursue international careers. It requires that students travel to a different country each semester, settle, study, and pass their exams there, and then pack again and move someplace else. This experience of constantly changing cultures, languages, learning styles, teaching requirements, and formal bureaucracies in 5 countries within 2 years makes one a true mobile social worker in practical terms, as well as an experienced 'other,' even within the social workers' professional group. Despite a temporary stoppage in physical mobility in 2020 due to COVID-19 restrictions on international travels, the mobility of ideas continues through online teaching. Integration and multicultural orientation is also implemented on inter-relational levels among students and teachers, institutions and laws. This produces a strong group of motivated students who experience global social work even more than their teachers. Part of the effect is achieved through the ADVANCES Alumni, whose task is to continue networking and supporting the human capital of the program. To bolster this effect, the program has been designed as an educational and skills package to shape more confident and trained specialists in order to progress towards advanced practice or a range of social work leadership roles, including supervision, management, strategy and policy, applied research or project development. To this end, the program has certainly been a success, but we shall not forget about the personal challenges that these people faced each day while studying, which are rather difficult to transpose into long-term stable job settings while retaining the same optics of internationalized social work. On the other hand, these students may now understand more than other social workers hiring them, i.e. the common ground of social work in spite of the local differences. This is why their research is so relevant and innovative at the same time. It pictures the transition from the past to the future, which includes a mixture of feelings spanning from conformism to ambitious responses to calls for change.

When starting the course, students mentioned some of the goals they wanted to achieve. These included, in no particular order:

Creating an integrated web of international social workers within this program and further; improving linguistically; being able to work as social worker in many countries; having new points of view on the different topics already worked on; learning as much as possible from the program and other students experiences on social work; developing leadership skills so that I may become a socially engaged social worker; being animated and motivated/prepared to start new projects back home; internationalism, i.e. being in a position to work at the global level and have a deeper understanding of social work in different contexts; becoming a competent social worker.

With respect to perceived challenges, students mentioned the following:

To confront myself with my home country practice; to write and study in another language and culture; to feel quite relaxed among so many countries and travelling; to relate to the background and context of the place I am from; to be busy seeing/experiencing new countries to study; to have enough time for field practice; lack of money and experience of moving around; language barriers—being unable to understand the language of diverse groups of people; disagreement with some cultural practices of various cultures may inhibit the applicability of my designed framework for practice, and my personal biases may lessen the effectiveness [of the program]; life challenges: missing family, boyfriend, friends and home; academic writing in English (exams/assignments); different backgrounds and social realities to bring together; being alone, marginalized and not accepted by the others and failing; how to cope with moving ‘house’ every six months.

These statements are very much akin to immigrants’ concerns when they move to work or study abroad and feel a mix of fear and excitement at the same time.

Also put on the table were some benefits:

To develop leadership skills to work with different people from various backgrounds; to study policy issues that will allow me to put into use what I have learnt; to be able to define real needs and resources to work with; to contribute to social work knowledge and practice; to be part of a better society and a better world; to develop listening skills as I feel it is an important skill to understand the needs of vulnerable groups; to be more aware of who I am; to gain of the ability to design social work models in addressing social problems.

Students were challenged by intensive travels, the need for quick adaptation to different cultures while studying, different sets of academic requirements, and even different grading criteria. The main issue was with transferring from one country to another while remaining an active student. Technical, legal, and administrative challenges also determined the postponement of a soft ‘landing,’ adjustment, and progress of students’ professional development. With the research included in their study plans, they were slowly realizing the reality of being an outsider in the local contexts, yet remained very much interested in the unfamiliar whereabouts of their research.

Since more international students have been coming to Europe and Poland, the studying barriers have become less painful; still, ADVANCES is not a residential program, not all of its teachers speak English fluently enough to assess masters’ theses written in English, nor can all of them teach full courses and prepare modules in English, moderate discussions at a proficient theoretical level, or be of help when it comes to practical orienteering; some university libraries do not offer extensive collections of social work literature; some administrative staff sees ADVANCES students as ‘aliens’ in the system. The program has emerged as the first experience of its kind for both academics and administrators at our department that truly requires the personnel to work collaboratively, internationally, and



in integrated manner with a group of people with such diverse backgrounds and experiences that the courses offered must truly be engaging and multifunctional to make things work. Additionally, this kind of joint education scheme has never before been tested in such a form, so the success rate largely depends on the attitudes of the project's team members. The integration of staff and students, along with their willingness to understand one another's teaching and learning styles, knowledge, and skills that are mutually transferred, coalesce into environment conducive to sustainable development. Frequent team and student discussions and external assessments of different kind enable the platform to be adequately amended and changed on a continuous basis.

Similarly, the local institutions that participate in the program as the venues of site visits, internships, and trainings or place-based research sites, learn a lot from the program and its students. This type of learning has not been designed on purpose—these informal 'global agents' working in the social field around the world who want to study particular topic in particular places exemplify the broader concept of adding new value to the practice of dealing with national problems, now redefined in the international context. Their learning experience indicates there is no better space for social work integration than a common program that empowers real students to ask questions and help re-establish social work within an internationally understood framework. For example, the Polish installment of ADVANCES saw a discussion with social workers whose understanding of their impact on health services was minimal; they were exposed to this situation when one of the students began researching the connections between social work and health care systems in the context of health care needs of social work clients. The outsider's point of view<sup>3</sup> sparked an interesting exchange of ideas on how social work professionals are actively engaged as health care auxiliaries, how the social work and health issues are interrelated, and what types of collaboration between social workers and health care services should be established. The difficulties experienced in the education process also sensitized students to the fact that doing research in a foreign country requires a deep understanding of its cultural, linguistic, and educational contexts, as well as a good degree of patience and proper communication to ensure an adequate understanding of a given field of study.

We see that a key element of research training and education is not only to teach methodology but to consult and guide the methodological culture, and be flexible with the changing perspectives of young foreign researchers, who at the beginning ask the teachers what to study and how to do a research, but then transform themselves into experts whose international experience and international academic knowledge at times exceeds (or simply differs from) that of their supervisors and

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<sup>3</sup> Rutkowak, J. (Ed.). *Uczenie się od outsidera. Perspektywa europejskiej współpracy edukacyjnej*, Kraków: Oficyna Wydawnicza Impuls, 1997.

research experts on site in a given country. They realize that having this advantage enables them to show other team members (students and teachers) new ways of doing research in a given field. This change transforms the student-supervisor relationship into a model based on discussion and collaboration, which leaves students much more freedom and space for independent decisions based on this atypical situation that is so different from that in which regular domestic or foreign students enroll in a program to do research as part of their MA seminar. Such a change brings various challenges, but it also adds a new value to the research process guided by this new type of relationship between researchers contributing to a non-standardized educational program founded on their joint perspective.

### **Global challenges in international social work professional development and research**

Global education creates new challenges as well as new opportunities for different educational professions, including higher education in social work theories and practices. It not only poses the need for the recognition of international actions but also heralds the realization of the global social work agenda and standardized practice. It challenges itself to reshape educational strategies in teaching social work to re-establish social work as a more universal and globally oriented profession (Healy, 2014, p. 369). When there is no international collaboration, global concepts may be seen as a mere comparative exercise or theoretical concept distant from real local issues. The perspective changes with respect to the present-day mass migration reality of clients and professional workforce, therefore creating joint international projects is paramount to international social work practice and its subsequent ability to respond to the need for adaptation for these global changes. This modification should be accompanied by a shift in the understanding of the role of international research, both in terms of its comparative nature, and its potential as a platform for an exchange of ideas and a showcase of local differences.

International research increasingly takes on the character of a mutual discussion about the problems of individuals and groups that are common to both global and local (often multi-local) contexts, such as domestic violence in immigrant families from country X living in country Y. This shift from the local lens to the glocal (global and local at the same time) perspective on where you live is a driving force of the universalization, standardization, and recognition of social work as a global phenomenon. It revitalizes the old discussions on the internationalization of social work, but also creates the confusions and exposes the concerns and fears of losing the local knowledge, perspective, and impact, thus causing concern over the possibility of giving them up in favor of some imperialistic notions (Healy, 2014, p. 369). It also serves as an important statement of the need to learn and live with continuous dilemmas of the globalizing world, in which we choose

to challenge ourselves, our professions, and the people around us to think about what the term ‘helping profession’ means to us these days. The research conducted by ADVANCES students shows this to be a trend among the new generation of practitioners-researchers who are open and sensitive to contexts, cultures, and perspectives in their flexible understanding of conditions for the implementation of the tasks of contemporary social work.

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## Streszczenie

### **Współdzielenie wiedzy i doświadczeń w procesie uczenia się i prowadzenia badań międzynarodowych. Przykład programu Erasmus Mundus ADVANCES**

Artykuł analizuje doświadczenia związane z wdrażaniem międzynarodowego programu studiów Erasmus Mundus ADVANCES (Advanced Development in Social Work) w obszarze wyzwań i dylematów w projektowaniu i realizacji wspólnego programu dydaktyczno-badawczego. Treści dydaktyczne i inicjatywy badawcze stanowiące efekt kilkuletniej współpracy uwidaczniają różnice między dyskusjami a realizacją globalnej koncepcji pracy socjalnej z uwzględnieniem możliwości jednostek i instytucji oraz łączenia teorii i praktyki, w przygotowywaniu współczesnych praktyków i badaczy działań pomocowych. Ukazuje również proces integracji różnych modeli i rozwijania koncepcji realizacji międzynarodowej współpracy w szkolnictwie wyższym. Program studiów oraz powstające w jego wyniku prace badawcze obejmujące różne teorie i praktyki, które wcześniej były odrębnie analizowane w pracy socjalnej, tworzy kontekst statusu międzynarodowego działań socjalnych, a jego elementy, takie jak doświadczenia beneficjentów i instytucji pracy społecznej omawiane i współdzielone na forum badawczym, wnoszą do dyskusji nową globalną wartość ukazywania „zróżnicowanego wszechświata” ofert pomocowych.

**Słowa kluczowe:** globalna praca socjalna, wspólny program studiów magisterskich, studia międzynarodowe, cele pracy socjalnej

# Part One

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## Listening to the Voices of 'Invisible' Groups



## Social Work and Labor Migration: The Impact of Maternal Migration on Families and Children Left Behind

### Abstract

Labor migration is considered circular and recurrent in various parts of the world and involves the interchange between its costs and benefits. The trade-offs between cost and benefits are often most critical to female migrants based on their position in the family as primary caregivers of children, and their vulnerability in society. This paper explores the understanding of the impact of mother's migration on families and children left behind and the social work strategies available. The research shows that although remittances are very beneficial to families, their negative implications on child and family welfare cannot be disregarded. While some countries have established support for women, their families, and their children, there is still a need for a deepened understanding of the socio-cultural and political factors that affect social action. Therefore, it is essential to conduct further research to identify gaps in policies and services and develop more appropriate micro, mezzo, and macro interventions that utilise bilateral or multilateral cooperation among various local and international social work actors.

For this study, the notion of children left behind refers to children whose parent(s) have migrated (external or internal migration) for work, and who are left behind in their home country or community. They may be left behind in the care of the remaining parent, relatives, friends, or by themselves.

**Keywords:** children left behind, families left behind, maternal migration, crisis of care provision, social welfare

### Introduction

Migration for work has become a common phenomenon. It is considered a continuous global trend, as citizens of developing countries try to keep up with the labor demand of other, more developed countries. International labor migration plays a vital role in the globalized economies of the 21<sup>st</sup> century, creating a complex web of connections and transactions between the Global South and the Global North (Graham et al., 2012, p. 793).

Per IOM GMDAC (2016), 1 in 7 people or more than 1 billion people are considered global migrants. In 2015, the South-North movement (from developing to developed countries) comprised 85.3 million, while the South-South migration flows (across developing countries) comprised 90.2 million migrants (UNDESA, 2016a p. 1). International migrants contribute to the economic growth of both countries of origin and destination. This includes contributing to their host countries in terms of taxes and social contributions while sending remittances to their home countries, making them a source of foreign exchange and a reliable source of disposable income for their left-behind families (UNDESA, 2016b).

Recent studies have shown that although economic migration has significant benefits for migrant families, it also has negative implications, specifically concerning the repercussions of mothers' migration for children and families left behind. A study conducted by Save the Children (2006) shows that around 1 million Sri Lankan children are left behind by labor migrant mothers, while an estimate of 9 million Filipino children under the age of 18 are left behind by one or both parents working abroad (Castaneda and Buck, 2012). In Europe, approximately 500,000 children are 'left behind' or have at least one parent abroad. In countries along the Baltic Sea coast, including Poland, between 1.1 and 1.6 million children aged 9-18 experienced some form of separation from at least one parent within three years. (Ruin, 2014; Yanovich, 2015). A child with the said background has become known in the media as "Euro-orphan" (*Euro-sierota* in Polish)—a child left behind while its parents go abroad to work. Although the phenomenon predates Poland's accession to the European Union in 2004, it has continued to grow since the 2004 EU enlargement. (Connoly, 2015; Urbanska, 2009).

The significance of the study lies in its aim to contribute to a better understanding of the experiences of female migrants and their left-behind families, and the existing social work interventions addressing the social impacts of migration. With the desire to capture the experiences and perceptions of migrant mothers and social work professionals, the study also explores the social work roles and responsibilities, the attendant structural limitations, and their implications for the effective delivery of social services. Furthermore, examining the impact of migration on the left behind will promote further analysis on the connection between the economic, social, and psychological aspects of maternal migration, and its implications on countries' development agendas and social work action.

## Background and context

Social workers and social welfare practitioners involve themselves with issues of the most vulnerable and marginalized sector. While not all "migrants" belong in this category, their contribution to society through investment and employment is to be noted. Migrants do not imply a rise in crime and unemployment rates, fewer

jobs, overcrowding, overuse of social services, but rather contribute to the receiving society or country, including additional social welfare workforce (Boccagni, 2014; Williams, 2010; Castles and Miller, 2009, p. 15; Williams and Graham, 2014, p. i2).

With the emergence of “migration societies” (Cox and Geisen, 2014, p. i158), social work faces the challenge of responding to various issues that arise from the internal and international movement of people. Migration is also entwined with multiple issues related to social work in the global and local contexts: rights, laws, policies, democracy, health, education, social relations, and their interconnections at different levels of society (Cox and Geisen, 2014, p. i158). The impact of international migration on the daily experiences of individuals and families highlights the interconnection of the local and global contexts: the importance of remittances for support of families left at home, and the erosion of social support from communities due to migration. The migrant population and their families are often over-represented among those in need of social welfare support. In addition, they are also often subject to abuse, discrimination, marginalization, and other disadvantages, despite contributing to societies’ workforce. Furthermore, migration affects the notions of nationhood, belonging, and identity, which poses concerns in the context of social work (Williams and Graham, 2014, pp. i2-i3).

Transnational families form when the parent(s) migrate(s) for work to another country, leaving their children and other family members in the country of origin. As migration is often economically motivated, remittances produce positive outcomes for the migrant family’s welfare: better education and health of children, higher investment rates and savings (IOM, 2013). Migrant parents face a difficult choice between the economic benefits of their departure, on the one hand, and the emotional or psychological well-being of their children and other left-behind family members, on the other. More often than not, the remaining parent is able to take care of the children. However, when both parents migrate or when a single parent decides to leave for work, children are left behind in the care of grandparents or other close relatives. In worst-case scenarios, children may be exposed to exploitation, abandonment, and institutionalization. As labor migration from developing countries is beneficial not only to the families but also to the state, it may be challenging to institute structures and policies that limit migration, and require a declaration of official guardianship for left-behind children (Castaneda and Buck, 2012; Yanovich, 2013, p. 13).

As part of the effects of maternal migration, the concept of global/ transnational care chain has emerged as a tool for understanding migration and organization of care for families beyond borders. Since women are critical agents in contemporary international migration, scholars have developed new perspectives on the organization of care (Skornia, 2014, p. 19). The gendered division of labor reflects the expectation that women carry the responsibility for the provision of care as primary caregivers both in transnational or employer families, while



men tend to be beneficiaries (Orozco, 2009, p. 4). Parreñas (2005b) emphasized that women from sending countries accepted to replace the care labor due to the failure of non-migrant men to assume the “lost” care labor due to migrant mother’s absence.

Furthermore, Hochschild (2000) introduced the concepts of “care surplus” and “care drain” that support the global economic inequality between the global North and the global South. The perspective presents the deficit or “care drain” that results from importing care from poor to rich countries, by which migrant mothers and their left-behind families are most affected. On the other hand, employers and their children enjoy the benefit of outsourcing care, which results in surplus “care/love.” Economic inequalities also include the disparity in labor and emotional value that contributes to the “global emotional inequality” between mothers and children of different economic backgrounds (Hochschild, 2010, p. 26) and considered an unfairly distributed resource extracted from the global South to the global North.

Social work is a profession involved with different stakeholders of migration (e.g. migrants, families left behind, receiving and sending countries, and the network of institutions involved in these encounters) (Williams and Graham, 2014; Danso, 2016, p. 1750). It requires the development of theoretical analysis and practice models that will respond to the challenges and opportunities via the societal change brought about by migration (Negi and Furman, 2010; Valtonen, 2008; Danso, 2016, p. 1751). The principles of social justice and empowerment should also feature the micro-macro interventions relevant to the needs of the migrant populations, including culturally-sensitive social work practice (Engstrom and Okamura, 2007; Danso, 2016, p. 1751).

The current approaches addressing the needs of the migrant population are considered to be detached from the issues. They are decontextualized from the various influences that shape their lives and their reasons for migration. Social work is often so focused on the immediate needs and the integration of migrants with the new country that it fails to consider the global context of the issues. The classification of migrants based on their status and country of origin contradicts the need for intersectionality and interconnections. It results in the non-inclusion of migrant’s experiences, the importance of family, kinship, community, and a network that would help accommodate the migrant realities, along with the migrant habitus itself (Williams and Graham, 2014, pp. i6–i7).

### **Methods and processes**

The study is anchored in a qualitative and exploratory research design, focusing on capturing the narrative experiences and perspectives of migrant mothers with children left behind in their respective home countries. The method provided

a better understanding of the impact of maternal migration based on the participants' analytical and descriptive experiences, beliefs, learning, or interpretation of the social world (Howson, 2010; Eddles-Hirsch, 2015). The study examined various concerns, where participants served as experts who provided first-hand descriptions involving the provision of care for their children and families. In contrast, social work professionals offered insights on the available programs and services, and recommendations for improving social work practice (Christensen et al., 2010; Gray, Midgley and Webb, 2012, p. 454; Khan, 2014; Eddles-Hirsch, 2015). The end goal of the study was not to provide a generalization but to explore important variables as food for thought (Steinberg, 2004, p. 53) and contribute to further studies.

The total number of respondents was seven: six (6) females and one (1) male, including two (2) migrant mothers with children left behind in their home country (Philippines and Poland), and five (5) social welfare practitioners (social workers and a family assistant) from countries with a relatively large number of female migrant populations such as: the Philippines, China, Sri Lanka, Guatemala, and Poland. The selection of participants was based on the following criteria: 1) the ability of the social welfare practitioners/ respondents to provide information about migrant families in their country, and 2) migrant mothers who are members of so-called 'transnational families,' which Bryceson and Vuorela define as "families that live some or most of the time separated from each other, yet hold together and create something that can be seen as a feeling of collective welfare and unity, namely "familyhood," even across national borders" (2002, p. 18) .

Since the study involved a minimal number of participants, the experiences of the interviewed participants may not reflect the same experiences of migrant mothers from various countries. Similarly, the perceptions of social work professionals in this study may not hold with other professionals working in the social welfare sector, especially with the wide range of socio-cultural differences across different countries.

## **Results and findings**

### **1. The costs and benefits of maternal migration**

A universal aspect of the migration culture is the belief that under specific circumstances, people migrate because "the situation forces them" to do so, which means that unemployment is a motivation for emigration (White, 2010, p. 559). The parent's decision to work abroad involves making a difficult choice between the emotional and financial well-being of the family, especially the children left behind (Yanovich, 2013, p. 13). In addressing the challenges or issues of left-behind families and children, we must understand the social and emotional costs of family separation.

### a) *The Importance of Remittances*

One of the benefits of labor migration is the remittances sent by parents to their families in the home country. They represent an improved financial situation for a family, which translates into the provision of needs and wants in terms of better education and improving health (health care, food & nutrition) (Nguyen et al., 2006). “I work abroad for my children’s future, to provide their needs, to save up for their education and to be able to build our house, which is not yet finished, but almost,” stated the Filipino Migrant Mother interviewed in the course of the study.

The remittances encompass the economic and emotional dynamics of transnational families. The connection between the economic factors and the emotions involved is referred to as “emotional remittances.” This includes the socio-cultural values, ideas, and physical items sent by the sending or receiving family members. It suggests that emotions of love, concern, guilt, and sacrifice are intrinsically embedded in remittances, thereby making “true remittances” emotional (Katigbak, 2015, p. 518).

The money I send to my family shows my love and concern for their well-being. It is hard because I’m far away, but they understand because they know I’m doing this for them, so it gets easier. I’m happy because they are in school and they are well cared for. (Filipino Migrant Mother)

In addition to the importance of providing financially, the Polish mother cited a lack of good opportunities in the home country to support her and her children. The lack of opportunities in her field and Poland’s accession to the EU has provided her with a chance to improve their standard of living and achieve professional development.

It’s mainly for economic reasons. I am a single parent and have been for 18 years. At that time, I felt like there were no good opportunities in medicine for me here, and my country was not supporting me as a single mom. When given a chance to practice my profession abroad that would enable me to provide the quality of life I want for my family, I immediately grabbed it. (Polish Migrant Mother)

Although discussions on the effects of labor migration on children left behind are present in the existing literature, the adverse effects are minimized due to the positive economic impact of remittances on receiving countries.

### b) *Change in Family Dynamics*

Maternal migration causes significant changes in caregiving or upbringing practices and investments in the family. When a mother decides to leave, the children remain in the care of the remaining parent (father) who is responsible for taking care

of the material, emotional and social needs of the children. It results in the reversal of traditional gender roles within the household and affects the nature of parenting.

At first, my husband oversees and takes care of the children, making sure my children eat well, go to school, and are safe. Although he still goes to work, he makes sure that my children are doing well. All the things I do as a mother, he tries to do them himself. (Filipino Migrant Parent)

Although fathers may try to take the role of both parents, the existing cultural and patriarchal mindsets may hinder them from performing tasks associated with “mothering.” Thus, families may need additional help from extended family members, usually female, to take care of the children’s needs. In the absence of female extended family members, families get hired help, or leave the younger children behind in the care of older siblings or by themselves, thus taking on the responsibility of caring for the entire household. (Castaneda & Buck, 2011, p. 102).

The hiring of “house help” illustrates the change in the social division of wealth, social status, and class with the need of migrant families or mothers to ‘outsource’ their responsibilities to another woman from a more impoverished background, especially in caring for their left-behind children (Hochschild, 2003, p. 131). This cycle or chain of care is repeated a few times with its value decreasing at each subsequent level, all the way down to unpaid care labor (Skornia, 2014, p. 21).

My children are older now, so they take care of themselves. I also pay someone who looks after them occasionally, like cleaning the house and doing the laundry. Their grandmother and aunt are also available during emergencies. (Polish Migrant Mother)

Although the Filipino migrant mother did not refer to the separation as the cause for the breakdown of her marriage, she believed that it brought additional tension to their already problematic relationship.

My husband works as a truck driver during the day while the kids are in school, and he comes home at the end of the day. The children help with household chores, but they also hired the neighbor to help out. It turns out the hired help was my husband’s mistress. He had to abandon my children to flee when the woman’s husband hunted him down. (Filipino Migrant Mother)

In addition to the testimony, a social worker from Sri Lanka also stated that there is a chance that some fathers may enter a new relationship during the mother’s absence. It later leads to the complete separation of the family and the emergence of a new ‘marriage.’ As put by Asis et al. (2004), while it is challenging to prove the connection between migration and infidelity, studies provided examples where migrants attributed keeping their relationship with their spouses despite the distance to increased or continuous communication.

Then again, the respondents believe that constant communication and modern technology allow them to avoid disconnection with their family members. Although continued communication is essential, this does not guarantee to prevent problems within the family.

Sometimes, I talk to them or call and ask them how they are doing and try to parent (discipline) them from afar. I know my words are not enough because I'm not there, so their grandmother is the main responsible for being a parent. Sometimes she is hesitant to reprimand my older son, as there are times he refuses to go home due to all the "lecturing" he receives. I call my son and ask him why he does not go home and talk to him about being respectful to their grandmother, and give him more advice. (Filipino Migrant Mother)

### c) *Children's Exposure to Various Risks*

The examined social workers and migrant mothers have argued that children, including youth, are vulnerable to exploitation, abuse and negative social behavior without adequate supervision from parents, particularly mothers. According to Yanovich (2013, pp. 8–9), in addition to dealing with the parent's absence, children become socially vulnerable to neglect, abuse, discrimination, exploitation from neighbors and even relatives. It also results in older children taking on additional duties to support the remaining parent/guardian in caring for the younger siblings or the entire family.

My older son told me they had to sleep on the street, and that what hurt more was that they had relatives in the area that might have been able to take care of them, but they wanted me to send money to take care of the kids. I was angry because they considered money first before taking care of their nephews. Due to arguments about money, they took the kids to DSWD (social welfare agency) and told them that the kids were abandoned, and that they were not the relatives of the children. I had to file a case to claim my children back. I sent money, the power of attorney so that my mother could get my kids back. It took weeks before she could get my kids. I blamed myself for leaving my children behind with my husband, all for the dream of having a complete family. (Filipino Migrant Mother)

In addition to abuse and exploitation, social workers argued that left-behind children are at risk of risky behaviors such as alcoholism, teenage pregnancy, school delinquency, and criminal activities. As stated by Filipino Social Worker 1, "Due to the lack of guidance and care from mothers, children and youth are at risk of being in conflict with the law."

The above claim is supported by the studies contending that, after the mother's departure, children have difficulty adjusting to her absence and may display rebellious behaviors and activities. Although mothers may try to increase the frequency of communication to compensate for their absence, the negative actions of their children create feelings of guilt and inadequacy for leaving their children behind (Mazzucato et al., 2015, p. 216).

When they grow up, they lack certain values, and they get involved in drinking, smoking, teenage pregnancy, school delinquency, etc., especially in the Guatemalan culture, where mothers have to bear the bulk of responsibility for educating their children. During the mother's absence, the children are left without guidance, with no one to take care of them emotionally and monitor if they attend school and do their homework. It is very challenging for children to finish education whenever the mother is not there. (Guatemalan Social Worker)

The Polish family assistant also stated that, in her experience, the father's low competencies might contribute to upbringing problems. In the absence of the mother due to work abroad, the father needs assistance in providing care for the child. This requires additional help from social services to be able to meet their daily needs and ensure the child's safety and protection.

For sure, these are educational care and upbringing issues caused by the father's low competences. I'd also like to add that he suffers from multiple sclerosis and works despite his illness. He also has problems with dealing with administrative issues. For example, he has no idea which authority he should turn to so as to deal with the formalities, and he is unable to write an official letter or application, so he has problems with dealing with matters of everyday life. There's one more important thing: this man has a huge problem with keeping his home clean, so it is messy. (Polish Family Assistant)

#### d) *Incurred debts*

While labor migration reflects the migrant's commitment to improving the family's situation, it may also negatively affect the potential to raise their financial status. As there are two households to be supported: that of the migrant(s), on the one hand, and that of the left-behind family members, on the other, there is a possibility that little to no savings will be set aside by the family due to the incurred cost of migration (debt) and the demands of the family left behind (Catsaneda & Buck, 2011, p. 99; Yanovich, 2013, pp. 11–12).

I had to pawn my small piece of land so that the family could move together. I had to save money to get it back while also providing for their everyday needs. I am also aiming to finish the house we started to build, and delay going back home so that we can finish the construction. (Filipino Migrant Mother)

Due to the debts incurred before migration, most of the income during the initial months of employment is dedicated to paying off debts. Thus, migrant parents are unable to thoroughly enjoy the financial benefits as there is a need to pay the costs incurred in the job application process, such as the application costs, medical expenses, insurance, visa fees, transportation costs, relocation costs, among others (Antman, 2013, pp. 22–23). As exemplified in the interview, plans for returning home for vacation may also be abandoned to improve the family situation, e.g. house construction.

Similarly, Guatemalans who decide to travel northward for work also invest a lot of money in their journey across borders. “As migrating to another country is expensive, the families have to get enough money to finance their migration. This multiplies the debt which needs to be paid before finally reaping the benefits of remittances for the family,” stated the Guatemalan Social Worker.

According to Smolarek (2007), this includes employing ‘coyotes’ to smuggle them across borders. Although there is no assurance of successfully crossing the border safely and with a high risk of deportation, Guatemalans choose to cross illegally, which is still considered cheaper. The prospect of better job opportunities is a big motivation for pursuing migration despite the challenges they may face along the way.

## **2. State and non-state responses to issues of children left behind**

Following the issues cited by the different respondents, this study aims to identify the various available programs and services that address the said problems of families and children left behind. It intends to understand how government and non-government welfare agencies determine the course of action and the roles and responsibilities of social work professionals. The social work professionals interviewed for the study enumerated the circumstances where social workers needed to intervene, and the varying practices or interventions based on the country’s context.

The interviews established the belief that labor migration is considered a positive step for families, mainly as it provides employment. Moreover, the country’s economy also benefits from remittances as a reliable source of foreign exchange argued to be more stable than private capital flows and is considered as a self-insurance mechanism by enabling the diverse source of external finances (Sharma, 2010, p. 556). Therefore, the impact of labor migration or maternal labor migration on children and families left behind is rarely seen as a governmental/ social issue. The responsibility to provide for the family is considered to fall on parents, and their departure for work is not considered a negative implication but is even encouraged. The government prioritizes poverty alleviation over the long-term psycho-social impact of migration on children and families left behind. As noted by the Chinese Social Worker, “These issues (challenges experienced by CLB) are rarely addressed since bread-earning is still the primary task for the parents.” On a similar note, the Guatemalan Social worker stated that:

The reason why vulnerable families do not get protection, and why the issues of children left behind are not addressed, is because it is not viewed as a problem. The fact that the mother leaves to work [abroad] means that they (the family) will get money, and is a good thing. It is a motivation for children to pursue [migration] someday as well. Culturally, it is not a social problem, and the government does not assume the responsibility because it is considered a non-issue. (Guatemalan Social Worker)

Since the government encourages labor migration among its citizens, it aids laborers who plan on working outside the country.

There is a law in Guatemala that provides support to the immigrant leaving the country and an organization [run] by Brazilian priests that provides shelter for the people who leave, but not for the ones left behind. The organization is called “the house of migrants.” In the case of children left behind, I don’t think social work is involved with them. However, social work is involved in other issues of children and young adults such as alcoholism, teenage pregnancy, etc. which may also result from the absence of a parent, especially a mother. (Guatemalan Social Worker)

The reluctance to acknowledge and address the effect of maternal migration on children and families allows the government to divert its focus to addressing other issues that may be an indirect effect of maternal migration, e.g. teenage pregnancy, juvenile delinquency, alcoholism, among others. According to Filipino Social Worker 1, “The government focuses more on other issues of children such as juvenile offenders, child labor, street children, etc. We may also relate these issues to the migration of mothers.”

### 3. Grounds for intervention

Although some countries do not recognize the issues of children left behind as priority issues, the respondents elaborated on the circumstances where social welfare should intervene despite the lack of focus. They cited the need to address concerns in upbringing, neglect, violence and abuse, and natural disasters, among others, regardless of family background.

I think social work should intervene when certain traumatic circumstances happen in the family. These include natural disasters, severe diseases, domestic violence, substance abuse, gambling problems, and any other incidents causing a serious psychological disturbance. (Chinese Social Worker)

Social work practitioners also stressed the importance of preventing the need for citizens to migrate for work, or improving education and health services and providing psychological assistance to families who are left behind.

In the Philippines, labor migration is still an issue that families deal with. At the micro-level, social workers can probably help children in schools adjust to the changes in the family when a mother leaves to work abroad. (Filipino Social Worker 2)

Nevertheless, some countries have acknowledged the need to address the issues of children left behind, especially those in their early years. In China, economic development has resulted in massive internal labor migration from the rural-based agricultural sector to the urban-industrial sector. However, due to the institutional



constraints imposed by the household registration system (Hukou), where every citizen needs to register at the place of permanent residence and occupation, the access to public services remains deeply tied to the household registration which is to the disadvantage of migrants (Démurger and Xu, 2015, pp. 1–2).

As a response, non-government organizations with the support of local governments have introduced programs for children left-behind.

Some NGOs, in cooperation with local governments, start to explore addressing needs other than the economic/financial ones. For example, 歌路营 (Ge Lu Ying) is an NGO which focuses on the issues of education for left-behind children attending rural boarding schools. They aim to improve the quality of education with innovative methods and provide training for teachers and volunteers working with left-behind children. In addition, 儿童防侵 (Er Tong Fang Qin, a project financed by the Ai De Foundation sends volunteers to schools to give lessons to students on how to protect themselves from sexual abuse, child trafficking, campus violence, natural disasters, and other accidents related to children. Additionally, counselling centres are set up in some schools with the support of local governments. (Chinese Social Worker)

In the Philippines, Executive Order No. 287 of 2004 mandates the Department of Social Welfare and Development-Social Welfare Attaché Office (DSWD-SWATO) to designate social service attaché officers at foreign outposts with a large concentration of Overseas Filipino Workers (OFWs). The social welfare attachés are responsible for providing counsel, and legal and welfare assistance to OFWs (Gov. ph, 2004).

Under the Department of Social Welfare and Development is the Social Welfare Attaché Office (SWATO). SWAs are diplomats sent to countries with a large number of OFWs. Also, a program for children left behind by parent migrant workers is currently being conceptualized by the DSWD-Social Technology Bureau. This will involve further in-depth study of the situation of children left behind and formulate necessary services for various needs. (Filipino Social Worker 1)

In Sri Lanka, the massive migration composed of women, many of whom are mothers, resulted in a significant number of children left behind who are directly affected by the phenomenon. The Sri Lankan government recognized the possible harm experienced by children left behind, including disruption of family relations and diversion from education, as children perform the domestic roles formerly discharged by the absent parent. The psycho-social effects of loneliness and abandonment, and the heightened risk of child labor or abuse from alternative carers, are also observed (Jayasuriya and Opeskin, 2015, p. 579).

As several problems arise as soon as the mother departs, especially among the children who are vulnerable when left without maternal care, the Sri Lankan government worked through various agencies to prevent and address these issues: the Ministry of Foreign Employment

Promotion and Welfare (MFEPW), the Sri Lanka Bureau of Foreign Employment (SBFE), the National Child Protection Authorities, the Department of Probation and Child Care, the Police-Women and Children Desk, the Divisional Secretariat Office, and the Grama Niladhari (village officer). Aside from government agencies, various international NGOs (UNICEF, World Vision, Child Fund) and local community-based organizations (Village Child Development Committees/Village Child Rights Monitoring Committee, Rural Development Societies) are also active in the sector. (Sri Lankan Social Worker)

As a response, several domestic laws and policies were enacted to aid the rights of children left behind. These policies require various government authorities to work together to address the issues of maternal labor migration. The government issued a series of circulars that attempt to regulate the migration of mothers. Circular 13/2013 aims to minimize the psycho-social costs of migration on children of female migrants. Mothers are required to obtain a Family Background Report (FBR) from the Ministry of Foreign Employment Promotion and Welfare (MFEPW), which stipulates reporting requirements for women migrating for employment. According to the FBR, women with children under five years of age are “not recommended” for foreign jobs. However, mothers with children over five years of age were required to obtain approval to migrate from the government after providing evidence that children left behind would have access to appropriate caregivers (Weeraratne, 2014; Jayasuriya, R. and Opeskin, 2015, p. 599).

As the mother is the child’s primary caretaker, the focus should be on preventing the mother from migrating. There are various levels of intervention when the mother is planning to migrate for work; the family is forcing the mother to migrate; the mother is seeking a certificate from the Grama Niladhari to submit to the relevant authorities and with females/mothers gearing up for departure at the airport. (Sri Lankan Social Worker)

Furthermore, as migration is considered a response to poverty, the government also implements social assistance programs to alleviate poverty among families. These include income-generating activities and other forms of assistance that will create opportunities for families, especially women.

Most of the mothers migrate due to poor income generation. Therefore, the government provides various programs in support of their needs: school feeding programs for children, student loans, livelihood support and social welfare assistance via government schemes, i.e. the Samurdhi Program. (Sri Lankan Social Worker)

The Samurdhi Program is a social assistance program aimed to reduce poverty and create opportunities for youth, women and other disadvantaged sectors in society. It is made up of three components: consumption grant transfer (food stamps); savings, credit (Samurdhi banks) and loans for small scale entrepreneurs; and, lastly, rehabilitation and development of community infrastructure

through workfare and social (or human) development programs. Notably, social development programs include “illiteracy elimination” by means of Samurdhi scholarships. It also offers plans and services for senior citizens, the disabled, the destitute, and alcoholics, along with a narcotics prevention scheme (Glinskaya, 2003, pp. 1–16).

#### 4. Limitations in social work action

One of the objectives of this study is to determine the barriers to social work action regarding the issues of maternal migration and children left behind. According to the respondents, social workers act on behalf of the state and the organization. It creates a limitation on implementing services that are bound and mandated by the organizational policies and practices. As observed by Filipino Social Worker 2, “I can only do as much as what our agency mandates. Beyond what is required of us, we do not have the power to intervene.”

As some societies do not recognize the urgency to address maternal labor migration, the absence of available resources for children left behind leaves social workers blind to finding solutions to the said issues. The state focuses on the positive impact of remittances on families rather than its negative impact on the psychosocial health of children.

Culturally, Guatemala is not a country that works in prevention, not only in this field; we tend to worry about the effects instead of the causes of things. Even though the costs of these effects are much higher than prevention, the latter is not seen as a priority. There is no social compromise on the problem. Hence, even though they sense this is an important issue, social workers feel that their hands are tied because there are no policies that support or offer any type of benefits or programs to address this issue. (Guatemalan Social Worker)

Granted, some countries may have programs and services for the said target group in place, yet there are still various structures that limit the implementation of these services, including corruption and the lack of support from communities. As migration promises a better quality of life, families prefer to violate the set regulations regardless of the consequences.

Bribe and Corruption—Grama Niladhari may provide approvals for requests with a bribe. At the airports, if you bribe the airport officials, they will allow you to leave. The mothers obtain fraudulent certificates to show that their children are grown up or that they do not have children. Since government or NGO assistance is not enough, mothers nonetheless end up leaving for abroad despite receiving the assistance. (Sri Lankan Social Worker)

Local support for the available programs and services may also be minimal, as they do not recognize the importance and relevance of the said actions.

People's perception of services is also very important. If we don't do enough outreach work to raise their awareness, they won't trust us, or they might misunderstand what we do. Therefore, gaining the support of the local community is also essential. (Chinese Social Worker)

## Recommendations

### 1. Understanding and raising the issues of children left behind

As mentioned above, remittances prove to be very important in maternal migration. However, this also shows that while remittances help improve the financial situation of families, they do not necessarily lead to the overall improvement in their well-being, especially with respect to children. Social workers and migrant mothers alike have mentioned various issues that families and children face when mothers migrate for work. Granted, several studies have identified the said psycho-social and cultural effects. Still, the research findings show that the prevailing belief is that, although there are adverse effects of maternal migration, the financial contributions of remittances are considered more important to the family.

It suggests a limited understanding of the impact of maternal migration on families and children left behind, as well as the role of social work in addressing these issues. Therefore, there is a need for more comprehensive research on the current situation of children left behind from various cultural backgrounds, including the current practices and the ways in which policies, structural barriers, and culture limit social work action.

With the support of well-established research and support from various institutions, social work can contribute by bringing the said issues to the attention of civil society. The ability to raise these issues will enable progressive changes in international and local policies and services, which will help manage migration in a way that may eradicate, if not minimize, its adverse effects, while also advancing the well-being of migrant women and children left behind. Raising the awareness of the issue includes analysing the political, economic and normative contexts in various countries. The increase in the social work research on maternal migration and children left behind will strengthen the promotion and awareness of the issue and point out weaknesses in international and local policies that supposedly protect children and women. As exhibited in this study, each country's social welfare prioritizes the issue at different levels and operates in different ways. Comparing countries may help identify the common factors that affect transnational families despite cultural differences. This will also enable the recognition and adoption of best practices from other countries, and the indigenization of social work responses to address the attendant issues based on local contexts appropriately.

As also mentioned in the findings, there is minimal support from the government and other NGOs in addressing issues of maternal migration, since the importance

or relevance of said actions is considered minimal, too. With the data collected in the course of extensive research, social work will advocate and raise the awareness of the impact of the phenomenon based on the real-life experiences of migrant mothers and family members left behind. Organizing or participating in events for women migrants and children left behind will create a venue for awareness-raising campaigns that will be effective and efficient ways of communicating information. The use of various Information, Education, and Communication (IEC) materials, and Social and Behaviour Change Communication (SBCC), will help disseminate information to the public, and generate support and action from communities, the government and civil society organizations. This will improve communication and enable the exchange of ideas to enhance further understanding and mobilise the resources required to bring about structural and political changes that will strengthen the existing interventions.

## **2. Social work programs and services improvement**

Guided by extensive research on the current circumstances of migrant families and children and the recent responses available, social workers will be able to understand the varying contexts across different countries and cultural backgrounds. It will allow social workers to identify and prioritize the needs for program development, and formulate ideas on how the government may improve the existing responses.

As mentioned in the study, there is a lack of organizational partnerships that enable the provision of comprehensive services to children left behind. The establishment of continuous services will serve as a positive strategy in minimizing the negative impact of migration and curtailing corruption through the transparent flow of services supported by local, national, transnational policies and partnerships between sending and receiving countries. Therefore, international social work entails a more critical view of the prevailing approaches, including the policies and practices in protecting the rights of children and women migrants, cultural sensitivity and competence, preventive strategies, and critical social work approaches. Effective responses rely on local and international inter-agency collaboration and partnership, strong advocacy and policy lobbying. They require micro-, mezzo- and macro-level actions that promote social work values of social justice, human rights, and professional integrity.

Social welfare professionals from various organizations and countries must develop structures that encourage cooperation, partnership, and recommendations to allow the continuity of services and minimize corruption and exploitation. Such collaborations may be antecedent to the development of a platform for the exchange of ideas, while also facilitating collective action not only at the local level but also that of international partnerships between the respective countries' governmental welfare programs. The cooperation between sending and receiving countries will ensure the protection of migrant women and continuity

of services provided for the protection and promotion of their rights, and the needs and rights of children left behind.

### 3. Promotion of children's and women's rights: finding a balance

One of the goals of this study is to explore the informed and balanced social work action that considers the needs and rights of both women migrants and children without prioritizing one group over the other.

As exhibited in Sri Lanka, the emphasis on protecting children's rights is attributed to the domestic policies that regulate the migration of women. Study results emphasize the adverse impact of maternal migration on children left behind. As a response, the Sri Lankan government initiated the implementation of restrictions on female migration and the provision of alternative livelihood programs and social welfare assistance. However, it may be argued that the restrictions on women's migration are discriminatory and violate women's right to migrate. They perpetuate control over women, along with the tolerance of negative situations at home and sustained promotion of corruption and bribery. This state of affairs also raises the issue of whose right should be given precedence: the mother's right to work or the child's right to be raised by its mother. Although the Sri Lankan authorities suggest that said restriction is non-discriminatory, further analysis of said policies and similar guidelines is needed.

One realization resulting from this study is that there is a need to explore the measures of discrimination of women or children based on the currently implemented programs, services and policies, not only in sending countries like Sri Lanka but also in receiving countries and their respective migrant labor policies. Addressing the discriminatory nature of these policies will help social work address the attendant issues holistically and provide better opportunities, ensure safe migration for mothers, and protect and promote the rights of women and their children. This requires extensive analyses of the rights of both women and children in relation to maternal migration, and a framework to be used for the optimal protection of their rights. The problems arising in sending countries need to be solved by public social workers, and require support and action in receiving states to necessitate change. Only when social work representatives from various countries work together at the bilateral and multilateral levels shall we achieve the results that will mitigate the adverse effects of maternal migration on children left behind and migrant mothers themselves.

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## Streszczenie

### Praca socjalna wobec kwestii migracji zarobkowych kobiet oraz sytuacji ich rodzin i dzieci

Migracja zarobkowa jest uważana za cykliczny i powtarzający się process w różnych częściach świata i wynika z różnicy między kosztami a korzyściami z niej płynącymi. Często kompromis między kosztami a świadczeniami ma największe znaczenie dla migrantek ze względu na ich pozycję w rodzinie jako głównych opiekunek dzieci oraz ich podatność na zagrożenia w społeczeństwie. W artykule ukazano badania nad zrozumieniem wpływu migracji matki na pozostawione rodziny i dzieci oraz dostępne dla nich strategie pracy socjalnej. Badanie pokazuje, że chociaż przekazy pieniężne migrantek są bardzo korzystne dla rodzin, nie można lekceważyć negatywnych implikacji dla dzieci i dobrobytu rodziny. Chociaż niektóre kraje ustanowiły wsparcie dla kobiet, ich rodzin i dzieci, nadal istnieje potrzeba lepszego zrozumienia czynników społeczno-kulturowych i politycznych, które wpływają na działania społeczne. Dlatego ważne jest prowadzenie dalszych badań w celu zidentyfikowania luk w polityce i usługach oraz opracowanie bardziej odpowiednich mikro, mezo i makrointerwencji, które wykorzystują dwustronną lub wielostronną współpracę między różnymi lokalnymi i międzynarodowymi podmiotami pracy społecznej. Na potrzeby badania określenie "pozostawione dzieci" dotyczy dzieci, których rodzice wyemigrowali (migracja zewnętrzna lub wewnętrzna) do pracy i pozostawili je w kraju rodzinnym lub społeczności lokalnej. Mogą pozostawać pod opieką współmałżonków, krewnych, przyjaciół lub samodzielnie.

**Słowa kluczowe:** pozostawione dzieci, rodziny pozostawione, migracja matek, kryzys świadczenia opieki, opieka społeczna

## Working with Street Children through Capabilities Cards

### **Abstract**

The study presents the results of the explorative research with street connected children in Warsaw. The capabilities cards were created by the researcher as tools for communication with children utilizing the list of central human capabilities as created by Martha Nussbaum and are a unique operationalization of the approach in social work with vulnerable populations.

Employing qualitative methods, the aim of this study is to hear street connected children's voices about their capabilities and wellbeing and to test whether the use of language of capabilities can help the children to understand better their wellbeing and aspirations.

**Keywords:** street children, wellbeing, capabilities, social work practice, participatory research

### **Introduction**

This research project aims to investigate how the children who are labeled “street children” understand the concept of capability and how applying the capabilities approach in social work practice would broaden the informational space about service users, allow the voices of service users to be heard, and build a platform of dialog between service users and social workers increasing the empowerment component of social work practice.

This project involved research conducted from the social work perspective to contribute to the development of research-based practice, and in that aspect it focused on the situations experienced by children receiving services and social work interventions. The project was conducted with two groups of street connected children in the Warsaw district of Praga.

On the one hand, the research is congruent with the critical stance in relation to the globalization of social work, as expressed by Webb, who argued that “social work is best done by paying attention to particular persons in locally

situated reflexive situations” (2003, p. 202); on the other, the aim is to argue for more humane social work or, in other words, “a humanistic practice of social work that focuses on such positives such as common human capabilities in practitioners’ shared humanity with their clients” (Payne 2011, p. xi). This study also refers to social pedagogy as developed by Janusz Korczak in the beginning of the 20<sup>th</sup> century as an example of indigenous knowledge that can be applied in international social work. The research also applied the capabilities approach in theorizing the phenomena of street connected children and thinking about social services in order to achieve a more humane social work practice locally.

As a practice-oriented study, the project was designed to constitute what is classified as research from practice (Orme and Shemmings, 2010) in which research activities are grounded in everyday practice with children. By using the concept of capabilities, the children and the practitioners can deepen the understanding of the children’s wellbeing while adding the emerging knowledge about the areas of deprivation in children’s lives. This study applied an innovative method in social work research in the form of capabilities cards to achieve participatory status and hear the voice of children philosophizing about their well-being, stating their views on what constitutes a good life, and developing their understanding of well-being in the context of street-connectedness.

### **Theoretical background and research contexts**

#### **Street connected children: global actors and global perspectives**

The phenomenon of street children has been researched all over the world and from the international outlook it appears that there is no immunity to this multi-layered social issue either in the global South or in the global North. International social work has a very important place in actively adding to debates about street children and the conceptualization of the issue worldwide. International social work has a long and complex history in the broad area of children welfare, in which street children were always present (albeit sometimes hidden) under the umbrella of various social problem discussions such as child labor, child neglect, and children poverty, since the beginning of the last century.

The perceptions of the phenomenon vary between the global South and the global North in terms of definitions, statistics, and interventions. Firstly, there are numerous definitions ‘awarded’ to street children that have been changing historically and geographically. The global perception of street children is complicated by the variety of definitions and terminology ranging from street children, homeless children, children on and off the street, to very broad categories such as poor and disadvantaged children. Definitions of street children have been changing in response to the evolving conceptualization of childhood, with the overarching tension between protection and self-determination of children (Karabanow 2003:, p. 370).

The global context for street children is created through work, research and guidelines prepared by organizations such as Aviva and the United Nations Children's Fund (UNICEF), the Office of the High Commissioner for Human Rights (OHCHR), globally involved NGOs such as Consortium for Street Children (UK-based), and the European-based Dynamo International Street Workers Network. In this context, street children are described and analyzed through the lens of the human rights approach.

The human rights approach (HRA) to street children dates back to when the Commission on Human Rights used the term 'street children' for the first time in 1994 defining "children on the street" as those who work on the street but have a home and spend time with their families at night, and "children of the street" as those living on the street all the time with none or fragmented links to their family (OHCHR, 2012). The human rights approach to street children changes focus from needs to rights and starts from the premise that all children are "rights holders." All children, irrespective of their economic status, race, color, sex, language, religion, national, ethnic or social origin, property, disability, birth or any other status have the same rights and are entitled to the same protection by the State" (OHCHR 2012, p. 7).

The term "street connected children" that is currently advocated by the Consortium for Street Children (CSC, 2015), a leading NGO on the international arena, is more accommodating to the enormous heterogeneity of this population all over the world, and employs some connections to the street as an overarching characterization. Street connected children are defined as follows:

"Some live on the street; some work on the street; some street children maintain relationships with their family whereas others break all contact; some are on the streets currently and some are off the streets but could be easily drawn back there. All of them have strong connections to the street" (CSC, 2015).

"Street connectedness" shows that children have some relationship with the street; while not the only reference point for their development, it plays a significant role in their lives and identities. This study will therefore use the term street connected children and further add to the understanding of the term by exploring how street connectedness impacts children's wellbeing and how the international social work ideal of achieving social justice could be realized in practice with street connected children.

### **Polish context for the participatory project**

The concept of childhood varies between cultures and generations. Poland is often described as a country in transition from a communist-regulated state to a neoliberal capitalist country, with the ambition to adapt, as a member of European Union, to the European standards of living. The transformation has been especially visible

in the growth of inequalities between regions, communities and individuals. It has been a popular view that Poland is divided into two parts, A and B, with part B (East and South East of the country) being significantly poorer, however the disparities are now more visible in the cities with many people unable to keep up with the fast and competitive lifestyle. This understandably results in the growth of inequalities among families, with children bearing the consequences in the form of insufficient resources, inadequate housing, followed frequently by family violence.

Poland had one of the highest (third behind Bulgaria and Romania) multidimensional deprivation headcount for children under 16 among the EU countries (and Norway) as measured by the MODA – UNICEF Innocenti Research Centre (2015). Specifically, more than three-quarters (79.3%) of school-age children are deprived in at least one dimension ( education, information, water, sanitation, and housing and nutrition) while 32.7% are deprived in only one dimension, 41.5% are deprived in two to five, and finally 5.1% are deprived in six or seven dimensions simultaneously (UNICEF IRC 2015).

Despite ratifying the CRC (Convention of the Right of a Child) in 1991, Poland is still criticized for not having a coherent social policy for children alongside with transparent budget for children welfare, and a pervasive lack of respect for the children's' views and opinions. UNICEF Poland has published a report about the progress (UNICEF Polska 2014) Raport Alternatywny Polskich Organizacji Pozarządowych (RAPOP) of the Convention of Children's Rights that finds many areas of insufficient rights realization for children in Poland. Compiled by 12 leading non-government organizations in Poland, the report clearly indicates that the ratification of the convention is only the first step towards the betterment of children's lives. The report notes that many of the recommendations for Poland prepared by the Committee of the Right of Children in 2002 were not followed by the state, for example there is no common strategy for a coherent policy on spending for children, as the respective ministries of the government have their own independent budgets. It is also unknown whether any spending in their budget is effective, since those activities are not monitored. The report discusses many concerns in the current situation of Polish children, including the problems in the legal system, child protection system, and education system. The most disquieting information concerns the increase in children's poverty and a consistent lack of respect for children's views and opinions across all domains of public life in Poland. This is especially valid for children from the families who were left behind in the post-communism transformation process and who now face poverty that is comparable to developing countries.

All those issues show many inequalities in Poland under the existing strong culture of protecting the family while perceiving the children as not fully developed human beings that may need protection but lack agency.

The approach to children as not fully human beings has been criticized in Poland at the beginning of the 20<sup>th</sup> century by the school of pedagogy created by the

now-famous Janusz Korczak (Henryk Goldstein). The author of *The Child's Right to Respect* expressed a strong view that the child is not a potential, future human, an expectation, but rather a human in its own right, as he or she is at the present moment, being himself/herself, exploring, experimenting, searching, and suffering (Korczak, 1967).

### **The characteristics of the capability approach: introduction**

The capability approach (CA) as developed by Sen in economy and Nussbaum in philosophy may be best introduced by Qizilbash, who states that “the capability approach invites us to see things in a different way, by focusing attention on certain sorts of information” (2011, p. 14) to conceptualize poverty, inequality, and well-being. The CA is perceived as general framework to evaluate well-being and has been the most used in the writings and research on human and economic development (Foster and Handy, 2008, p. 2), in which the development is seen as the process of “expanding capabilities, or giving individuals the freedom to realize more and better functionings” (Foster and Handy, 2008). The CA advocates the turn from focusing on income growth towards analyzing and understanding the complex pathway from growth to individual well-being.

Sen envisions the capability approach as a framework for human development, “a process of enhancing human capabilities - to expand choices and opportunities so that each person can lead a life of respect and value” critiquing the income based view of poverty and development (Sen, 1984, 1999). Sen focuses on what a person is actually able to do or be in practice, regardless of the inputs in terms of the availability of material necessities or the existence of rights backed by custom or legislation (Sen 1984, 1999). Sen contends that each capability represents the ability to achieve a specific doing or being, which he dubbed “functioning.” The main idea is to expand people’s capabilities—their freedom to promote or achieve functionings which are important to them. Functionings are defined as the valuable activities and states that add to the creation of people’s well-being such as having a healthy body, being safe, or having a good job (Sen 1984, 1999).

They are related to goods and income, but they describe what a person is able to do or be as a result—for example, when a person’s need for food (a commodity) is met, they enjoy the functioning of being well-nourished. Capabilities are understood here as some specific amalgamation of functionings that a particular person can achieve or, in other words, “the substantive freedoms” that a person can be granted to be able to live a good life, the kind of life he or she values (Sen, 1999, p. 87; Robyens 2003).

Sen also stated that the capability approach takes into consideration that different individuals, especially the disadvantaged may need different quantities of resources if they are to achieve the same level of ability to choose and act (Sen, 1999; Robyens, 2003).

When it comes to people's well-being and development, these can be understood as "their (people's) effective opportunities to undertake the actions and activities they want to engage in, and be whom they want to be" (Sen 1984 in Robyens 2003, p. 17). Sen refers to those beings and doings as functionings (working, resting, being literate, being healthy, being respected, being part of a community), and argues they make our life valuable. The whole well-being is integrated and comprehensive, and "much attention is paid to the links between material, mental, spiritual and social well-being, or to the economic, social, political and cultural dimensions of life" (Robyens, 2003, p. 7).

Because the capabilities approach is often described as "radically unspecified" (Anand and van Hees, 2006), it is often complemented by contributions to its concepts and definitions by other authors and researchers, e.g. the concept of an extension of capabilities. For example, Foster and Handy argue that people can benefit from the capabilities that are placed externally, that is in the people who are around them, and with whom they come into contact; this is known as the concept of "external capabilities," which are defined as "those abilities to function that are conferred by direct connection or relationship with another person" (Foster and Handy, 2008, p. 1). This concept will be used in the analysis of this project in the context of children as service users of street working services.

### **The current applications of the capability approach in research with children**

There are numerous applications of capability approach in assessing small and large scale development, identifying the poor in developed countries, assessing poverty and wellbeing, highlighting the deprivation of disabled people, and assessing gender inequalities (Alkire, 2012). Application attempts were also made in debating policies, critiquing social norms, practices and discourses (Alkire, 2012). Most of those studies apply to adults, as there has been an ongoing discussion in the literature on how to choose and define capabilities (Addabbo et al., 2014), especially in relation to children. Andersen and Fegter (2010) discuss the application of the capabilities approach in children studies, pinpointing to its future potential but agreeing that the capabilities approach should take a systematic account of the reality of human dependencies (Andersen and Fegter, 2010, p. 9).

There are quantitative studies using the capabilities approach in relation to children's wellbeing, functionings and (sometimes) capabilities. For example, Phipps' comparative study of children's functionings in physical health in Norway, Canada, and the USA found high level of well-being in Norwegian children (2002).

Measuring poverty and capabilities deprivation allows one to consider non-material aspects in children's live, for example love and care as it was shown in the study by Biggeri, Trani and Mauro analyzing children poverty in Afghanistan

(Biggeri et al., 2010). Moreover, when poverty is seen as deprivation of capabilities and achieved functionings, the dimensions come to play an important role for the conceptualization of policy and interventions. Addabbo et al (2014) found that parents' education is an important factor in developing the capability of senses, imagination and thought in children and that parents' education positively impacts the capability to play (pp. 103–107). This study also clearly shows how factors other than economic standing and income, such as geographical location, influence children's wellbeing.

Qualitative studies applying the capabilities approach show the wealth of applications of the capabilities approach in researching children. In one of the first qualitative studies, Biggeri et al. (2007) attempted to operationalize the capability approach by using a large survey method to ask children what their capabilities are and how relevant they are for them. The participants were children who attended the first 'Children's World Congress on Child Labour' (CWCCCL), who were frequently former child workers from various backgrounds around the world. They "were invited to identify a list of relevant capabilities for children and to express their thoughts on the most important issues related to childhood and adolescence" in the context of their degree of autonomy in the process of choice (Biggeri et al., 2007, pp. 61–62). While Biggeri et al. appreciated the children's participatory rights, they shared the concept of childhood as becoming (an adult) and a state in which "the capabilities, the choices and the living conditions crucially affect the children's position and capabilities as adults" (2007, p. 63). The study follows the previous studies by Biggeri (2003) and Di Thomaso by employing the list of central human capabilities as developed by Martha Nussbaum but the said list is transformed into 14 categories. Biggeri et al (2007) strove to achieve an objective conceptualization of children's capabilities by "separating expressed preferences from the children's own life experiences." The main question asked was "What are the most important opportunities a child should have during her/his life?" The researchers then linked those important opportunities to the list of 14 categories. The study shows that the children talked the most about the opportunities that were linked with Education (the most frequently mentioned category), Love and care, Life and physical health, and Leisure. One interesting discussion concerned children's recognition of paid work as a capability. Bigger et al. (2007) mentioned one child delegate who proposed to add paid work as an important capability for children, however the proposal was not accepted as other children participants opposed it.

An ethnographic study by Andersen and Fegter titled "Latitudes of socially disadvantaged children" concluded that social relations with family and friends are one of the most important domain in children's lives (2011). Thus, the authors underlined the importance of the presence of dependable adults in children's lives that are not restricted to parent figures (Andersen and Fegter, 2011).

Biggeri and Annich (2009) advanced the operationalization of capabilities in a study on street children in Kampala, in which they compared the preferred



capabilities between street connected children and those with the past experience of street life, and the control group of children who were never in those situations (Biggeri and Annich, 2009). The authors argue that the capability approach can help in reducing the level of deprivation of vulnerable children by showing multiple dimensions of improvement for the state and NGOs, while also contending that the conceptualization of capabilities by children allows them to discover the relevant dimensions of their wellbeing (Biggeri and Anich, 2009, p. 17).

### **Nussbaum and social justice as a context for working with street connected children**

Nussbaum writes of her approach to social justice in the following words:

The approach in my version is a partial theory of social justice; it does not purport to solve all distributional problems; it just specifies a rather ample social minimum. Delivering these ten capabilities to all citizens is a necessary condition of social justice. (2011, p. 40)

According to Martha Nussbaum's concept, good life is based on the anthropological assumption that humans are fundamentally social beings, which underlies Nussbaum's understanding of a full and dignified life that can be described as such only when it does not lack basic capabilities to function (2012, p. 539). Robyens notices that, contrary to Sen, "the distinction between agency and well-being is absent from Nussbaum's account for the capability approach while Nussbaum argues that all the important distinctions can be captured as aspects of the capability/functioning distinction" (Robyens, 2003, p. 17).

What is really important is that the concept of good life is not equal to self-reported happiness because "regardless of what people actually feel about their condition, lacking one or more of the basic capabilities is an issue of justice" (Muraca, 2012, p. 539).

### **Methodology and research description The development and testing of the "capabilities cards"**

The qualitative methodology of the project is based on the list of central human capabilities as developed by Martha Nussbaum, used as a guide to create "capabilities cards," i.e. graphic presentations of listed capabilities to facilitate discussions and data collection en route to a thick description of children's well-being and their views on their capabilities.

The list of central human capabilities was created by Nussbaum (2011) is based on the capabilities approach, referred to by Nussbaum as "an approach to comparative quality-of-life assessment and to theorizing about basic social justice" (2011, p. 18). Nussbaum lists four main characteristics of the capability approach (CA).

The first characteristic approaches each person as an end by asking the question “what is each person able to do and be?” Such an approach allows us to identify the opportunities available to individuals in at the context of average well-being. Secondly, the CA is focused on people’s freedom to choose from among the available opportunities. People are consequently respected for their ability to define themselves. Thirdly, the CA is pluralist with respect to value, since capabilities differ in quantity and quality; also, “a fundamental part of understanding and producing them i[nvolve]s understanding the specific nature of each” (Nussbaum, 2011, p. 19). Finally, the CA focuses on the “entrenched social injustice and inequality” that are visible and noticeable in capability failures as a result of discrimination or marginalization.

Nussbaum’s version of the CA is concerned with human dignity, the threshold and employs a list of Central Capabilities. Nussbaum describes capabilities as not something that just sits inside a person but as opportunities “created by a combination of personal abilities and the political, social and economic environment” (2011, p. 20), which she dubs “combined capabilities.” Those combined capabilities are different from “internal capabilities” in that they are fluid and dynamic and include “trained or developed traits and abilities, developed in interaction with the social, economic, familial and political environment.”

Nussbaum notices that internal capabilities are not innate, and she consequently creates another category, i.e. that of basic capabilities. Basic capabilities may (or may not) be nurtured in the process of human development seen as the “unfolding of powers that human beings bring into the world” (2011, p. 23).

Society’s goal should be for “all to get above a certain threshold level of combined capability, in the sense not of coerced functioning but of substantial freedom to choose and act” (2011, p. 24). The aim for those with lower basic capabilities would be to receive more help to get above the threshold.

Functioning is “an active realization of one or more capabilities” (Nussbaum, 2011, p. 25). Capability’s main distinction is that it entails the opportunity to select, to be free to choose. For example, there is a clear distinction between a person who is starving and a person who is fasting. The starving person has no choice while the fasting person has capability to stop the fast. Nussbaum wrote: “In a sense, capabilities are important because of the way in which they may lead to functionings” (2011, p. 25).

The debate over endorsing a list of capabilities or functionings is very prominent in the capabilities approach. Sen does not propose any definite list and his main argument is that the selection of functionings should be “an act of reasoning” and the capabilities approach should remain general and adaptable to specific contexts. Nussbaum, on the other hand, proposes a more specific capabilities approach, which combines a theory of social justice and a normative approach to what constitutes a good life, in which a rigidly defined list is proposed.

Nussbaum proposes a list of ten central human capabilities:

1. Life; 2. Bodily health; 3. Bodily integrity; 4. Senses, imagination and thought; 5. Emotions; 6. Practical reason; 7. Affiliation; 8. Other species; 9. Play; 10. Control over one's environment.

Nussbaum has specified this list in more detail in several of her recent publications (Nussbaum, 2000, 2002a, 2002b, 2003a cited in Robyens, 2003). It is important to note that Nussbaum does not agree with any trade-offs among capabilities, as all of them are seen as equally valuable (Comim, 2008, p. 165).

The methodology follows from Nussbaum's idea of multiple realizability by following the two step process of setting the list of central capabilities chosen by children based on the deliberation on the list of central human capabilities, and followed by further specification of the capabilities chosen by children in their context. The cards have symbolic pictures on one side and a text in Polish on the other, and represent the corresponding capabilities from the list of central human capabilities created by Nussbaum (see Appendix CHM). The graphic design had been created by the young artist Milo Banachowicz, who was conceptually aided by his parents, Polish graphic artists and painters Agnieszka and Mariusz Banachowicz, and by a student researcher. The design was meant to elicit reflections with respect to each capability, however it was also assumed that children would be free to express their own understanding of the pictures. The text added on the other side of the card aims to channel attention towards the content of the capability. The cards are designed as an experimental tool for social workers to approach service users through philosophical reflection on their various capabilities, and as a tool to build rapport and ask questions that would elicit philosophical responses.

The capabilities cards method was first and foremost intended to enable the children to express their perceptions and reminiscences about their own capabilities. The method is materialized in the form of playing cards, which attract children's attention and encourage them to reflect on pictures and the meaning of the cards in relation to their own understanding. The assumptions of the method are twofold. Firstly, it is based on the view that children are active contributors to society and active co-constructors of their social worlds as understood by Qvortrup's approach to childhood as a social phenomenon (Corsaro, 2015, pp. 30–40). Secondly, the task of philosophical reflection is offered to children who are perceived as full-fledged human beings based on the pedagogy of Korczak (1967).

The central method of data collection using the cards involved various activities for children, built-in into their usual group activities. The cards were shown to the examined children at the beginning of our meeting, with one set of cards prepared for each child. The activities are meant to be flexible and not very structured and long, as it was obvious that the children preferred physical activities and that I would have to bargain with them to get them committed to reflection and discussion. The guiding idea of all of the activities was Korczak's question:

“Who is the guide, who is the student?” which allowed the children to assume leadership, while also enabling the researcher to learn from them about the applicability of the capabilities cards.

I have approached the Group of Street Pedagogy and Animation (GPAS Praga 2015), an NGO that operates based on street pedagogy and street animation principles. The GPAS is small in size but leads the sector specializing in street working. The GPAS was created in 1990 as an innovative, first street working Polish organization with the help from a sister agency in France (Le GPAS). The personnel currently consists of one leader/manager and 8 street workers, however all of them are involved in administration and management aspects, especially the creation of new initiatives. The organization plays a leading role in Poland in building alliances, holding consultations and trainings in all aspects of work with street connected children.

For the purpose of this project, I have envisaged to manage street connected children gathering in different locations on the streets of Praga Północ (one of the most impoverished districts of Warsaw). To this end, I contacted the GPAS street workers, using them as gate keepers allowing me to build a relationship with the researched children.

I met with the GPAS management and its street workers to explain the scope of the project and the plan for data collection. We had outlined my involvement with the children from the introduction, through relationship-building exercises and research-specific data collection. The street workers approved the documents that were created for the children, namely the letter of introduction, the letter on the nature of social research, and the informed consent to be signed by the parents. We decided collectively that the street worker would approach the parents, as they had already established a good relationship with them and were able to clarify the scope and requirements of the project. The ethical consideration in relation to the interruption of group processes had been discussed with street workers, and we planned the project introduction to the group very carefully. Research relationship is the term used by Maxwell (2013, pp. 90–94), otherwise known as “gaining access” (Bogdan and Biklen, 2003 cited in Maxwell, 2013, p. 90) or “negotiating entry” (Marshall and Rossman, 1998 cited in Maxwell, 2013, p. 90), is critically important to the overall research project. The term research relationship focuses the researcher’s attention on the effort that must be put into the “relationship” that is not static and granted from the beginning of the project. “The researcher is the instrument of the research and the research relationships are the means by which the research gets done,” argues Maxwell (2013, p. 91), emphasizing that the relationships between the researcher and the participants are reciprocal, and both sides are affected by the process.

### **Street workers' reports as additional data for research**

Additional data on the research context was obtained from the annual reports prepared by the GPAS Praga street workers. Seven standardized reports were rendered available by the management of the agency. All identification data, such as names, school names and addresses, was removed from the reports. The reports were used to paint the picture of socio-demographic characteristics of children who are service users of street working groups. This data is partially used in the theoretical section, which sets up the background for street children in Poland.

The summary of street workers' reports serves as a background for a specific context for the children who participated in this project. The children are included in the statistics and descriptions. A total of 7 reports prepared by the GPAS Praga street workers were included in the analysis that outlines the demographics and dynamics of 7 street working groups actively involving 40 children.

The age of the children varied between 9 and 15, with a total of 12 girls in the group. Boys and girls were mixed in 5 street working groups. The children usually cleared more than one category, therefore it was assumed that each belonged to at least one category of family diagnosis. 30 out of 40 children were under the care of statutory social assistance agencies, while 14 out of 40 had parents who were supervised by a family court officer. The generalized problems in the families included addiction, poverty, unemployment, domestic violence, long term disease and single parenting. In most cases, the children's functioning was disrupted due to the said problems.

The initial plan for the workshops was not strictly observed, and for the benefit of the participants card games were added to the usual activities and played whenever the children agreed to take part in them. It was very important that the children's activities were not disrupted too much by the process of data collection, as it could have a negative ethical impact on the group dynamic, which was very important for those vulnerable children. The children had to be enabled to participate in their usual activities, mainly physical activities such as chasing, playing with the ball, hide and seek, and similar games. The most appropriate time for introducing the cards and encouraging the children to hear about them was during the meals that were an integral part of the gatherings, and a form of gratification for the children. During meal times, the children were able to focus on the cards and think about them.

### **Expert interviews using the domains of the capabilities cards**

The interviewing of experts (street workers) was projected as non-standardized, focused interviews in order to ensure greater sensibility and a relaxed atmosphere (Gilbert, 2001, p. 124). Gilbert describes non-standardized interviews as a flexible

tool to “elicit rich, detailed materials” (Lofland in Gilbert, 2001, p. 125). This is even more important when the topic is sensitive and complex (Lofland in Gilbert, 2001, p. 126), as is undoubtedly the case with street connected children and the work experience of street workers. Interviewing experts is critical for providing a thick description of children’s lives through the lens of their capabilities. The interviews were planned to begin with mapping questions formed as open ended questions to elicit specific dimensions of the children’s current life, especially the part of their life that is connected to the street and the services available to them: what transpires while they spend time on the street, how often the children search for social services, how they can find social services, where they spend their time. The interviews were recorded and listened to in order to identify common themes, and then these main themes were translated into English. I have interviewed two GPAS street workers as the main experts, since those two street workers had been involved with the street connected children for long time. Additionally, I interviewed 3 additional experts, two of whom held managerial positions to provide the researcher with the background on, and understanding of, the children’s problems.

### **Rapid ethnographic inquiry**

The method of rapid ethnographic inquiry was chosen to support the two central methods chosen for this project (children speaking about their capabilities and experts reflecting on children’s capabilities). I spent approximately two months attending two street-working groups and observing the children and their interactions inside the group and with the outside world. I had been trying to observe them without the lens of the capabilities approach, applying this lens after writing down the observations on the main themes that were made manifest during this short period.

### **Research results Play with children**

I have identified three main themes arising from the car play with the children:

1. The children’s capabilities do not exist in a vacuum and the children talk and think about their capabilities as dependent and interconnected with the capabilities of the adults around them. The children are acutely aware that their capabilities are related to the capabilities of their parents, friends and street workers.
2. The children’s capabilities are not “set in stone”—the children notice that their capabilities are changing and that they are able to influence them and gain more capabilities to better their lives. The children are instinctively philosophical about their lives and eagerly ask questions about the purpose and meaning of their lives.

3. The children are very aware that there are multiple expectations for them to function well in the family, society, on the street etc. However, the children sense and express the lack of sufficient opportunities to gain and/or develop their capabilities beforehand. The children have difficulties to function in society because the process of gaining capabilities was interrupted due to family difficulties, poverty and social disadvantage (e.g. lack of access to resources, special education, etc.).

The children's understanding of **the life card**, and their insight about life as human development was striking. The children immediately grasped the concept of living life from childhood to old age, noticing how the capability to live a life of expected length is linked to other capabilities, such as health, emotions, and employment opportunities. The children captured the issues that people encounter in their communities, which directly impact their well-being as well as their families' well-being. They linked life with the absence of serious diseases and with the ability to build a long-term relationship. The children guessed that the opportunity to live a long life depends on resources and one's ability to make choices.

The children immediately noticed that the capability to enjoy a long, good life is linked to other capabilities, especially to the capabilities of other people, and they saw it as a causal relationship, while also noticing the interrelation between having a job, finding love, and improving one's quality of life.

The children were very interested in **the emotion card**, which represented a simple picture of a baby with a red heart that was widely interpreted as love. The children were choosing this card to play with most often. The capability of developing emotional attachments to others was very important to the children: they mentioned parents, girlfriends, boyfriends, and their peers, along with the reciprocity of emotions and their own ability to requite them. The emotions were perceived as strong forces in their lives that impacted their well-being. The children saw how the capability to grow attached to others and develop emotionally develops in relation to the people around them.

**The control card** was frequently chosen by the children, who always discussed it in relation to interdependent capabilities. For this specific context of street connected children, two aspects were tailored to this capability. The first one was the discussion on children's participation in child governing organizations and the decisions regarding children's environment. The second one concerned the simplified ability to possess private belongings and pocket money, and to take up minor jobs. The children were articulate about the meaning of jobs in their lives, speaking about the difficulties faced by the job-seekers in their families. The children were not sure whether they had any say in decision-making, and doubted that anyone would ask them about it. Within their immediate group, the children were always involved

in decisions concerning the activities of their group, which could provide them with a platform to develop skills in decision making.

### Expert interviews

The conducted expert interviews provided a rich and detailed account of the children's capabilities and functioning.

The experts' views show that the children's capability of living a long life is impacted by the overall condition of their immediate community, i.e. the district of Praga. In the course of discussions, the children often mentioned the many instances of suicide that they heard of or even witnessed. There is no statistical data available on suicides in Poland, however the interviewed experts admitted that suicide is very common in the suburb of Praga.

The experts identified deprivations of capabilities even in the very basic domains of nutrition and shelter. Children's lives are affected even before they were born—by their parents' behavior and nutritional habits. If they drink and smoke, children may be born with serious birth defects, and those factors need to be taken into consideration when assessing children's deprivation. This is even further complicated by the fact that children themselves may not be aware of deprivations, adjusting to life as it stands. Secondly, children may be deprived because of trade-offs between respective capabilities, such as situations in which parents have to choose the "lesser evil." Nussbaum calls those "tragic choices," as exemplified by parents keeping children at home instead of sending them to school if a given family relies on the children's labour (Nussbaum, 2011, pp. 36–37). Daily choices made within families and communities may also be tragic. Yet, families are often blamed for being poor and making "wrong choices."

The interviewed experts admitted that their cares are often excluded from participation in children governing structures at school, mainly because of their behavioral problems, and that they are often used as porters "to carry chairs and desks," even though they could contribute a lot. The experts noticed that children are able to manage their own belongings and money, take care of their belongings, especially mobile phones; however, when they get their pocket money they can spend it in a very short time and have difficulties budgeting.

The societal norms were ever-present in this domain, with the experts noticing that many community members in Praga suffer from long-term unemployment or remain under social assistance supervision, which is often seen as a sign of resourcefulness.

The discussions and views about how capabilities depend on other people's capabilities as well as many conversion factors are congruent with the findings of Foster and Handy (2008, p. 4) on the external capabilities that arise when a person is able to improve their functioning based on the capabilities of another person.



In the discussions above, I demonstrated that a person may decrease their functioning standard if external capabilities do not facilitate their positive functioning.

### **Ethnographic analysis**

I came in as a total outsider, a person who had not been living in this country for many years, nor had ever lived in Warsaw. Even though I am a Polish native speaker, people in Warsaw notice my southern ‘Silesian/German’ accent. I liked the idea of approaching things from afar, and decided not to conduct expert interviews before meeting the children. Thus, I was completely ignorant of the specificity of those children’s lives.

I noticed brief instructions were directed towards me, which were meant as way of easing my entry and introduction to the groups. “Do not call them street children, they don’t like it,” and “Remember to organize outings to keep the children happy.” I doubt I would call them street children. It is extremely rare to address a group by a label, in this case an institutional and research category. But they are aware of the label, it was said out loud in their presence many times, admitted one of my experts. Adults hardly ever try to slip into children’s shoes, and they tend to think that they have good intentions when they ‘help street children,’ despite calling them ‘street children’ in their presence at the same time. One more decision was made before the beginning, I was to introduce myself as an Australian and talk to children about Australia—this was meant a catch for them to think about me as someone interesting and worth attention. All of those subtle ingredients demonstrate how adults try to organize life, how it may be too risky to act spontaneously, and how different adult behavior is from that of children.

The analyzed group was comprised of five boys and a street worker. They had been meeting together for several months and they knew each other well. They ran towards us from a distance, a bit of apprehension and few words of introduction. We shook hands, they laughed a bit at my name, addressed me as ‘Madam,’ which I quickly corrected, asking them to call me by my first name. I tried to remember their names, but it was very difficult. I photographed them mentally, noticing that sympathy is an unconscious and sneaky phenomenon. Some of the boys earned my sympathy immediately because of their familiarity and ability to juggle conversations.

Some boys were distant and did not bother to engage with the researcher, going about their business or acting out and spitting around. We got noticed everywhere we went. The boys were very energetic, jumping, running, kicking, spitting, yelling, swearing—all of them doing something different at the same time, constantly dividing my attention. And yet, somehow in this carnival chaos one of them would always accompany me and the street worker to chat us up. They sometimes did so to catch a breath, or to ask unexpectedly personal questions. The boys were aware of their behavior, and felt free and unconcerned about discipline and

‘good behavior.’ I felt like saying “Stop it!” or “Behave yourselves!” many times, but I never did. The rules were dictated by the group, and they only stopped when threatened by an authority figure with obvious power, such as security or police officers, mostly whenever they became aware that their behavior was unacceptable (which was followed by a warning or an injury sustained in the course of their play). Traditionally, it is the adult’s role to set the rules and, more importantly, to enforce them, but in this case the boys have more power and offer me something very precious: their trust. Their testing of adults (the street workers, me, the passers-by, random shop owners, fellow travellers on buses, trams, and the underground) was never ending. In many instances, it caused other adults to become angry and irritated with the children. Some commented on the situation, “Are their parents with them?,” “Can you control them, can you stop them?,” “Stop doing this! This is blatant misbehavior!”

The group had rules. When they were swearing the worker changed the swearing word into a less intrusive one. They had a simple warning system with three warnings resulting in banning the participant from attending the next group meeting. The boys were often checking with the street worker their current ‘level of warnings,’ they were very proud when they had none and demanded a prize for that. But they sometimes had more important aims than that. They tried to actually get a warning when their friend got one or when everyone was getting warnings: the aim was to have the same number of warnings across the group.

The boys tried to behave as if they were each other’s mirror image. Play encouraged more play, fighting encouraged more fighting. When seen through the lens of the capabilities language, it was very obvious that the children in those settings were able to enjoy many capabilities and they were choosing freely to transform them into functionings. The capabilities were that of being free to move around and behave in a way that is accepted by your peer but not always by the outside world. The boys had chosen to achieve functionings in the areas required to be perceived as powerful and in charge of the situation by their peers. They laughed and commented ironically on the functionings that are seen as ‘desirable’ (behaving well, not talking back or not fighting). Those capabilities were specifically visible in the context of street connectedness and they were often the capabilities that would not be recognised as producing commonly desirable functionings. The children were rough and behaved in a way one had to get used to, as they were different from the cultural norms of a white middle class background.

### **Discussion and recommendations**

The capabilities cards created for children may be classified as a methodology belonging to “the grassroots exploration of human capabilities” (Ibrahim, 2015, p. 12). The qualitative data collected by recording the children’s views and perceptions

about capabilities captured the multidimensional nature of human capabilities, while at the same time demonstrating the methodological challenges in exploring capabilities as opposed to functionings.

The analyzed data indicated that the participants, both the children and the street workers, focused more on achieved or potentially not achieved functionings in the children's lives. The evaluative space of this specific context for street connected children from Praga was constantly shifting from capabilities to functionings, confirming that the main challenge in the operationalization of the capabilities approach lies between choosing the evaluative space of capabilities or functionings (Ibrahim, 2015, p. 15). The difficulties in the discussions with street workers were recognised with regard to describing and assessing capabilities, which cannot be directly observed, rather than functionings, which are more obvious. Coming (in Ibrahim, 2015, p. 16) argued that the distinction between capabilities and functionings is often blurred; in Ibrahim's view, the main challenge is to capture or guess all possible choices available to the people involved in the evaluation (2015, p. 16). Conversely, Robyens argues that it may be useful to focus on both capabilities and functionings to better understand whether people are able to use their freedoms and whether they have these freedoms in the first place (Robyens, 2003).

It was not the intention of this study to measure the capabilities of children, nor to measure the level of deprivation in particular capabilities. The objective was to explore children's understanding of their capabilities and how children's capabilities are understood by street workers and other experts. Based on the data obtained during interviews, it became obvious that the lives of the analyzed children were often described in terms of a lack of choices or—in the research terms—a lack of capacities. This could also be seen as the expert's/researcher's bias in evaluating and apprehending children's circumstances through our perceptions of a good life.

The work with capabilities cards was not meant to produce charts of capabilities failures but to initiate dialog about human condition (human existence) while also stressing that children are fully enmeshed in it on existential level. The capabilities cards stimulated discussions with the experts about the difficulties in questioning children about their choices and the meanings that underpin their actions. In sum, every time the capabilities cards were 'played,' the children and the professionals involved were forced to engage with each other on a truly human level. The discussions through the lens of capabilities were meant to avoid both the institutional trap of perceiving children as victims of their circumstances and the critical/activist assumption that children are strong and resist self-destruction (Gigengack, 2008, p. 15), while also concurring with the ethnographic mission of seeing the children exercise their self-destructive agency by engaging in dangerous behaviors.

The dialog using the cards as representations of the domain of human capabilities was very demanding on the participants (both the children and the experts). The process was marked by both difficulties in adjusting the understanding of

what capabilities represent and how to talk about them, and opportunities in the sense of future choices. The cards were too abstract for the children. The testing and using of the capabilities cards in such short-term field work clearly showed that the method is more appropriate for long-term social work with service users.

The card use requires the social worker to fully engage with service users. They are not a quick fix tool to collect data. The cards are suited for long-term work with service users as what they represent is not static in the course of human development, capabilities evolve and new capabilities may emerge along with new functionings or, quite the opposite, the choices available may be more and more constrained.

The study suffered from the lack of time and over-ambitious data collection from different sources, which resulted in insufficient time for data analysis. The study clearly indicated that there is a need to translate the discussion with service users about their capabilities and functionings into practical steps of improving their lives, and to identify what conditions are needed through which capabilities can be developed (Uyan-Semerci, 2007, p. 203).

The future research in relation to children's capabilities could benefit from an action process whereby the cards would be created with children and guided by their curiosity about life and well-being. It would also be important that the street worker would receive feedback on children's engagement in card play and the projected long-term benefits of using them in street pedagogy.

## Conclusions

If one tries to apply the capabilities cards in social work practice settings, the consequences may be twofold. Firstly, by discussing with service users their capabilities and functionings as well as conversion factors at the individual, societal, and systemic level, it will help to build a holistic view of the encountered difficulties and problems.

Secondly, the social work practitioner may engage with service users on a more political level according to the quote by Uyan-Semerci that "the practical goal is to provide the necessary conditions through which capabilities can be developed" (2007, p. 203).

The cards that were inspired by the list of central human capabilities compiled by Nussbaum (2001) were also the result of much broader fascinations with the capability approach and its possible applications across many disciplines, including social work. Especially with the capabilities approach, this provides one with the ability "to enlarge informational space in normative assessments and to pass the ball to public discussion and democratic deliberation to decide questions of quality of life and justice" (Comim, 2008, p. 163).

The cards could be used in the international context for the purposes of facilitating dialog, however for each specific context the cards and the capabilities would be

specified by the participants. The critique of the normative content of the capability approach as presented by Nussbaum is often related to the normative stance it takes on the concept of good life. To address this critique, the cards could be contextualized and negotiated in the course of community discussions—an activity that would be beneficial for service users and social workers alike by creating a relationship of trust with both groups respecting each other's opinions and views.

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## Streszczenie

### Praca z dziećmi ulicy narzędziem *capability cards*

W pracy przedstawiono wyniki partycypacyjnych badań eksploracyjnych prowadzonych z dziećmi ulicy w Warszawie. Karty zdolności zostały stworzone przez badacza wykorzystującego listę centralnych ludzkich zdolności stworzonych przez Martę Nussbaum i są unikalną operacjonalizacją podejścia w pracy społecznej z wrażliwymi populacjami.

Stosując metody jakościowe, celem tego badania jest wysłuchanie głosów dzieci ulicy związanych z ich możliwościami i dobrostanem oraz sprawdzenie, czy użycie języka umiejętności (capabilities) pomoże dzieciom lepiej zrozumieć ich samopoczucie i aspiracje życiowe.

**Słowa kluczowe:** dzieci ulicy, dobrostan, możliwości, praktyka pracy socjalnej, badania partycypacyjne

## Examining Social Support Service from the Perspective of Adolescent Mothers

### Abstract

Adolescent motherhood is a global issue which attracts much controversy and misreadings. Based on a case study in Poland, this research revealed the strong influence of socio-cultural context upon social service provision. From the interviews with adolescent mothers and helping professionals, the lack of social support, along with the legal barriers and discrimination from helping professionals and society, are identified as some main issues to be improved. Drawing on the feminist approach, this research calls for a critical review of the dominant discourse on adolescent motherhood. It also suggests that open discussions and actions are needed in addressing adolescent mothers' needs. The possibility of establishing user-led organizations is also discussed.

**Keywords:** social work, adolescent mothers, social support, feminist approach

### Introduction

Adolescent motherhood may not be one of the traditional focuses of social work. Unlike poverty or mental health issues, the term of adolescent motherhood did not appear in public until the last 50 years (Dillion and Cherry, 2014). Since its emergence, the concept has been presented as one of the most serious health and social problems, along with the discussions of morality, societal change, culture, sexuality and many other sensitive concepts (Furstenberg, 2007).

Depending on the context, there are many different circumstances and aspects of the notion of adolescent motherhood. In developing countries and least developed countries, such as Niger and Bangladesh, adolescent motherhood is usually the consequence of child marriage, which results from poverty, cultural and social norms (UNICEF, 2015). In developed countries, such as the United States and the United Kingdom, early marriage is no longer the case (UNICEF, 2001). Frequently,

adolescent pregnancy and adolescent motherhood are “presented as the outcome of a poor upbringing, promiscuity or a cynical attempt to access social assistance (and sometimes all three)” (Ellis-Sloan, 2014b, p. 130). While whether to become a mother is considered as women’s personal choice, having babies at an early age is seen as one of young girls’ “rationality mistakes” (Duncan, 2007, p. 325). Meanwhile, it is also considered as a burden for society. Adolescent mothers are seen as “social assistance-dependents” who rely on the state benefits (Ellis-Sloan, 2012). Also, it is believed that they are not capable to raise children by themselves, which requires society to spend more on assisting their babysitting (Davies et al., 1999).

However, these concerns did not inevitably lead to more care and support. It was pointed out that current interventions often solely focused on preventing adolescent pregnancy and failed to tackle the various issues which are in correlation with adolescent motherhood, such as poverty, tradition, culture, religion, and so forth (Dillion and Cherry, 2014). As adolescent motherhood is seen as unwelcome, restrictions on the support for young mothers are sometimes used as a method of prevention (Murray, 1984). The judgment experienced by young parents in various social service settings has hindered them from finding professional support (Graham and McDermott, 2005).

Located in the social assistance system, social work is considered as responsible and capable of a leadership role in addressing the issues around adolescent parenthood (Aparicio et al., 2014). However, there is a lack of research in the field of social work with respect to the situation of teenage mothers and their opinions on social support. This study seeks to examine current social support services from the perspective of adolescent mothers. Acknowledging the influence of socio-cultural contexts, I chose Poland to conduct a case study. The feminist approach was adopted to collect and analyze adolescent mothers’ narratives about their experiences of the available services and their opinions for future improvement. To deepen the discussion, helping professionals from organizations that work with adolescent mothers were also interviewed to provide a fresh view and initiate a discussion on the provision of social services for adolescent mothers.

### **Theoretical background**

For a long time, adolescent pregnancy and adolescent motherhood were not seen as a problem but as normal and even desirable (UNICEF, 2001). The term of adolescent motherhood and adolescent pregnancy firstly appeared to public in the late 1960s and early 1970s, despite the fact that adolescent pregnancy rate already passed its peak (Vinovskis, 1988). Since its emergence, the term has been viewed as closely related to various risks and negative outlooks. For example, research shows that pregnancy and childbirth can bring detrimental health consequences to adolescent girls and their babies, including low birth weight, preterm delivery, severe neonatal

conditions, and high infant mortality and morbidity (Ganchimeg et al., 2014). Also, becoming a mother usually hinders an adolescent girl from continuing her education, and hence limits her choices in the future and increases the possibility for her children to repeat her life path (UNICEF, 2001).

These notions of risks and negative images of adolescent mothers were shaped and spread through policy making and mass media, which further enhanced the stigmatization of this group (Furstenberg, 2007). In the countries where adolescent pregnancy rate is relatively high, for instance the United Kingdom and the United States, adolescent motherhood is often considered as a significant social problem which requires specific policies to tackle (Department for Children, Schools and Families, 2007; Guttmacher Institute, 2016). However, under the risk paradigm, social policies often focus on the depiction of teenage pregnancy and motherhood as a problem instead of promoting the wellbeing of young mothers (Arai, 2009). For example, with extra attention on teenage girls from socially deprived backgrounds, the risk management approach often has a eugenic outlook by identifying problematic populations and conducting interventions in the aim of reducing fertility rate (Macvarish, 2010). Besides, resuming education and employment is often considered as the most effective means in this respect, and adolescent mothers' behavior change is viewed as the key to encourage young people to display rationality and responsibility (Duncan, 2007).

Meanwhile, many scholars attempt to view the issue through other theoretical lens. From the human rights perspective, it is claimed that "a girl who becomes pregnant—regardless of the circumstances or reasons—is one whose rights are undermined" (UNFPA, 2013, p. iii). It is argued that the lack of comprehensive sex education and restricted access to sexual and reproductive health services have extremely limited adolescents' choices in sexual and reproductive health issues (Chandra-Mouli et al., 2015). By viewing adolescent pregnancy as a result of right violation, programs regarding ASRHR have set reducing adolescent pregnancy as one of the main goals (Chandra-Mouli et al., 2015). Nonetheless, adolescents' right to decide whether and when to have a child is rarely discussed (Save the Children, 2014).

Previous research has investigated how the socio-economic background affects one's sexual and reproductive decisions. It is reported that adolescent girls from socially disadvantaged groups are more likely to become pregnant and less likely to choose abortion than those from more advantaged group (Lee et al., 2004), which reflects a lack of education and employment opportunities for youths from certain classes (Hoggart, 2003). Moreover, although becoming a mother can bring hope to many teenagers, those from the most disadvantaged group found it difficult to truly escape their pre-pregnancy conditions (SmithBattle, 1995, 2000). With a focus on the macro level, it is suggested that reducing the range of adolescent parenthood is not possible without tackling social inequalities (Arai, 2009). Since adolescent

mothers from different socioeconomic groups are affected in various degrees, the most disadvantaged groups should be provided with “not just average but above-average psychological resources and strengths, self-concepts and competences” (Musick, 1993, p. 3).

From the feminist perspective, several power issues regarding adolescent motherhood can be identified. Firstly, the dominant discourses of gender roles have placed teenage girls to a submissive position in a relationship in such they often feel hesitate to negotiate sexual issues with partners (Svanemyr et al., 2015). Secondly, social norms of sexual morality often create a culture which is silent in responding to teenage girls’ demands of information, knowledge and service in relation to gender and sexuality (Svanemyr et al., 2015). Thirdly, the unequal power is also shown in the way of poverty, unemployment and violence, which constricts the available choices for adolescent mothers (Kelly, 1999).

Taking a critical position, many researchers conducted qualitative research in order to understand the real life experience of young mothers, which to a great extent challenged the mainstream reading of adolescent motherhood as a route to social exclusion. Firstly, research findings indicate that adolescent pregnancy may be “unplanned,” but not always “unwanted” (Duncan, 2007). In fact, some groups of young women and men expressed their desire for pregnancy and many others do not plan it, but also do not use contraception due to their positive attitude towards a baby (Cater and Coleman, 2006). Hence, it is argued that a widespread idea of adolescent pregnancy as a “rationality mistake” need to be revised (Duncan, 2007).

Secondly, many respondents reported positive effects of motherhood. Seeing motherhood as “a path to maturity,” a lot of adolescent mothers admit that having a child has made them feel competent and independent (Davies, et al., 1999). While receiving support from families and extended community, they also report a stronger connection with family and society (Arai, 2009; Moloney et al., 2011). Moreover, being a mother helps young women to build resilience against constraints and stigma, as Shea et al. stated that “women draw on pride, autonomy, and resilience to defend themselves against the dominant public discourse of ‘shame’ that surrounds ‘teen mum’” (2016, p. 852).

In addition, becoming a mother also can be a turning point for adolescent mothers. In the aforementioned research, adolescent mothers reported getting off drugs, standing off from risky friendships, as well as re-evaluating their earlier behaviour and experience (Duncan, 2007). Contrary to the common reading of adolescent mothers as dropouts and unemployed, many claim that having a baby gave them the impetus to change direction, for instance resume their education and employment (Phoenix, 1991; Seamark and Lings, 2004). Therefore, some scholars posit that adolescent motherhood can be an act of social inclusion and “may be more of an opportunity than a catastrophe” (Duncan, 2007, p. 308). With regard to assistance,

feminist researchers emphasize that adolescent mothers should receive respect and support without judgment and surveillance (Kelly, 1999).

Regarding the intervention and research of adolescent motherhood, the stance of social work service is not always clear. Research has found that social workers' autonomy is greatly affected by the social assistance regime, demands from the state, limited resources, and increasing management (Welbourne, 2011). While it is claimed that "[n]o outcome is more important to the ... (program and) benefactors than the prevention of repeat teenage pregnancies" (Hudgins et al., 2014, p. 105), whether the service is to provide support or influence adolescent mothers' productive choices needs to be critically reflected. One scholar has suggested that in relation to adolescent pregnancy and motherhood, social work can integrate a critical gender perspective (Kulkarni, 2007). To do so, it should start from shifting young mothers' role as passive recipients to that of active agents by giving them space and valuing their voices and solutions (Brand, et al., 2014).

### Methodology

This research adopts the feminist approach to guide its design. It is not only because adolescent mothers are women but also because the feminist approach values women's experience and views it as the source of true knowledge, from which new ways of understanding emerge (Weedon, 1997). In fact, the feminist approach seeks to uncover the issues which were hidden or kept private, to speak out against and name the oppression against women (Ellis-Sloan, 2012). It is claimed that "making a challenge and attempting to effect change is a key element of feminism" (Ellis-Sloan, 2012, p. 81), and producing useful knowledge to make a change in women's lives should be the starting point of feminist researchers (Letherby, 2003). This idea clearly reflected the motivation behind this study, which not only strives to describe the experience of adolescent mothers in receiving social services but also aims to initiate a discussion on how the social services could be developed in order to provide better support for them.

To do so, qualitative research methods were adopted that allow researchers to "share in the understanding and perceptions of others and to explore how people structure and give meaning to their daily lives" (Berg, 2001, p. 7), which echoes the principles of the feminist approach. In this article, Poland was chosen as the location for a case study. The socio-cultural context of the country makes it an ideal location to understand how the issue of teenage motherhood is shaped by society. In Poland, conservative religious values and liberal western culture exist in parallel (Kopacz and Bajka-Kopacz, 2012). As the Catholic Church still wields significant power in influencing the government and its policy making in relation to issues of sexuality (Heinen and Portet, 2010), adolescent girls face difficulties in sexual and reproductive health issues due to the lack of sexual education classes, limited

access to contraceptive methods, and restrictive abortion policies. Moreover, the question of adolescent pregnancies simply does not appear in public discussions and the public support for teenage parents remains underdeveloped (Portet, 2006). Research shows that the family of origin still acts as the center of the parenting support network and assists young mothers with childcare, financial and emotional support (Królikowska, 2011).

For the purpose of data collection, Polish laws, policies, and literatures in related fields were firstly reviewed. Due to the time limit and language barrier, I was unable to access a significant part of Polish literature on adolescent motherhood and the attendant supportive services. However, by joining various events, such as a demonstration against the abortion ban and the Congress of Women, I was able to understand more about the socio-cultural and political context regarding sexual and reproductive issues in Poland.

In this research, semi-standardized interviews were planned with both adolescent mothers and social workers. Acknowledging the difficulties of conducting research in a foreign country within a limited time frame, I chose availability sampling, which relies on those who are easily accessible (Berg, 2001), to determinate the respondents for data collection. In the end, I conducted one interview with an adolescent mother who was staying with her family of origin, and two more interviews with adolescent mothers who were receiving supportive service from one organization (see Table 1). Acknowledging the research ethics of confidentiality, the names of my respondents were changed in line with their preference.

**Table 1:** Information of adolescent mothers interviewed

Name	Martyna	Paula	Carolina
Age	19	19	18
Age of giving birth	19	18	17

Additionally, I received three email responses from adolescent mothers based on the question list drafted for the interview (see Table 2). Although the answers are mainly in line with the narratives of the adolescent mothers I interviewed, there is a lack of clarification due to the limited space in the answer boxes. Hence, I was unable to discuss the answers with the email respondents. However, these email answers were used as supplementary data for the research.

**Table 2:** Information of adolescent mothers with email responses

Name	Kludia	Kasia	Justyna
Age	16	31	19
Age of giving birth	15	17	18

As for helping professionals, three respondents were interviewed. At the time of the interviews, they were working or had worked with adolescent mothers (see Table 3).

**Table 3:** Information on the interviewed helping professionals

	<b>Staff A</b>	<b>Staff B</b>	<b>Staff C</b>
Organization and main tasks	Organization “D”- Projects for parents of very young children	Organization “O”- Institution of care and education for children aged 3-18 years who are deprived of parental care.	Organization “P”- Projects for adolescents and young people from correctional facilities
Types of organization	NGO	Governmental institution	NGO

Each interview consists of approximately 40 minutes of conversation. Because of my language barrier, different interpreters were involved in the interviews. All respondents were informed about the topic and the voluntary basis of participation. A brief research plan was also provided prior to the interviews.

After the interviews, all the conversations were transcribed based on the audio recordings. After sorting the data and codes, the ideas of both adolescent mothers and helping professionals were organized and presented according to the main themes of research. By giving voice to both sides, I attempted to create a dialogue for the sake of this research, while also facilitating further discussion on the research topic.

## **Research results**

Following the research question, various aspects of the social service system were discussed during the interviews. While the interviewed adolescent mothers were asked about the difficulties and the support they encountered, the helping professionals received questions in relation to the service of their organizations. Meanwhile, some main barriers and possible solutions were discussed with both sides.

### **Being a young mother brings challenges**

When asked about the experience of being a mother, most of the adolescent mothers held a positive view on having a baby earlier, yet used the words ‘difficult’ or ‘hard’ to describe the situation. Emotional, financial, educational and legal challenges were mentioned most frequently. Firstly, all the adolescent mothers perceived different levels and types of discrimination in daily life. Martyna shared her friend’s story,



stating, “I’ve got a friend who is 15, you can see she’s young and she’s pregnant, people look at her really badly.” The negative impression of teenage mothers can also be found from the interview with the helping professionals. Staff C shared her opinion that “there is difference between teenage mother and mature mother ... if you are a teenager, you are still a child and you are not ready to have children.”

Secondly, all the teenage mothers had to rely on the financial support from their family, and sometimes from the baby’s father, too. As financial condition has a significant impact on the life quality, Justyna said, “I was afraid that I will have nothing for the child and I will not be a good mother (without work and money).” Meanwhile, society had different expectations towards adolescent mothers and older mothers as the former are expected to resume education or employment as early as possible (Ellis-Sloan, 2014b). In the case of Poland, every working woman is entitled to 26 weeks of fully paid maternal leave, of which 14 weeks are mandatory (Michoń and Kotowska, 2013). However, of the two adolescent mothers who mentioned their school leaves, Kasia went back to school when the baby was six weeks old, while Martyna re-joined classes within seven weeks after giving birth.

In addition, it should be noted that based on the Polish law, an adolescent girl who is under 18 cannot be the legal guardian of her child except when she is married (Ministry of Family, Work and Social Policy, 2006). All the interviewed adolescent mothers were affected by the law on different levels. For those who stayed with their families, the grandparents were the legal guardians of the baby. For example, Staff A noticed that “there are conflicts in the family because the mother would like something and the grandmother decides otherwise and it is the grandmother who officially take[s] the final decision.” For those who stayed in the institutions, the underage mothers were under guardianship of their respective institutions or the court. They were not allowed to take the baby out of the institution without company, even just for a walk.

The findings revealed some main challenges of adolescent mothers. To overcome all the difficulties, they had to draw on various sources of help to support themselves.

### **Informal and formal support of adolescent mothers**

Family support was reported to be particularly important for adolescent mothers (Bunting and McAuley, 2004). Most adolescent mothers interviewed in this study were staying with their families of origin. Staff B explained that “(in Poland) the responsibility for helping teenage mothers is mostly confined to their families. It is the parents’ problem to take care of a teenage mother.” On the one hand, it guaranteed initial support to adolescent mothers. Among the interviewed adolescent mothers who were staying with their own families, no one admitted ever using any

types of social service or benefitting from any NGO programs. Conversely, in the families with poorer financial situation, the available resources for the adolescent mother and her baby were very limited.

Another type of informal support, websites and social media, was identified as an important resource for adolescent mothers. Basically, the adolescent mothers used the internet to obtain information regarding welfare policies and baby care. Besides, the Internet also served as a way of receiving professional help. For example, Paula admitted that she did not like the psychologist from the public institution and found one “off the street,” who worked with her online. Meanwhile, most interviewed adolescent mothers identified Facebook groups as particularly important. Facebook groups served as a virtual community and a safe space addressed exclusively to adolescent mothers. Staff B remembered that one adolescent mother she worked with refused to share the name of the group and claimed that “it’s our group and I don’t want you to know it.” It was important for helping professionals to understand that the internet had already become the main source of information for adolescent mothers. Hence, the delivery of information and services should also be adaptive to this trend.

Besides, through the interviews with the helping professionals who were working with different target groups, it was possible to glance over the system of support in Poland. Basically, adolescent mothers were entitled to government benefits and services in the same way as older mothers. In terms of financial support, all the interviewed adolescent mothers received *becikowe* [baby bonus] of approximately 1,000 PLN [around 250 EUR] when the babies were born. Additionally, home visits from health professionals and family assistance from social services were also provided for all the new mothers and families. However, there was no public institution or NGO working exclusively with adolescent mothers. The social services were designed primarily for those who were ‘at risk.’ Therefore, if an adolescent mother does not have severe problems, she might not be considered as the priority of the organization and be left in a helpless situation. This can also create barriers for service users when the target groups of the organization were not clearly indicated on the website, as Staff C acknowledged that “it’s also difficult because when you call one place and they say ‘no, we don’t deal with this problem,’ you may be able to make some more phone calls, maybe two, maybe three, and then you’ll say ‘oh, no. there’s nobody there,’ but it’s probably not true.”

### **Barriers and space for further social support development**

As previously noted, most of the adolescent mothers did not partake of any social service and it was their parents who dealt with the legal procedures before they came of age. However, with the two adolescent mothers who had stayed in different institutions and experienced both public services and NGO programs, it was

possible to collect their voices and further examine the system of support. In addition, helping professionals also expressed their opinions on the subject.

Regarding the structural issue, it was reported that the law regarding legal guardians restricted adolescent mothers' rights to be mothers. For example, Paula had to be separated from her child after entering correctional facilities. She was only allowed to see the baby once a week for 1.5 hours. She expressed her feelings, "the worst thing is I can't see my baby and the visiting time is not enough. The [foster] family is cool and we get on well, but I would like to have the baby at my place instead of visiting him."

Helping professionals also struggled with legal frameworks. For example, in public institutions like Organization O, the staff's autonomy was greatly limited by the law, as all the important decisions regarding adolescent mothers had to be made by the Social Assistance Centre (*Ośrodek Pomocy Społecznej*, OPS) or the family court (*sąd rodzinny*). Under this procedure, it might take between a few weeks and two months before the young mothers get the permission to pay a visit to her family. Staff B expressed her hope that if the adolescent mothers could benefit from meeting with her family, the procedure should be simplified by giving more voices to the frontline workers: "I'm sure that the director and workers know better who is closer to the girl. It doesn't matter if that's her boyfriend, sister, best friend, or teacher, sometimes from the school, the director should decide and that's it."

Meanwhile, the system of support services was also criticized. From the perspective of helping professionals, the system was seen as designed with good intentions, "well organized" (Staff C), yet burdened with many drawbacks. One of them is the lack of consideration for the needs of adolescent mothers. For instance, speaking of the Single Mothers' Home, Staff C commented that "those centers are dedicated to adult women rather than teenagers. In such a center, she can't go to school, because she has to take care of the child 24 hours per day. So it is very difficult for her to prepare for future life, being adult, working, et cetera."

As for adolescent mothers, especially those who had encountered social workers in their childhood, they had a negative impression of, and a sense of resistance towards, social services. Caroline claimed that "I don't want to get a psychologist from the public social support institution because we don't trust the institution. They will gather information on us." Besides, adolescent mothers also perceived themselves to be discriminated against and felt excluded from the decision-making process while working with public institutions. The respondents shared the impressions of being treated as social assistance recipients instead of autonomous agents. Caroline said that "The people in the public institutions think we are not good persons... They don't explain [anything] but give orders like 'you have to do this or do that.'" As seen from the interviews, these feelings prevented the adolescent mothers from developing a sense of trust and cooperation with social services.

To improve the design and delivery of social services, both adolescent mothers and helping professionals gave their opinions. First of all, most of the adolescent mothers wish to receive more types of benefits. Their demand of improved financial support could not be reduced to a planned reliance on the social assistance system. Instead, they showed a strong desire to be independent, have their own flat to live independently, get assistance in finding jobs, and finish their education. The helping professionals agreed on providing more extensive assistance in regard of education, psychological support, and legal issues. However, they argued that financial support and housing assistance should be distributed to the families with poorer financial conditions but not to adolescent mothers as a whole. Echoing the adolescent mothers' comments, the helping professionals also saw the needs to educate helping professionals for a better understanding of adolescent motherhood. However, when talked about the change of legal framework, the helping professionals showed less optimistic. The current government in Poland strongly supports Catholic values and attempts to restrict sex education in schools, while also curtailing the sexual and reproductive health services. Although many demonstrations have been held, there has been no indication that the government would change its stance on these issues.

In my discussion with Martyna, two potential strategies of supporting adolescent mothers were brought up. One concerns setting up a user organization; the other one involves using different methods to disseminate the voices of adolescent mothers. The establishment of a user organization was supported primarily by adolescent mothers. However, while some of them showed interest, they did not contribute with more comments. For Martyna, who raised the idea, it was worrying that she might not be able to receive enough support from the group of adolescent mothers. During the research period, the women's movement was emerging in Poland, accompanied by online campaigns and demonstrations organized against the abortion ban. In this context, the possibility of applying the same strategy was discussed mainly with the helping professionals. Surprisingly, they questioned this initiative and expressed doubt as to the capacity of the topic adolescent motherhood, as well as sex education, to attract sufficient public attention. Staff A further explained that unlike abortion, which easily triggers outrage, sex education was mostly considered as an intra-family issue. Hence, while the traditional family-centered system of support provided significant help to adolescent mothers, it also hindered such important topics from becoming part of public debates.

### **Discussion and recommendations**

At the beginning of the research, it was my hope that some systematic plans could be developed from the adolescent mothers' narratives. Instead, the data was analyzed in a manner of presenting different, sometimes conflicted, views. However,

some recommendations were developed during the research process, aiming to contribute to further discussion on the topic of adolescent motherhood.

In essence, there was a huge diversity among the adolescent mothers I encountered during the research process. Feminist scholars caution against making universal statements, as any generalized description may again label a given group or reinforce the existing stereotypes about it (Lessa, 2006). However, it cannot be ignored that due to the label of 'adolescent mother,' young mothers are often viewed through the lens of a certain framework, particularly in the context of the law and public attitudes. Hence, attention shall be paid not so much to solving the 'problem' of adolescent motherhood, but to dealing with the attendant oppressions. One important issue raised during the interviews was the necessity of, and difficulty in, changing the legal provision regarding adolescent mothers' custody rights. As witnessed in the research, both adolescent mothers and helping professionals are often powerless in the face of the system. Therefore, to achieve a structural change, cooperation with services users and other professionals should be considered.

Besides, adolescent mothers appreciated being engaged in decision-making, which highlighted the importance of user participation in social work services. Although forming an adolescent mothers-led organization is but a momentary initiative, it can also be understood as the expression of adolescent mothers' will to speak out and act in their own interest. As the interviewed adolescent mothers expressed a lack of knowledge about the social assistance system, the social workers could play an important role in assisting the actions with their knowledge, resources, and their experience in funding. It could be extremely helpful to the development and sustenance of the adolescent mothers' organization.

Acknowledging the differences among cultures, I would like to propose some ideas based on the research findings and the conducted discussions, as starting points to promote better support measures for adolescent mothers. First, the use of the Internet should command more attention. Organizations ought to develop an informative online space with clear guidelines for adolescent mothers. Meanwhile, a long-term campaign is in demand to help change the public opinion. Social workers and adolescent mothers can work together to reveal the real situation of adolescent mothers and the oppressions faced by the group. Creative methods including online posts, street theatres, plays, and human libraries could be employed. Moreover, discussion and education schemes for helping professionals are needed. There should be more conferences, meetings, and trainings to facilitate the discussions of the stereotyping of marginalized groups.

In assisting the establishment of a user-led organization, one should identify the adolescent mothers who are active in the online community as well as other channels, and who have the potential to assume the mantle of leadership. They, too, could benefit from trainings on the relevant knowledge and skills. Besides, linking them with the leaders of feminist movements and social work disciplines

will provide an opportunity to expand the available sources of support, and raise the awareness of feminist and social work leaders on this particular issue.

## Conclusions

Although adolescent motherhood is not an old concept, it has sparked controversy and has often been misread since its appearance. Taking Poland as an example, this research intended to give voices to adolescent mothers and understand their ideas of the welfare policy and service provision. Based on the investigation of the Polish system of support for adolescent mothers, it was established that with a strong family-centered discourse from society, adolescent mothers were mainly taken care of by their family of origin. As such, they were nearly invisible both for social services and in public discussions. The conducted research highlighted the barriers for both adolescent mothers and helping professionals. Meanwhile, the possibility of facilitating structural change was also discussed.

The research results and recommendations of this case study must no doubt be critically examined for their applicability in other locations. Nonetheless, the research provides an insight into social services targeting adolescent mothers, while also serving as a stepping stone for discussions on the necessity of macro practice in addressing their needs. As for its dissemination, this research was shared with all the respondents and organizations in Poland in an effort to start the discussion on adolescent motherhood.

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## Streszczenie

### **Analiza usług z zakresu pomocy społecznej dla dorastających matek. Studium przypadku z Polski**

Macierzyństwo nastolatków to problem globalny, który wzbudza wiele kontrowersji i błędnych interpretacji. Paradygmat ryzyka został dostosowany w politykach i praktykach ukierunkowanych na ciężę i macierzyństwo nastolatków. W tekście został dokonany krytyczny przegląd różnych perspektyw teoretycznych, i dominującego dyskursu na temat tego zagadnienia. Wybierając podejście feministycznym, w badaniu przeprowadzono studia przypadków na terenie Polski. Przeprowadzając wywiady z dorastającymi matkami i pomagając profesjonalistom, ustalono, że kontekst społeczno-kulturowy silnie wpływa na świadczenie usług. Między innymi brak wsparcia społecznego, bariery prawne, dyskryminacja towarzysząca profesjonalistom i społeczeństwu, to główne problemy wymagające poprawy. Na podstawie badań sugeruje się, że wsparcie dla dorastających matek powinno być rozwijane w oparciu o podejście antyopresyjne. Konieczne jest otwarcie dyskusji na temat macierzyństwa nastolatków w sferze publicznej, aby zakwestionować dominujące dyskursy na ten temat. Poza tym praktyka wymaga większej uwagi i działań w celu zaspokojenia potrzeb matek w wieku dojrzewania. Omówiono również możliwość tworzenia organizacji samopomocowych, jako jednego z rozwiązań tego problemu.

**Słowa kluczowe:** nastoletnie matki, praca socjalna i pomoc społeczna, podejście feministyczne

## African Elderly Refugees' Perspectives on Needs Assessment and Response Processes in Refugee Camps in Uganda

### Abstract

Globally, older refugees have been receiving minimal attention due to their limited involvement in expressing their needs and because of limited statistics provided on this group. This study employed a research design using qualitative approach to understand how older refugees perceive the process of needs assessment and social support in Ugandan refugee camps. Three Focused Group Discussions involving 21 older refugees (12 female and 9 male) and 5 in-depth interviews involving social workers were conducted in the Bidi-Bidi and Adjumani Refugee camps.

The findings of the study show that older persons perceive themselves as being selectively supported, while they also notice that there are no clear criteria to identify their needs which are not prioritized, support groups exclude some of the older refugees, and there are no specific organizations that work with older refugees. On the other hand, social workers reported some methods used by them in assessing the needs of older people, such as legal aid clinics, community-based volunteers, and focused group discussions.

The study concludes by emphasizing that all interventions implemented by social workers and their agencies during social emergencies targeting older people, and the positions (voices) of older refugees as service users, should take precedence over the conventional routine activities that do not create much positive change in their lives. The recommendation is that older people should feel included in all decisions that target them throughout intervention programs or support projects cycles.

**Keywords:** migration, elderly refugees and their needs, social workers, social intervention programs, refugee camps in Uganda.

### Introduction

Rigorous and comprehensive assessments of migrant needs at borders points, transition centers and refugee camps are instrumental in providing the required information for supporting different categories of refugees including older people (Nicole,

2018). Due to the high influx of refugees, limited attention has been put to all these diversities, and older people are no exception (Milner and Gil, 2011). The process is worsened by cases of corruption, limited or outdated equipment, and a shortage of skillful personnel to carry out the assessments, which result in uncoordinated, inaccurate and therefore unreliable data (UNHCR, 2018). Planning proper activities to respond to the needs of older people has not been successful yet, due to the lack of prioritization and scarce scientific studies (Chemali et al., 2017; Milner and Gil, 2011). This undoubtedly leaves gaps in the quality of services provided to older refugees. It is, therefore, crucial to know their perceptions in this regard.

Studies on older refugees' situation have been conducted worldwide in the past two decades, for example on the Syrian refugees in Lebanon (Chemali et al., 2017), the Kosovan refugees in Albania (Drumm, Pittman and Perry, 2004), the Karen refugees in Burma (Greene and Graham, 2004), among others. All these studies have been done outside Uganda, in different contexts and without a specific focus on the perspectives of older persons and social work emergency responses. It is upon this background that this study sought to understand how older refugees perceive the process of needs assessment and social support in Ugandan refugee camps.

### **Contextual background**

Globally, events such as hurricanes, tropical cyclones, landslides, earthquakes, volcanic eruptions, tsunamis, famine, inflation, wars such as the Arab Spring, diseases such as Ebola (which is currently affecting the Democratic Republic of Congo), combined with economic difficulties, have resulted in situations of social emergency which causes mass human evacuations (Greussing and Hajo, 2017). In as much as there is no clearly known number of refugees worldwide, the United Nations High Commission for Refugees (UNHCR) estimates it at over 65 million people, of whom 50% are older people (Nicole, 2018).

Older refugees have always suffered from psychological, emotional, and physical torture during and after transit, whenever emergency occurs (Chemali, et al., 2017). International corporations have always tried to respond, but due to legal and sovereignty limitations, they have often failed to do so (Harkins, 2012, Drumm, Pittman and Perry, 2004). This is evidenced by individual countries' failure to honor the 1951 UN Convention and the subsequent 1967 Protocol. For example, though refugees exhaustively substantiate their eligibility for protection, individual countries mostly deny it (Alexandre, 2016).

In most countries with open border policies for evacuees, such as Uganda, many refugees feel unwelcome upon arrival (Chemali et al., 2017, Alexandre, 2016). Older refugees have always received minimal attention due to limited involvement and inaccurate statistics, which have hindered effective planning (Chemali et al., 2017, Drumm et al., 2004). This is further exacerbated by the limited personnel to

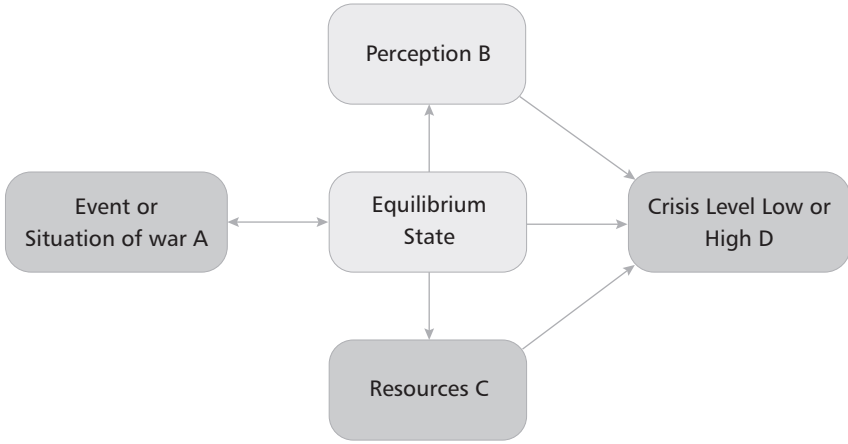
handle older people during social emergency. Therefore, in conjunction with other factors such as the economic, social, political will, this leaves little attention to the specific needs of older people, who eventually end up in despair (Gatrell, 2017). By 2018, over 1.5 million refugees from neighboring countries had entered Uganda (UNHCR, 2018). However, just like in developed countries and in other African nations, there has been no clear record on the exact number of older refugees settled in the various refugee camps located in the country.).

### Theoretical background

This study was conceptualized based on three theories that provided basis for an analysis of the findings from the field. These included the crisis intervention theory, the theory of aging, and the migration theory. All these theories have linkages to questions how older people face challenges during social emergency, while also demonstrating how social workers intervene to ameliorate the languishing of these vulnerable people.

**Crisis Intervention Theory:** Lindmann's work is considered a baseline for the development of the crisis intervention theory (Lindmann, 1944). However, recent scholars argue that, the work of Gerald Caplan and his colleagues at Harvard University with immigrants moving into Israel after World War II, was also fundamental in the development of the crisis intervention theory (Boss et al., 2016). Caplan argued that a crisis is triggered when a person faces a problem to which he or she appears without having an immediate solution, and which remains insurmountable for the time being, thus calling for the application of various problem-solving methods to address it (Caplan, 1974). This is followed by various attempts to give solutions to the problems including social work intervention. Caplan's crisis-theory is grounded in the concept of homeostasis. According to him, the organism constantly endeavors to maintain a homeostatic balance with the outside environment. When this balance is threatened, either by physiological or psychological forces, the individual engages in problem solving activities designed to restore the said homeostatic balance. This is what older refugees go through during emergencies. Due to the inability of individual older refugees to recover their homeostatic equilibrium, social workers employed by governments and NGO agencies step in as the agents of change who respond to the needs of these people based on a given agency's programs, policies, and professional values (Baitenmann, 1990, p. 73).

In the framework above, older people are in a homeostatic state when facing no problems at the equilibrium point. However, if any emergency occurs at point A, it causes a natural reaction in people to maintain their homeostatic state, and hence a perception of the situation is developed at point B. At this point, the interpretation and conclusion made by older people, whether negative or positive, will make them investigate the resources available at point C, so as to respond to the



**Fig. 1:** Conceptual Framework for the Crisis intervention theory

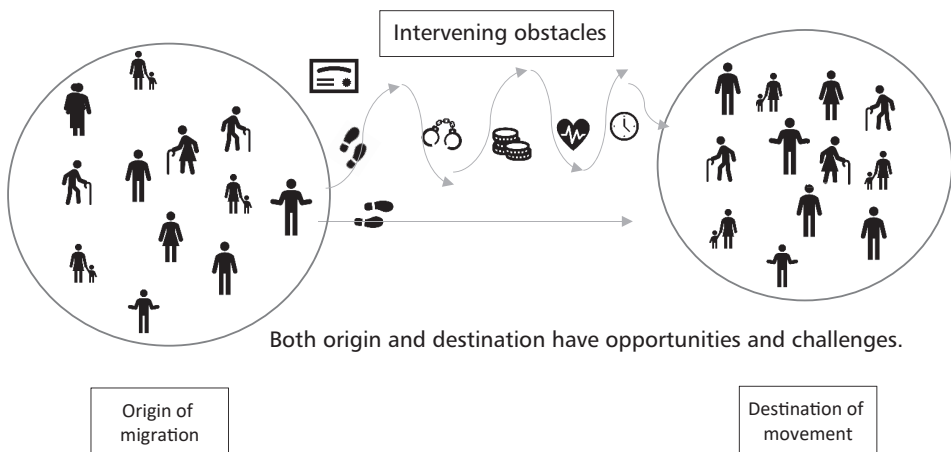
Source: Caplan, 1964, p. 201, Crisis intervention theory.

emergency at hand. This is done as an attempt to maintain the equilibrium status. A low or high crisis state is reached at point D when the crisis overwhelms the individual’s available resources to sustain the equilibrium. This renders them vulnerable and in need of external assistance to restore their homeostatic state. It is at this point that social work intervention comes in, to try to restore the lost homeostatic state. This is done through needs assessment and responses, with the belief that the social worker’s interventions will be as appropriate based on their professional training. However, it is important to listen to the beneficiaries to ascertain how they perceive the interventions, which is precisely the intention of this study.

**Theory of Aging:** One fascinating development during the second half of the 20<sup>th</sup> century was the study of aging (Bengtson et al., 2016). As a group of social scientists elaborated in a study about aging, research on aging mainly involved the application of two main theories: classical and contemporary. Different schools of thought including functionalism, social conflict, social interaction and exchange, symbolic interactionism, phenomenology, and social constructivism, have all contributed a variety of theories on aging (Bengtson et al., 2016). Pivotal to these theories was the focus on social gerontology which captured the disengagement theory and modernization theories from the 1960s and beyond. However, at this point, the idea of stratification of people by age advanced. What is interesting in these theories is that they all suggest that aging is not a uniquely biological but also a social process, and a structured feature in society. They further contend that age determines people’s roles in society (Bengtson et al., 2016). This is attributed to Ageism, Age Stereotypes, and Subjective Age, all of which are connected to one’s physical health, personality traits, and social behavior, while also shaping the life goals people set and pursue (Diehl and Wahl, 2015). Other important areas to consider regarding

this model is how people evaluate themselves based on health and physical functioning, cognitive functioning, interpersonal relationships, social–cognitive and social–emotional functioning, lifestyle and engagement (Diehl et al., 2015, p. 12). This requires attention from social workers in their interventions.

**Migration theory:** Several theories have been advanced to explain and analyze migration, which are linked to various fields. For the purpose of this study, the push and pull theory initially advanced by Lee (1966), and recently by Amaral (2018) provide a ground for analysis. According to Amaral (2018), migration as an act involves a starting and ending point, and distance is always the superseding obstacle to people's movements besides other push and pull factors. This is true with older people are not willing to change location who due to advanced age, even in life threatening situations such as war. Amaral (2018) supports this argument by arguing that the situations at the departure and destination points, along with the arising barriers to movement and personal factors (age, health and economic status), work together to determine migration trends.



**Fig. 2:** Origin and destination factors, and intervening obstacles in Migration

Source: Design based on E.L. Amaral (2018, p. 4), *Theories of migration*.

In the above diagram, under normal circumstances the situation at the origin of migration is similar to that at the destination, i.e., full of opportunities and challenges. But if the challenges at the origin become increasingly threatening to life, people choose to leave and go to another destination for safety reasons. However, between the points of departure and terminus, there are always challenges and opportunities that need to be overcome before reaching the end point, known as the 'intervening obstacles.' With reference to this study, older refugees are the people who go through these migration processes from the point of departure to the terminus. They transcend all the intervening obstacles and reach the destination

point like many other refugees. In the case of our diagram, the places of origin and destination are presented with similar challenges and opportunities. Conversely, being new in the destination location and having often lost many of their economic and social networks, older refugees may find it hard to cope with these difficulties and live a meaningful life. Unfortunately, their concerns are rarely vocalized. It is at this juncture that the services of social workers and social service organizations are highly demanded by these refugees. However, understanding older people's perceptions of the needs assessment processes (other than the services they receive as 'regular' refugees) is vital.

### Methodology and research description

**Research design:** This study adopted a descriptive research design using a qualitative approach based on Focused Group Discussions (FGD) and In-depth Interviews to generate and analyze the perspectives of older refugees on the social work interventions during social emergencies. It involved a scientific method in which the views of the participants were heard and described without influencing them. A qualitative research approach was employed as a scientific method to collect and analyze data. It enabled the researcher to understand better the meanings, the metaphors and the contexts of the elderly.

**Approval:** The study proposal was approved by the Faculty of Education and Pedagogy of the University of Warsaw as part of the author's thesis submitted under the Erasmus Mundus MA in Advanced Development in Social work. The study location was on the ground in Uganda, where the Office of the Prime Minister (OPM) and its subsidiary, the Regional Desk Office (RDO) which is mandated to handle refugee-related matters in the region, permitted data collection through the Camp Commandants (CC) of the Bidibidi and Adjumani refugee camps.

**Study population and sampling technique:** The participants comprised of older refugees and social workers responding to social emergencies. Although Uganda has many refugee camps in the Northern region, such as Acholi-Bur, Kiryandongo, Umvepi, Bidibidi, Rhino Camp, Palorinya, Maji, among others, the study limited itself to frontline social workers who had been involved in social emergency responses in the Bidibidi and Adjumani Refugee camps for at least three years. The Bidibidi refugee camp is one of the largest refugee camps in the world, with a total population of over 270,000. As of October 2018, Adjumani has a population of over 95,982 (UNHCR, 2018). Following the influx of refugees in Uganda, many social workers have been involved in social emergency responses including helping older persons.

Participants were selected using the purposive sampling technique. The criteria were met by 9 male and 12 female South Sudanese refugees aged 60 and above, who had a valid identity, ascertained by attestation and national identity cards issued by

Office of the Prime Minister (OPM) of Uganda. The ability to speak English and a prior experience of living in the refugee camp for at least three years was also important. Similarly, 10 frontline social workers were approached to participate in the study, but the researcher managed to reach only five among them, who were selected purposively to participate in the in-depth interviews.

### **Data collection methods and procedures**

Focused Group Discussion and In-depth Interviews were used collect data from older refugees and social workers respectively as follows:

**Focus Group Discussion (FGD):** A total of 21 older persons were mobilized and invited to participate in three focused group discussions comprising of 12 female participants and 9 male participants who took part in the study on different schedules, days, and locations. The first FGD involved 7 older refugee women, the second one involved 6 older male refugees, while the third involved 4 female and 4 male older refugees.

The Focused Group Discussions FGDs. Firstly, the researcher was introduced by the block leader and the program was handed over to him. The researcher then introduced himself and explicitly elaborated the study purpose, clarified how and why the participants were selected, and stressed that they had the right to refuse to participate in the study by withdrawing their consent if they felt dissatisfied with the discussion process. They were further informed of what the information would be used for and requested to sign a participation consent form voluntarily. All the invited participants agreed to participate in the study, and none of them withdrew his or her agreement of participation.

**In-depth Interviews:** The researcher employed in-depth interviews to collect detailed information from frontline social workers involved in social work emergency response. Under this arrangement, 10 social workers from different organizations, such as the International Rescue Committee (IRC), Dan Church Aid (DCA), Transcultural Psychosocial Organization (TPO Uganda), and the Uganda Reach the Aged Association (URAA), were purposely selected and invited to participate in the study. The researcher was able to only reach and interviewed five out of the invited ten. For the sake of these interviews, the social workers determined the venues and times of meetings based on their work schedules. The researcher recorded some key responses on his notebook. A voice recorder was used after asking consent from the respondent, for documenting the interviews, which were transcribed later for analysis.

**Data processing and analysis:** The data collected from the FGDs and the in-depth interviews was transcribed. After transcription, the researcher read through the transcripts to identify the arising issues based on the research questions. Thematic and content analysis was adopted to analyze the data. Thematic analysis involved



the determination of themes based on the research questions while content analysis involved direct quoting of responses. The findings were then presented as themes and quotes.

### Study results

This section focuses on the results generated from the perceptions of older people of the criteria used in needs assessment by social workers. It will further discuss the perceived, felt, and assessed needs of older persons together with the implications associated with such interventions. Finally, this section elucidates the factors—both internal and external—that hinder social work interventions with older people during social emergencies as presented by practitioners.

#### Older persons' perceptions of the criteria used in assessing their needs

In trying to understand older people's perceptions of the criteria used by social workers during needs assessment, older people were asked to give their views on the ways their needs in the refugee camp were handled during social emergency situations. Similarly, social workers were asked to share their experience in this regard during social emergency situations. The findings are presented as an outline of themes arising from the responses given in the course of FGDs and in-depth interviews with older persons and social workers, respectively.

**Older people are selectively supported;** when asked to give their views on the ways their needs were assessed in the camp, older people had a similar response in all three FGDs. They argued that needs assessment was done selectively. Some of the older people were not reached at all. In some blocks (villages), the assessment was done, and people were provided with clothes, shelter, houses, and some other Non-Food Items (NFIs), but other blocks were left without consideration. One older woman stated: "... we are here, people come and write our names and promise to come back, but you wait for them for years." Another one interjected and said, "We think they use our names to get money and use it for themselves..." (participant # 4, female, FDG 1 and # 6, female, FGD 1).

In a similar tone, another older woman said:

Ever since I reported here, the only items I received were a tent, cooking materials, and that is all, I have never seen any social worker come and talk to me, I just see them riding motor cycles or vehicles, if you stop them, they say they will come back. (participant # 5, female, FGD 1)

This indicates the turmoil older people go through during emergency and even after settlement. The process of needs assessment is not properly organized and

fails to facilitate relational practice, in which social workers establish a good relationship with the client.

However, when social workers were asked about their opinions on the same issue, they reported that due to limited resources and project designs they were not in a position to reach all locations, which caused older people to view them as selective and not willing to offer holistic support to them. However, they argued that some older people present themselves to visitors (NGOs, Researchers etc.) as very vulnerable, weak and having no capabilities of doing something that can support them. This therefore makes it necessary to support them because some older refugees were still capable of working, to change their lives while living in the refugee camps in Uganda.

**There are no clear ways of identifying older refugees:** Social workers argued that the way older refugees are identified was unclear. One social worker reported that “what we do here is more of registration when people arrive at the reception center and after that we get for them the NFIs and food or refer them to partners who provide such support, but not specifically to older people”. This is an indication that older refugees’ needs are not the priority during refugees’ needs assessment. It therefore scores high if social workers pay proper attention to older people in terms of assessment when they arrive at the reception, paying due respect to their cultural backgrounds which plays a linking role in facilitation of coping up with the challenges at hand (Tribe, 1998).

**Observation of the vulnerable older persons:** A social worker reported that a common way they use to assess the needs of older people is observation. This involves just looking at the person and evaluation if a given individual needs to be attended; in most cases, they are issued the NFIs and provided with the plastic sheeting from the UNHCR for tent construction. However, this applies to those who might have been worn out by the long distance covered during the trek.

**Older refugees’ needs are not prioritized:** Another important aspect was that the needs of older refugees are not prioritized. They are treated like any other refugees in the settlement. Much as senior refugees are supported by some organizations at some point, it is not guaranteed that such support is routine. For example, during food distribution, some older people may be prioritized. Those who are completely unable to stand in line for too long are the ones who are prioritized in most cases, yet this is equally based on observation rather than listening to these people. For example, one older refugee reported,

These people make us go and stay hungry during the food distribution week, at around 5:00 pm they close the distribution point and they tell us to come back the next day. They do not consider that we have to walk a long distance to the distribution points. (participant # 2, female, FGD 1)

This confirms that the prioritization of the needs of older people at the Bidibidi and Adjumani camps is not properly streamlined, as expressed by the social workers and the refugee themselves.

**Group support excludes some older refugees:** Social workers raised concerns about the system of group support which they believe does not present all older refugees with equal benefits. Moreover, they argued that, apart from exclusion, group support in the camp favors only those older people who are able to turn up for group meetings and keep up with the group activities. One social worker remarked that, “giving support in a group is good but it does not give us the time to listen to each individual, [as the meetings are] at times dominated by some vocal members, and [so] minority tribes within the group stand a higher chance of exclusion.” This overlaps with what one older woman confessed: “For me, I don’t know how people are selected to get services, you just hear [that] people are in a group and are being helped” (participant # 5, female, FGD 3).

This leaves out the real issues and methods of interventions that could properly support older people. Therefore, social workers need to retrieve their role of resource mobilization and intervention autonomy, which would position them to attend to the felt needs of older refugees in camps.

**There is no organization that works directly for older people:** Another item signaled by social workers was the absence of an independent organization that would work specifically with older refugees. The interviewed social worker argued that if there was an organization dedicated specifically to working with older refugees, it would broaden the outreach in this population group. The social worker added that the current Implementing Partners (IP) and Operating Partners (OP) in the camps have various areas of focus, and in most cases older people tend to be left out. For example, the United Nations International Children Education Fund (UNICEF) is intended to aid children as a United Nations agent, the UN Women responds to cases of gender-based violence as a specialized agency affiliated by the United Nations. Therefore, having a specialized agency within the UN umbrella would help respond to the contextual needs of older refugees at the camps.

### **Social workers’ views on best practices and challenges in handling needs of older persons**

When asked to comment on the best practices in assessing the needs of older people, social workers had pointed at the following means:

**Legal aid clinics in the camps:** In the field of promoting the rights of older refugees, especially on property and various abuses, social workers stated that activities were put in place that aim at promoting the rights of older refugees, in particular with regard to abuse and land grabbing by young people. They argued

that organizing legal aid clinics days in the camps with the assistance of police and legal officers from the UNHCR helps not only to follow up on individual cases but also register them and raise awareness. To this end, the social workers affirmed that this best practice, which could help reduce the challenges faced by older people, rests in the hands of fellow energetic evacuees. This tallies with what the examined older refugees mentioned in their FGDs, i.e., that their rights were not fully upheld in these camps, especially with respect to land grabbing based on the reason that they are perceived as old and lacking the energy to dig, and with regard to the theft of their property and other manipulations that affect their wellbeing. Still, older refugees believed they would get the required protection from the community as it used to be the case in the past.

**Use of Community-based volunteers:** As a means of reaching each individual in the settlement, all the interviewed social workers reported that their organizations had recruited community-based volunteers to help in the mobilization of the community members, follow up on cases and report to them for effective service delivery. This is done not only to connect the community to the organizations but as an employment opportunity for the refugees. However, some social workers had issues with relying on community-based volunteers, complaining that they were not doing the right work, which left some older refugees without any support. One social worker said, "These people called community volunteers; they are making our work difficult. You find the same volunteer working for more than three organizations and keep identifying the same older people to benefit from the support given by different organizations" (Social worker URAA, Adjumani).

This conforms to the concerns of one older woman during an FGD, who noted that, "These people (volunteers, social workers, and block leaders), they bypass us, they select their tribespeople and write their names to be given support and [as] for us, we remain [overlooked]..." (participant # 2, female, FGD 2).

Looking at the above scenarios, organizations try to ensure that services are delivered to vulnerable groups in the camp by applying various approaches in their interventions. However, it becomes problematic when brilliant ideas introduced are not monitored and turn out to be a barrier to effective program execution. A centralization of volunteer recruitment would eliminate the dual responsibility that gives a leeway to individuals receiving support more than once. However, such a centralization process would need to be carefully implemented because some blocks or villages lack people who can serve in such capacities, which might result in further exclusions.

**Focus Group Discussion:** Social workers had divided views on using FGD as a means of assessing the needs of older people. The proponent argued that using FGD as a method of gathering the views of older refugees gives opportunity for every group member to participate and the decision reached is owned in case an intervention is planned. A DCA social worker remarked,

Personally, I have been involved in FGD; you know [that] these people do not have a long concentration span, so FGD keeps them in tune because they debate with people within their level of understanding. In regards to that, personally, older people easily open up and share their problems and concerns during a FGD better than any other method. (social worker/DCA protection assistant, Bidibidi refugee settlement)

On the contrary, another social worker spoke in favor of one-on-one conversations, because they enable social workers to reach even the most vulnerable refugees, who are unable to walk to the meeting venue.

All these arguments demonstrate a variety of benefits and disadvantages depending on the method and context of application. For example, the reason given by one social worker who said that older people were enabled to interact with their age-mates is very vital. Interaction acts as a healing moment as people share their experiences with one another and, above all, break the chain of loneliness. However, this requires social workers to be adequately equipped to assess the context under which they are to apply whatever method of assessment they choose to apply. Eventually, the outcomes of these two methods being used concurrently will not only generate much satisfaction with older people but also offshoot the demerits encountered when using one method at a time.

### **Challenges faced by social workers while carrying out needs assessment during social emergencies**

When asked to provide some challenges faced when assessing the needs of older people, social workers provided the researcher with the following feedback:

**There is high rate of refugee mobility:** Social workers reported the needs assessment processes as a hindrance. A social worker who had been intervening older refugees directly during activities that benefitted them, found them to be mobile. Most of his interlocutors keep relocating, as loneliness affects them to the degree that they prefer going to areas they felt were more secure. This is especially true with the people who find themselves located amidst a different tribe and fail to fit in, and/or look for their close relatives. For instance, upon arrival older refugees like any other capable person are issued a tent, plastic sheeting from the UNHCR, and a plot to start a family. Thus, due to the inability to find a better place to live, they abandon their places of stay and move to other locations where life seems to be easier. This poses a big challenge to the assessment process and interventions.

**There is a gross misconception regarding the needs assessment of older refugees:** Another challenge raised by the social workers is the ignorance among older refugees who associate every assessment performed by social workers to food and NFS distribution. This has made some of them hesitant to provide information that might be vital in planning interventions that concerned them. This observation corroborates with the remarks made by an older refugee during FGD. The said

refugee stated, "These people come and write our names, they do not even give us anything, some you see on motorcycles, so for us now, we don't want them to deceive us, and they fail to come back" (participant # 6, female, FGD 3).

The above is a clear indication that there is a big gap in the ways needs assessment is done. Older people are not sensitized properly before needs assessment is conducted. This is attributed to insufficient training, too much workload, organizational policies, and a sense of disconnect between social workers and the communities they serve. It is therefore vital that organizations and social workers revise their strategies so that older refugees get to understand why and for whom they conduct the needs assessment. This will improve the quality of social work, and reduce stress among social workers as they realize the outcomes of their activities.

**There is a high level of bureaucracy:** Social workers spoke of another challenge to needs assessment with older people: the increasing bureaucracy. When asked what bureaucracy meant to them, one social worker defined bureaucracy as the process in which permission is required to do a needs assessment, or the resources to conduct assessment take too long to be provided or released, respectively. They added that bureaucracies that pose challenge to them come from different angles: their organizations, with the OPM and the UNHCR being the lead agencies responsible for refugee activities in the settlement. As for the major challenges in their organizations, they listed overlong releases of working advances and procurement processes as factor that extend and distort the work plan. This partly contributes to the refugees' conviction of being lied to, and their consequent hesitancy to share information with social workers. For example, one social worker admitted it could take up to 2–3 weeks before a request is approved due to procurement procedures.

### Discussion and recommendations

During the research process and data analysis, the following recommendations have been identified, developed and subsequently discussed with the service users and providers:

**Adoption of a service user-led approach in needs assessment during social emergency activity:** Just like any other individuals, older refugees have their perception of needs assessment, including it meets their demands. Eventually, what social workers assess and respond to determines the satisfaction and wellbeing of older people in their new homes. However, this requires setting a positive tone, listening to their stories and finding upsides in their narratives while keeping them aware of how they triumphed during previous emergencies, in order to encourage them to move on (Greene and Graham, 2007). From this background, older people in this study confirmed that most of the assessment targeted food and non-food items, as well as shelter and health, which are referred to as the 'assessed needs.' However, according to the study participants, taking part in the assessments does

not guarantee being supported later on. Sometimes such support never comes, and yet life must continue. Those who oversee such services do not understand what old age means, and therefore they fail to handle older people as important and deserving clients, as contended by Bengtson et al., (2016) in their theory of aging. Therefore, the management of services addressed to older refugees must be revitalized.

**Actions speak louder than words but solutions should consider assessments of actions.** The way the needs assessment of older refugees is conducted during social emergency situations is inversely proportional to how well the needs are responded to (Chatty and Marfleet, 2013). This indicates that social workers need to execute their responsibilities professionally and come out with the right results. The findings of this study demonstrate that the failure to identify the right needs leads to responding to the wrong problem and eventually limits the choices available to measure the outcome. For example, the interviewed older refugees expressed a strong need for psychosocial support or mental health treatment, but most needs assessments of needs that social workers normally conduct were related to food and NFIs, which failed to account for what they have gone through. Therefore, having the skills to do what is adequate, at an adequate time, and in an adequate manner, will always make social work practitioners achieve maximum results during social emergency interventions.

Furthermore, approaching needs assessment with predetermined answers usually creates biases, especially with older people presumed to be unable to support themselves, which leaves a negative bearing in their lives, renders them dependent and, above all, is very misleading (Greene and Graham, 2007: 205). Therefore, appreciating the fact that some of these older refugees are ‘transgenerational refugees,’ who have witnessed a lot and have acquired highly developed coping mechanisms, is vital (Greene, 2002; Rowe and Kahn, 1998). Additionally, it is important to be mindful that older refugees own an innate self-righting skill called resilience, which they use interchangeably with positive coping, adaptation, and persistence, which is very instrumental in helping them overcome the challenges they encounter (Winfield, 1994).

**Using professional skills and experience to overcome  
the challenges encountered during social emergency interventions.  
What are the escape routes?**

Professionally, social workers in the humanitarian field desire to execute their duties to change the lives of their beneficiaries regardless of the challenges, according to the findings of this study. However, several internal and external factors beyond their control influence their efforts, both positively or negatively. These internal factors include bureaucracy, limited donor funding, a shortage of trained staff, and the way projects are designed, which bars them from fully executing their cardinal

responsibilities independently. Social workers execute their responsibility targeting numbers within a given period. This affects the core values of practice which are based on relationship building rather than numbers (IFSW, 2014; Dominelli, 2004). Instead of accountability to older refugees, social workers are accountable to their managers and eventually leave their clients unattended. It is therefore incumbent upon humanitarian social work to fight for, and gain back, their lost autonomy if they want to be relevant to service users through manning mainstream activities.

Other factors that influence social work needs assessment include the challenge of coexistence with the host communities, competition from the IPs and OPs during emergency responses, large, OPM-allocated field sites, and the local politicians and their unending demand with regard to intervention modalities. These have always created dilemmas with respect to the consideration of limited resources, demands from supervisors and donors and, above all, the professional values of social work that should be upheld during practice. It is, therefore, important to separate social work from other operations through professional associations at local and international levels to prevent practice adulteration. This will build confidence in social workers, who will realize that service users are indeed closer to them than it may seem; in consequence, the lives of vulnerable groups such as older refugees may change for the better.

## Conclusions

Much as this study has its many confines, it is believed that its findings will encourage academicians to begin the required discussions on what social workers have in store for older refugees during social emergencies based on the presented perspectives. The study findings indicated that the perspectives of older people during social emergencies are not central in the designs of programs or the delivery of services. These have a lot of negative effects not only on older people but also on the sustainability of programs or projects initiated with limited resources available. It may, therefore, be concluded that in all interventions implemented by social workers and their agencies that target older people during social emergencies, the positions (voices) of older refugees as service users should take precedence over the conventional routine activities that fail to exert positive change on their lives. Older people should feel included in all decisions that target them throughout the programs or projects cycles.

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## Streszczenie

### **Perspektywy osób starszych – uchodźców z Afryki, na temat oceny ich potrzeb i odpowiedzi na nie w obozach dla uchodźców w Ugandzie**

Ogólnie na świecie mniej uwagi przywiązuje się do sytuacji uchodźców w starszym wieku, z uwagi na ich ograniczone zaangażowanie w walkę o swoje prawa oraz z powodu małej liczby statystyk prowadzonych na temat tej grupy. W badaniu wykorzystano plan badań, w którym zastosowano jakościowe podejście w celu zrozumienia, w jaki sposób starsi uchodźcy, postrzegają proces oceny potrzeb i wsparcia społecznego w obozach dla uchodźców w Ugandzie. W celu uzyskania bardziej pogłębionych informacji, przeprowadzono trzy dyskusje grupowe z udziałem 21 starszych uchodźców (12 kobiet i 9 mężczyzn) oraz 5 szczegółowych wywiadów z udziałem pracowników socjalnych w obozach dla uchodźców Bidi-Bidi i Adjumani.

Wyniki badań pokazują, że osoby starsze postrzegają, iż są wspierane selektywnie, nie ma jasnych kryteriów określających ich potrzeby lub nie są one traktowane priorytetowo, a metody wsparcia grupowego wykluczają niektórych starszych uchodźców. Nie ma także konkretnych organizacji współpracujących z tą grupą docelową. Pracownicy socjalni wskazali na kliniki pomocy prawnej, wolontariuszy lokalnych i dyskusje fokusowe w grupach, jako na metody stosowane w ocenie potrzeb osób starszych w obozach dla uchodźców w Ugandzie.

Badanie kończy się wskazaniem, że wszelkie interwencje przeprowadzane przez pracowników socjalnych i ich agencje podczas kryzysowych sytuacji społecznych, skierowane do osób starszych jako użytkowników usług, powinny stać się priorytetowym zadaniem oraz mieć inny system działań niż konwencjonalne, rutynowe podejścia, nie powodujące żadnych pozytywnych zmian w ich życiu. Starsi ludzie powinni czuć się włączani we wszystkie decyzje, które są skierowane do nich w projektach i programach pomocowych.

**Słowa kluczowe:** migracja, starsi uchodźcy i ich potrzeby, pracownicy socjalni, programy interwencji socjalnej, obozy uchodźców w Ugandzie

## Part Two

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### **Understanding the Socio-Political Systems in Social Work Practice**



## **Migrant Empowerment from State-Funded Financial Support: The Experiences of Filipino Families Assisted by Poland's "Rodzina 500 Plus" Program**

### **Abstract**

Contemporary social policies and programs increasingly favor financial support due to its cost-effectiveness and reported positive effects towards program beneficiaries, including their empowerment. Empowerment as a focal concept in social work highlighted in its newest global definition is considered useful to test the effectiveness of social interventions making up for deficiencies of evaluation tools. Whilst there is a strong literature on the impact of various financial programs, the relation of empowerment and the use of cash were not widely discussed. Moreover, the existing research is confined to general impact evaluations of poverty, income, and gender discussions on the beneficiaries considered as vulnerable. There is an absence of literature on the effects of financial programs addressed to specific population groups that are non-vulnerable yet equally exposed to risks and marginalization in society. This is a qualitative study using the "Rodzina 500 plus" program in Poland as a case to investigate the relation of the use of cash in financial programs to the perceived empowerment of migrant families of Filipino and Mixed Filipino-Polish beneficiaries. The findings of this study demonstrate that empowerment is strongly affected by the use of cash, however various factors related to the subjects' distinct identity as migrants defined their overall empowerment experience. This study aims to promote empowerment-oriented social work practice while elevating the voice of the marginalized social groups, such as migrant families.

**Keywords:** "Rodzina 500 plus" program, financial programs, migration, empowerment-oriented social work

### **Introduction**

Social work and social assistance are two intertwined concepts that grew as a response to the needs of people and society, reflecting social protection values through social programs and social policies. Social protection programs are established to minimize poverty, vulnerability and social exclusion in modern society (ILO, 2012). However, the increasing integration of the neoliberal concept of development created

hybrid forms of social protection programs that allow the integration of market-oriented policies in social welfare (Ferguson, 2011; Abromoritz, 2012). One of the most dominant forms of social protection involves financial programs that offer direct income provision through cash transfer to families and individuals. To an extent, it is even considered as the ‘magic bullet’ or ‘panacea’ for poverty alleviation (Berg et al., 2013, p. 91). It launched 20<sup>th</sup> century social assistance provision into a new revolutionary process, where giving cash instead of traditional in-kind and professional services is preferred (Molyneux et al., 2016).

In the European Union member states, the standard cash benefit expenditure amounts to an average of 1.6 % of the country’s GDP, a figure that has been relatively stable for years. In Poland, on the other hand, the expenditure in this regard has been improving slowly and between 2000 and 2012 it remained below the average, fluctuating between 1% and 0.7 %, a trend that dominated the country since the collapse of the Soviet Union (Hagemeyer, 2017, p. 4). However, 2016 saw an increase in cash benefits expenditure in the country to around 1.85 %, which exceeded the EU average and was attributed to the introduction of the new financial program known as the “Rodzina 500 plus” program (Bojanowska, 2017, p. 14).

“Rodzina 500 plus” is currently the largest social program helping citizens financially in Poland. It started in 2016 as a product of political victory of the Law and Justice party, which promised the establishment of a ‘pro-family’ program offering monetary support to families. The concept is based on monthly financial transfers worth 500 PLN (approximately 120 euro), offered initially to families with two or more children.<sup>1</sup> At the time of the study, the funding was granted for each second and subsequent child and for the first child in families below the minimum income threshold. After its success, it was extended to all families residing in Poland, regardless of their socio-economic level and nationality. According to the latest statistics, as of 2017, the program coverage reached 2.62 million households, amounting to an estimated total of 5,490,419,240 euros that year (Ministry of Labor and Social Policy, 2018). One of the goals of the “Rodzina 500 plus” program is to increase birth fertility rate in the country as a countermeasure to the persistent issue of aging in Polish society, which is a trend observed throughout Europe (Pierzchalska, 2017). This is founded on the assumption that Poles abstain from creating bigger families (with 2+ children) due to financial constraints connected with raising children in Poland (Wisniewska et al., 2017). Affording a monthly financial support to those with more than one child and to poor families was supposed to encourage

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<sup>1</sup> The study was taken at the time when the program was extended to families with two or more children. As of 2021, the program embraces all children in the family by the age of 18. The eligibility criteria may change in the following years; to keep track of the future amendments, visit: <https://www.gov.pl/web/rodzina/rodzina-500-plus>

the creation of larger families in the country, and improve the general well-being of children and families.

Significantly, the “Rodzina 500 plus” program changed the structure of the country’s expenditure, where cash is now favored as an instrument. Before 2016, the country prioritized the expansion of care services, but it changed when the program was introduced, dropping the use of services expenditure to less than one-third (Hagemeyer, 2017, p. 6). Currently, Poland’s expenditure based on this policy instrument is said to be close to the forms used in the UK, Ireland, Luxembourg, and Austria.

Amidst the dominance of cash in social policies, most of the studies on financial programs are focused on impact evaluation rather than evaluating specific component or goals of the program (Barber and Gertler, 2010, p. 68). The relation of the use of cash and its impact on beneficiaries’ empowerment is not a central point of analysis whilst the use of cash has been a constant target of critique on its potential of either empowering or allowing dependency, demobilization, and deactivation of people (Ferguson, 2011; Germany, 2016). Equally, the existing empowerment discussion on cash-based transfer programs is dominated by a discussion on poverty alleviation and women empowerment or selected economic, health, and educational dimensions. While there exists a rich and extensive literature on the various aspects of the impact of financial programs, studies on specific populations such as migrants, minorities, and persons without citizenship status are very rare, or almost never discussed (UNICEF, 2015).

For the social work profession, the concept of migration has been widely explored, however, the discussion involvement is usually limited to issue-specific cases such as focus on migration labour, support for migrant workers, social integration and family (re)unification processes (Cox and Geisen, 2014). The lack of studies on the impact of social protection programs addressed to migrant communities who benefit from country programs creates a vacuum in the understanding the complexities of their experience and the relation to the aim of their empowerment and well-being. The overall aim of this article is to investigate the relation between the uses of cash in financial programs to the perceived empowerment of beneficiaries of the program. Specifically, this study seeks to critically evaluate its implications to social work professionals and their roles in the context of international social work.

### **Theoretical background**

Empowerment is a centrally located concept in contemporary social work which has been largely studied and defined in many fields (DePauw and Driessens, 2017; Pulla, 2013). One of the most popular definitions was coined by Rappaport, who attributed empowerment as “a process by which people, organizations, and

communities gain mastery over issues of concern to them” (1987, p. 122). It is an “open-ended construct” that is and must be understood depending on the context of its definition (Zimmerman, 1995, p. 583). The commonality among definitions points to an increased feeling of power, freedom, decision-making, and capacity to influence one’s own circumstances, thus placing empowerment not only as a process of improving the lives of individuals, families, and communities but also as the goal of social work. The International Federation of Social Workers (IFSW) highlighted empowerment in its global definition.

Social work is a practice-based profession and an academic discipline that promotes social change and development, social cohesion, and the empowerment and liberation of people. Principles of social justice, human rights, collective responsibility and respect for diversities are central to social work. Underpinned by theories of social work, social sciences, humanities, and indigenous knowledge, social work engages people and structures to address life challenges and enhance wellbeing. (IFSW, 2014)

Given its value to the social work profession and its impact to people, Walsh and Lord proposed that empowerment is the appropriate operational definition for effectiveness and alternative mechanisms in measuring effectiveness of intervention especially in the field of social sciences and human development (2004, pp. 41–43). Taking this in perspective, the researcher tried to explore empowerment in the financial program and reflect on its effects on beneficiaries. More than just ascertaining the level of empowerment, the use of measuring the empowerment lies in assessing its value and importance to social work profession (Perkins and Zimmerman, 1995; DePauw and Driessens, 2017). To this end, the researcher used different empowerment theories and other relevant frameworks in exploring empowerment in the financial support program.

### **Psychological empowerment: empowerment as a distinct experience**

Psychological empowerment (PE) refers to the individual level analysis of empowerment (micro-level) which is the central focus of this study. It is defined as a “process through which people gain more control over their lives, take a proactive approach towards communities and develop a critical understanding of their socio-political environment” (Dop et al., 2016, p. 652).

At the level of individual analysis, psychological empowerment is “purely intraphysic” (DePauw and Driessens, 2017, p. 527). Zimmerman (1995) presented three dimensions of empowerment under PE, namely: Intrapersonal, Interactional and Behavioral dimensions. Intrapersonal empowerment refers to the self-perception of empowerment including competence, confidence, and self-esteem. Interactional empowerment is the interpersonal dimension or the relationship of the individual to his environment including critical consciousness and mobilization of resources

among others. Behavioral empowerment refers to actual actions made to influence outcomes such as community or political participation (Zimmerman, 1995; Perkins and Zimmerman 1995; Dop et, al. 2016).

Zimmerman (1995) viewed psychological empowerment as a dynamic experience that is felt differently by different people and in different contexts. One may feel empowered in the beginning and become disempowered later on. To this end, he advocated that it is impossible to create a universal measure of empowerment, as it may not mean the same thing for every person, community or organization. However, empowerment in a specific setting is possible if it is defined by the experience of the people and their life experiences (Zimmerman, 1995, pp. 586-587). This framework broadly guided the thematic discussions about empowerment in this research, especially in the creation of adapted empowerment scale and analysis thereafter.

### **The strengths perspective: empowerment comes from people strengths**

The strengths perspective is deeply embedded in empowerment, since the focus here is not on vulnerabilities but on positive elements in the individual that allow them to cope and function effectively. It is not about denying one's weaknesses but rejecting their role as the starting point (Pulla, 2017). The researcher included this framework to highlight the good rather than the problematic dimension of the experiences of the respondents. Saleeby (1996) discussed that there are three important concepts in strength perspective, namely: empowerment, resiliency, and membership. While empowerment focuses on the control over one's life, resiliency points to one's ability to thrive and survive amidst risks and vulnerabilities. Resiliency entails both reducing risks and strengthening protective factors (Early and GlenMaye, 2004, p. 123). Saleeby also stressed membership as a crucial concept, referring to citizenship or non-citizenship as it allows alienation, marginalization, and oppression (1996, pp. 298–299). The concept of membership is highly applicable to the research in terms of discussion on the lived experience of migrant and other specific groups of populations.

### **Ecological framework: empowerment is affected by the environment**

According to Rappaport empowerment is also a “multilevel construct” that applies to individual and the organizations or the environment around him (1987, p. 121). He noted that empowerment can be understood by studying the environments where one could either get empowerment (thus enabling one to participate) and, secondly, the environments where empowerment is less expected because of the built-in constraints that keep one isolated. It is proposed that the conditions of participation in these environments have a direct impact on one's empowerment. This is how ecological framework becomes important in empowerment discussions,



where looking at the person's ecology is the 'antidote' to social work's person-centered approach 'one-sidedness' (Rappaport, 1987, p. 142). This framework is highly useful in discussing the context of migration and the impact of living in Poland for migrant Filipinos and Polish- Filipino families living in an environment that can isolate or integrate them (Paat, 2013).

### **Capability approach: empowerment is dependent on resource and its utility**

Resources are basic constructs of empowerment (Perkins and Zimmerman, 1995, p. 571.) Amartya Sen's (1999) capability approach (CA) proposes that expanding people's freedom creates capabilities, which in return allows the realization of their potential and improves their well-being (Dasuki et al., 2014, p. 323). Sen contended that basic ingredients for empowerment is not only about having resources but more on the process of access to that resources and how its utilized for one's goal (Muhammad, 2011, p. 10). By focusing on freedom, it acknowledges that people's well-being and empowerment are affected by many factors making their capacities relational to their context and arrangement in society (Frediani, 2010). People are not equally placed to realize of their capabilities because of certain barriers arising from inequalities in society such as class, ethnicity, race, gender, and sexual orientation, among others. The focus of the capability approach lies not with the utilization of resources but with how it was made possible and what these resources do to people: do they empower and allow participation or enable isolation or marginalization? Sen (1999) also spoke of agency as highly related to highly related to the concept of empowerment. Agency freedom is "what the person is free to do and achieve in pursuit of whatever goals or values he or she regards as important" (Sen, 1985, p. 203). In turn, empowerment is the achievement of increased agency that enables the pursuit of goals (Trommlerova et al., p. 2015). The use of the capability approach in this study allowed the researcher to investigate if a subsidy of 500 PLN per month creates freedoms, capacities, and empowerment among the respondents.

### **Methodology**

This study uses qualitative-case study methodology where the relation of the use of cash to the empowerment of migrant families is investigated using an existing local financial program in Poland as a case. The qualitative research allows the construction of meaning for phenomena experienced by certain individuals or groups, helping capture valuable insights into people's lived experience and the interpretation of their social world (Creswell, 2007). The opening section of this study contemplated a virtual non-inexistence of studies focusing on the impact of a local government programs on the empowerment processes of migrant people

and communities. Therefore, the use of the case study method is relevant to present their realities and opportunities by uncovering a relation of empowerment with the established programs examined in this research. A combined purposive and snowball sampling strategy was applied to reach the target of eight services users as interviews (Sarantakos, 2005). While purposive sampling allows the researcher to carefully select the sample which can adequately contribute to the understanding of the case being studied (Ritchie et al., 2015), combining it with snowball sampling helps invest the strength of respondents as experts in their own migrant context in terms of their usefulness for the study.

The main respondents in this research include beneficiaries of the programs targeting the grantees who are defined for this research as “the parent/s or guardian/s receiving the money from the program,” as they are the active actors in the implementation of the program and it is assumed they are the ones deciding on the utilization of the cash grants awarded to their respective households. The criteria were pre-planned and determined based on the relevance of the respondents’ participation in the phenomenon being studied (Frost, 2011). The criteria did not specify the income level and did not preclude any certain type of migrant family dynamics but rather included both migrant Filipino families and mixed Filipino-Polish families.

While the main respondents in the study are the beneficiaries of the “Rodzina 500 plus” program, the researcher opted to include the expertise of two social workers to allow multiple perspectives on the studied case and enable a social-work oriented discussion about the case. In case studies, getting more key informants with expert knowledge of the events being studied invites wide-ranging interpretations of the case and significantly increases the validity of the case study. This is one of the practical advantages of the case study, as it allows for multiple perspectives and source data collection about the case (Vissak, 2010).

### Research questions

How does the use of cash in financial program relate to the perceived empowerment of its beneficiaries?

#### Sub-questions:

- a. How do Filipino migrant and Mixed Filipino-Polish families perceive their empowerment in relation to receiving financial support program?
- b. Do migrant Filipino families and Mixed Filipino-Polish families feel stronger in their family roles because of the program?
- c. What other factors affect the feeling of empowerment of Filipino migrants and Mixed Filipino-Polish families in the program?
- d. What are the implications of cash-based financial programs for the roles of social work?

## Results and recommendations

In the following discussions, the researcher would like to highlight the findings and implications that are directed to the social work profession, inducing the readers' critique and reflections on the proposed ideas and findings from this study.

### The decisions on "worthy" clients

This arises from the fact that there is less attention, if not neglect, from the profession and society toward specific groups of the population that are considered non-vulnerable; still, they are populations with specific narratives and needs, and as such they are usually unrepresented and overlooked. Specific groups include but are not limited to migrants, religious-ethnic minorities, stateless individuals, solo-parents, and bi-racial families among others (UNICEF, 2015). The lived experiences of the families in connection to the program showed elements of social exclusion and marginalization amidst the recipients of public support and assistance. This is attributed to the insensitive design of 'local' social protection programs—financial or otherwise—which are intended for the local populations under the false premise of their homogeneity and the presumed universality of their needs.

The most dominant feature of empowerment is its focus on contextualized or grounded experience of an individual, where empowerment can only be achieved if it is anchored in peoples' diverse and distinct identities (Rappaport, 1987). The assumption that all 'locals' are the same and should therefore be treated the same only spearheads the marginalization of the 'others' in the population. The concept of power relation is strongly embedded especially in the discourse on migration and between the concepts of 'the citizens' and 'others.' According to the Bordieuan perspective, citizenship regulates people's access to scarce resources where privilege is conferred to citizens against migrants (Bauder, 2008, p. 327). This supports Saleeby's concept of 'membership' in the strengths perspective, which sees citizenship as an important factor of empowerment, where not being a citizen only allows alienation, marginalization, and oppression, consequently disempowering rather empowering the affected individuals (Saleeby, 1996, pp. 298–299).

It is necessary though to highlight that in terms of international instruments and standards such as those adopted by the International Labour Organization (ILO), the United Nations (UN), and many others, significant milestones have been reached in ensuring human rights, social justice, and social inclusion in most countries of the world. Requiring its member states to follow suit and enact common standards obliged local government-states to create programs that reflect these rules. However, the problem lies in the implementation of local programs, and a case in point is the "Rodzina 500 plus"

program that stemmed from international standard of non-discrimination in terms of family benefits.

The International Labour Organization (ILO) defined the minimum standards of social security (social protection) which Poland ratified as an ILO member. The Social Security (Minimum Standards) Convention, 1952 (No. 102) guided the program design of the “Rodzina 500 plus” program, which provided a major step in creating frameworks that protect migrants’ social security rights on equal terms with the country’s citizens (ILO, 2013). Furthermore, in 2012 the International Labour Organization introduced the concept of “social protection flooring” under Convention 202 that stands for the “nationally defined sets of basic social security guarantees which secure protection aimed at preventing or alleviating poverty, vulnerability and social exclusion.” (ILO, 2012)

The Polish government adhered to the stipulated rules and created a universal benefit program that gives rights even to non-citizens to avail themselves of the financial program, however the international standard only lays the foundations while local governments have the discretion as far as program design is concerned, and this is precisely where the gap is located. Local governments do not pay much attention to the program’s impact on ‘the others.’ This study showed that locally funded financial programs such as the “Rodzina 500 plus” program, which opened its door to the non-citizens, are positively affecting the experience of the migrant Filipino families and mixed Filipino-Polish families, albeit unintentionally on the part of the local government. Less attention to non-locals benefitting from the program contributed to an insensitive program implementation that overlooked the specific needs and requirements among other populations, such as the migrant communities. When empowerment is treated as a spill-over effect rather than an intended goal, it generates missed opportunities in strengthening its impact on the beneficiaries (Molyneuz and Thomson, 2011, p. 198).

The social work profession indirectly contributes to such a state of affairs. While we adhere to the values of social justice and empowerment (IFSW, 2014), the target population of the profession is still very limited to those vulnerable, disadvantaged, and marginalized groups that are closely linked to standard definitions and categorizations. It leaves behind other ‘specific groups’ living in the society: disenfranchised, unrepresented, and ‘invisible.’ Their migrant unique identities are not incorporated in the scheme, and thus they may end up having more difficulties in accessing social services in the most basic areas of health, education, and religion, because all the services are provided in Polish only (in the case of Poland), and thus tend to be out of reach for non-locals. The respondents expressed that these factors have a very strong impact on their personal and family lives. But then again, social workers only deal with the ‘problematic’ or ‘pathological’ cases, thus leaving these specific groups out and forcing them to cope with possible problems on their own.

### The 'best ways' of helping

The main objective of this research is to look at the potential of cash as an empowering tool. The summary of the research findings suggests that there is a strong relation between the use of cash in the financial program to the feeling of empowerment among migrant Filipino and Mixed Filipino-Polish beneficiaries. While this may offer nothing new in the general discussion on the use of cash, a further analysis of the use of cash by migrant families presented interesting data. Empowerment again is a highly contextual process where a specific population has a different set of needs and priorities, thus making their empowerment experience totally different from others (Rappaport, 1981). Migrant empowerment is highly reflective of migrant aspirations, among which community integration and adaptation are two important goals.

Migrant families—much like local families—are “open, dynamic systems that are susceptible to changes,” but they also experience more social pressure in conforming and adjusting to mainstream society (Paat, 2013, 956). Most of the respondents expressed their aspiration to stay in Poland permanently, and to prepare for that they spend part of the money on activities that would profit them in a long run. They send their children to classes and activities that foster community integration and allow them to get involved in the local community. This is where cash becomes an empowering tool for them. As understood by Sen (1999), empowerment explains cash flexibility as a more effective tool for migrants. Flexibility equates to a freedom that creates capabilities among beneficiaries, he argued, it is about more than just having the resource (cash), but rather about the way people access that resource and what that resource helps them become (Dasuki et al., 2014). Based on the earlier discussion of the government’s reluctance to take into consideration the impact of the program to the ‘others’ in the community, the use of the strengths perspectives in the study allows one to focus on the patterns of empowerment and resiliency showcased by the respondents. Their freedom to utilize cash gave them opportunities to make up for the lack of the overall program.

Building on the strength of the families, they were able to function effectively and access the services regardless of the absence of formal support. There is no role for a social worker under this program, and the absence of a supportive mechanism (not only applicable for social work) in the program lessens the perceived empowerment of the beneficiaries. However, families were able to look for alternative sources of support. Both the migrant Filipino families and some among the Filipinos married to Polish citizens mentioned the social benefits they receive from the strong Filipino community existing in Poland (De Guzman and Garcia, 2018). Informal networks, social networks, and relationships provide individuals with support and encouragement (Saleeby, 1996) that make up for the lack of formal institutions. For social work, it is highly important to appreciate that instead

of looking at one's vulnerabilities, investing in one's strength and capacities allows more empowerment among beneficiaries.

### **Social work and financial benefits separation and the segmentation of assistance strategies**

As mentioned earlier, the lack of support from formal institutions and agents lowers the empowerment ratio. Kaplan and Girarf (1994) argued that "people are motivated to change when their strengths are supported." In other words, support is a form of empowerment (Saleeby, 1996, 304). However, in the case of "Rodzina 500 plus," support is not available beyond the technical part of the application and in the context of social work; financial programs are not considered as a social work function (Tutak, 2010; Pierzchalska, 2017). Therefore, it can be concluded that in Poland there is a strong separation of social work field from public welfare field which in return affected not only the empowerment of beneficiaries but also led to overlapping and uncoordinated service provisions to people. One family can receive benefits from multiple services: low-income families can at the same time benefit from social work, get family discounts, and still be eligible for 500 PLN transfers from "Rodzina 500 plus." Cost-effectiveness-wise, this is very problematic and leads to disenchantment and uproar among taxpayers.

While it tries to be more professional in providing services, social work slowly separated itself from the field of public assistance (Schram, 2012). Social work established its focus on protective and rehabilitative service and distanced itself from financial welfare. This tradition carried over to modern practice and is reflected in the current social service provision schemes. However, on closer inspection, this is not universally true but rather reflects country-specific social work practices. The absence of social work involvement in the financial program in Poland marginalizes certain specific groups and shifts the focus to 'pathological' cases. It seems that non-vulnerable populations tend to be neglected by social work professionals, and the only way they come in contact with them is once their status is elevated to a disruptive case or problematic context.

### **Local practice in an increasingly ethnically diverse society**

Lastly, in an era of globalization and migration, societies are becoming diverse more than ever before. One implication of this study is that Poland is becoming increasingly diverse. As Filipino nationals, the respondents have contributed to this change, too, but at the same time the increase of mixed families in the country will also call for reforms and modifications in the services and paradigms of helping at local levels. This study reflects both the social work and social welfare practices in

Poland as being ‘insensitive’ towards migration needs, which is somewhat expected from a country that has opened its door to the world and immigrants relatively recently. Local programs such as “Rodzina 500 plus” reflect the current orientation of the country, which is still very conservative and homogenous. But as societies advance, demographics change, and needs diversify accordingly. Both the country and social work professions need to deal with it. The inability to recognize the needs of the current diverse population only adds to the list services that may help but will not be responsive and empowering. This, in the end, creates gaps in practice and missed opportunities in the proper use of social services.

### Conclusions

Social work profession is constantly caught in the crossfire of answering the challenges of globalized societies and the conflicting paradigms of practice and knowledge. This study capitalizes on empowerment both as an end to, and means of, social work practice. Using the case of Poland’s largest family benefits program: “Rodzina 500 plus,” this study could provide a contextualized understanding of the empowerment processes that take place in the lives of cash-grant beneficiaries. In the conduct of such endeavor, the participation of migrant Filipino and mixed Filipino-Polish families added a new and interesting dimension to the study. It allowed this research to be the first one to tackle the intersection of empowerment with migration in the context of a local financial support program of the host country. This elevated the discussion and the reflection on the gap in the research on the financial program and the use of cash, as well as the attendant marginalization of a specific population—such as migrants, among others—in society.

Using empowerment theories in data collection and analysis, this research affirms the empowering potential of the financial program among migrant Filipino and mixed Filipino-Polish families, while emphasizing that the experience of empowerment is predominantly shaped by their identity of being migrants in Poland. The lack of supportive institutions, along with the flawed design of the “Rodzina 500 plus” program effectively decreases empowerment. On the other hand, using the strengths perspective, families were still able to show resiliency by finding an alternative source of support, resourcefulness, and innovations. The element of cash was proven to have assisted their empowerment because of the flexibility and utilities used accordingly to their specific needs and aspirations, such as the use of the money to integrate their respective families in society (Sen, 1999; Fenn et al. 2015, Muhammad, 2011).

Government insensitivity towards the needs of migrants and their families is proven to decline the impact of the program. However, this can be easily resolved by integrating migrant-friendly services, collaborative practice among agencies, and pro-active supportive roles of social work, as well as improving international

standards in social protection flooring. The future of this program relies heavily on the intention and willingness of the local government and its political stand on migration issues (Barber and Gertler, 2010; Molyneux et al., 2016).

In conclusion, it is not the intention of the researcher to promote either the financial program or a neoliberal agenda; instead, this research is a humble endeavor to open the discussion about the roles and the position of the social work profession in the advent of financial programs. This requires a critical approach to the existing paradigm of practice while staying true to the value and the central tenet of empowerment, social justice, and human rights. The conducted research was anchored in the personal reflection of the researcher, spurred by the question: If financial programs are proven to empower beneficiaries, is it not necessary for the social work profession to realign its practice accordingly?

On a final note, the researcher's goal throughout this research was pervaded with the following quote from Foucault:

We have to transform the field of social institutions into a vast experimental field, in such a way as to decide which taps need turning, which bolts need to be loosened here or there, to get the desired change. ... What we have to do ... is to increase the experiments wherever possible in this particularly interesting and important area of social life. (Foucault, 1988b, p. 165)

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### Streszczenie

#### **Wspieranie migrantów w ramach pomocy finansowej realizowanej przez państwo: doświadczenia rodzin filipińskich wspieranych przez Polskę w ramach programu „Rodzina 500 plus”**

Współczesna polityka społeczna i rosnąca liczba programów pomocowych sprzyjają wsparciu finansowemu rodzin ze względu na ich opłacalność kosztową i odnotowywane pozytywne skutki dla beneficjentów programów, w tym ich upodmiotowienie. Empowerment jako kluczowa koncepcja w pracy socjalnej, wskazana w jej najnowszej, globalnej definicji, jest uważana za przydatną do testowania skuteczności interwencji społecznych i nadrabiania braków narzędzi ich oceny. Chociaż istnieje znacząca literatura na temat wpływu różnych programów finansowych, relacja empowerment i przekazu środków pieniężnych, nie była dotąd szeroko dyskutowana. Ponadto istniejące badania ograniczają się do ogólnej oceny wpływu na ubóstwo, dochody i dyskusje dotyczące płci, koncentrując się na beneficjentach uznawanych za „wrażliwych”. Brakuje literatury na temat wpływu programu finansowego na konkretne grupy populacji, które nie są podatne na zagrożenia, ale w równym stopniu doświadczają ryzyka i marginalizacji w społeczeństwie. Jest to badanie jakościowe o wykorzystaniu Programu „Rodzina 500 plus” w rodzinach obcokrajowców w Polsce. Jego celem było zbadanie związku wykorzystania środków finansowych w programach pomocowych z postrzeganym wzmocnieniem rodzin migrantów z Filipin i rodzin mieszanych filipińsko-polskich beneficjentów. Badanie ukazało, że wykorzystanie dodatkowych finansów silnie wpływa na wzmocnienie pozycji rodzin, jednak nie wpływa na czynniki kulturowe związane z odrębną tożsamością rodzin. Niniejsze badanie ma na celu promowanie praktyk socjalnych zorientowanych na wzmocnienie pozycji rodzin, jednocześnie podnosząc zagadnienie grup marginalizowanych kulturowo w społeczeństwie, takich jak rodziny migrantów.

**Słowa kluczowe:** Rodzina 500+, programy finansowe i socjalne, migracja, praca socjalna zorientowana na upelnomocnienie

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## **An Analysis of Older People's Experiences and Conceptualizations of Community in Light of the Promotion of Well Being: A Case Study of Warsaw, Poland**

### **Abstract**

This research project analysed older people's experiences and conceptualizations of community to promote their well-being. This study highlights the importance of community as an important place for older people in ageing well and for their well-being. The initial assumption was that, from the viewpoint of living and working collectively, community and the social interactions it is host to—provided that these interactions are strong and well-established—not only gives older people a sense of attachment and belonging to their respective locality but also makes them emotionally, psychologically, physically, and socially healthy, and hence improves their well-being. The ultimate aim of this study was to analyse older people's experiences and conceptualizations of community in order to promote their well-being and highlight community as an important place for older people in ageing well.

**Keywords:** Older people, ageing experiences, well-being, age-friendly community, social environment, public and social spaces

### **Theoretical background**

This section covers the various facets and dimensions of the discussions on community and ageing and/or older people, the literature on this dichotomy between older people versus community, and the different dimensions that provide community social workers with different standpoints in exploring the issues of older people from within their local communities.

### **The ageing and community framework**

To date, major emphasis has been placed on the improvement of the physical environments, i.e. public spaces, housing, and public transportation, among others. This is premised on the idea that the ease with which older people can navigate

their environment creates the comfort and attachment in both the short and long runs as access to essential services is made possible. All these are very important in improving the friendliness of a given environment for older people. However, all of the above aspects only represent one (i.e. physical) dimension of older people's access to these spaces. In reality, the social and physical dimensions of older people's well-being are complementary, and therefore placing emphasis on one of them does not help much, especially with respect to the other groups of older people whose sense of community is mainly linked to social relationships. The age-friendly environment framework works to not only boost a proper inclusion of older people with various needs and resources but also support the enhancement of supportive built environments. Therefore, this framework largely tallies with the idea of ageing and community as a way of ensuring that people age with few or no barriers to a good life (Provencher et al., 2014).

### **Conceptualizing community Assets as a concept of community**

Assets can be defined as the collective resources possessed by a community and individuals, who can ultimately use them to enhance every community member's well-being (Foot and Hopkins, 2010). Within the frame of asset-based approaches, connectedness, capacity, and social capital are promoted as knowledge; skills, connections, and potential are made visible and valued in the process (Kretzmann et al., 1993). Essentially, assets are recognized as an integral part of any community as they bring people and communities together to achieve unprecedented positive change by using lived experiences, knowledge, and skills, i.e. the physical and social capital. Such efforts culminate into positive community engagement mechanisms. "Community engagement enhances learning and exchanging knowledge, identifying priorities and possibilities, making decisions, and making things happen" (Beeck et al. 2011, p. 34). Because engagement is a cooperative process, it can be construed as one that involves "working with people to address their well-being, crossing disciplinary boundaries, and using multiple knowledge from inside and outside the community" (Lommerse, 2014). As argued by Bell (2008), this allows individuals and communities to improve and celebrate their lives from within their perceived worlds.

### **Ageing in place – community as a physical environment**

The concept of community in social gerontology has always been connected to place as one of the important aspects for the lives and well-being of older people (Wahl, 2012). The interest in enhancing the idea of place to improve the lives of older people is seen to be backed by the positive goal of "ageing in place" (Tang

et al., 2012). The idea here is to elucidate on some of the roles that communities can play in supporting the continuity, livability, and connectedness of older people as they age (Keating, 2013). Much of the literature that pertains to ageing in place clearly indicates that older people would wish to stay put in their localities in their current communities (Lehning et al., 2012). They further highlight that, for example, ninety-three percent of older people in America would prefer to stay in their respective communities, but on condition that these localities have the necessary infrastructure to facilitate their needs. This is indicative of the fact that as people age from within these communities, they also grow a sense of belonging and connectedness, which therefore enhances their sense of attachment to people and place within their localities.

### **Shared interests as an idea of community**

Ideally, shared interests offer new ways of looking at or considering a community from the viewpoint of the interests shared among its members. This contrasts with the place-based conceptions of a community, as it transcends the physical setting to address the common interests shared among members (Provencher et al., 2014). Communities of interest have to be taken into consideration for their significance in later life because of the ever-growing involvement of older people (Means et al., 2012). This idea of community is closely related to the social connections and contacts within older people's surroundings, and therefore it is argued that place-based settings should be rethought in ways that incorporate the shared interests of older people (Means et al., 2012). With the available evidence of how social media and the Internet as a communication tool can help to curb social isolation and loneliness. As a concept, communities of interest may be useful in understanding older people, bearing in mind the growing use of virtual communication among older people themselves (Cotten et al., 2013). Also, communities link very well with older people that have lived in different locations, as they strive to keep their friends from the previous locations virtually through Internet connections and interactions. Li et al. (2014) highlight the cross-national communities that are established by older people while communicating with their friends and families abroad, while also accounting for how these communities create a multiple sense of belonging to symbolic and local places.

### **Research design**

The study employed a mixed methods research design, using qualitative approaches. As advanced by Israel (2012), studies that involve exploration of community phenomena or subjects can be conducted using a set of methods/instruments intended to extract as much detail as the researcher possibly can. The study employed a number

of instruments as described subsequently in an attempt to gain a deeper understanding, analysis, and interpretation of the different perspectives of the community experiences of older people (Doyle et al., 2009).

The main research question was "How do older people experience local community, attachment to place, and a sense of belonging?" The study utilized mixed qualitative methods in order to establish the quality of activities, situations, and relationships in giving a holistic description of events and situations. The study thus employed an interpretive strategy of inquiry in analysing and interpreting seniors' lived experiences. The sixteen research participants were seniors and community animators of the CAL (Centrum Wspierania Aktywności Lokalnej which translates into Local Activity Centre) organization. The data was collected using trend lines, sociograms, daily activity and weekly diagrams, asset mapping, semi-structured interviews, focus group discussions, and secondary data sources such as reports on older people in Poland.

The collected data was organized, manually transcribed, coded, thematically described, critically interpreted, and reported. The findings were organized into three themes, namely 1) community vitality, 2) social relations, 3) public and social spaces, which provided additional context for analysis and interpretation. Some of the key findings were the following: the sense of community, i.e. working together and the presence of social ties with community members, was found to be lacking. Senior citizens' social relations were found to be strong among family members but rather weak with other community members, such as their neighbours and fellow seniors in their locality. Also, seniors indicated having several obstructions in terms of access to and easy use of the public and social spaces. The key recommendations included emphasizing sociality, placing social transformation at the core of our consciousness as social workers in all interventions, and consulting seniors on the design of physical and social spaces for their maximum optimization.

### **Sampling procedure**

The purposive sampling technique was employed. Purposive sampling, as explored by Creswell (2011), refers to the selection of respondents that directly or indirectly serve the predetermined content and direction of the study. Therefore, the respondents were selected from among the older people in the CAL organization and community animators.

### **Profile of the participants**

At the time of the study, all the seniors were at least 65 years or older, with eight in their mid-sixties, five in their seventies, and one in her early eighties. All the seniors attested to having vocational diplomas except for one with a university

degree. They explained that having grown up in the socialist era, one of the main jobs was building the social fabric, and therefore nearly each of them was involved at one point in their lives. The only male senior among the participants was a retired plumber. There was no mention of having a disability—mental or physical—except for one person, who had an accident much earlier in their life and has since been using a walking stick. Certainly, the gender profile had a bearing on the findings considering there was only one male participant among the 16.

### **Research instruments and techniques**

As illustrated in the design, the study utilised a number of instruments in order to gain a deeper understanding and analysis of the older people's experiences and at the same time to ensure that, it was participatory enough for the older people themselves to feel ownership of the investigation and, consequently, the findings (Doyle et al., 2009). These instruments included community asset mapping (Israel, 2012), participant observation, focus group discussion, daily activity diagrams, flow diagrams, sociograms, trend lines, and finally, semi-structured interviews with the community animators who work with seniors.

### **Research findings – elderly people in the community**

This section covers the three major themes that were employed in the analysis and interpretation of the findings, namely 1) community vitality, 2) social relations, 3) public and social spaces, respectively.

Is the community alive?

The word community is derived from the Latin word *communis*, which means “shared.” The concept of sharing can refer to space, norms, values, customs, beliefs, rules, or obligations. The spatial aspect of community may be small and nearby, as when one refers to one's neighbourhoods; or it may be large and far-reaching, as when one refers to one's country or to society in general. (Berns, 2013, p. 334)

What does this really mean to seniors? Do they really feel that embracing this community dynamics really has any impact on their ageing process and ageing well for that matter? Firstly, as stated by Berns (2013, p. 335), “A community, as one of the significant microsystems, is a group of people living in the same geographic area (neighbourhoods, town, or city) under common laws; it is also a group of people sharing fellowship, a friendly association, and common interests.”

Specifically, the seniors were tasked to explain their perceptions and constructs of community and they seemed to agree with the above construct of a community, but of course, each added a personal feel of what it meant to them. This was indeed expected, considering that they all have lived different lives, and therefore had

different experiences, which therefore explains each one's standpoint on that matter. The majority (nine of the fourteen) did emphasize that community connotes people collectively living and working together to accomplish tasks for the benefit of all members, that is, living together as one people fighting for a common agenda. As one senior explains "of course it means people living and working collectively for the benefit of the entire community... in other words, giving all to your community for the sake of everyone's happiness." The other seniors emphasized the idea of collective decision-making as an important component of understanding community. One senior contended, "If every one of us is consulted and agree on what we want as a group then we are a community and that is a community... if that is not the case, what is the point of calling ourselves a community when we live, individualized lives as it were?" At this point, I really did not know where the talk of living individualized lives came from, but I was intrigued to find out what it meant, though at a later time. In addition, and adding weight to the above insights, the idea of living as an integrated group of people was emphasized by the seniors as integral to the idea of community as well. One senior woman pondered, "How can you call yourselves a community if you are not willing to go out and integrate with others?" Therefore, as highlighted in the voices of the seniors, even though they explained it and understood it differently, they seemed to stress the idea of togetherness with common interests in accomplishing tasks, while also emphasizing the idea of selflessness in being an active member of a given setting.

At this point, it was interesting to ask whether these ideas of community are alive in their local setting or environment. Ideally, this was meant to establish a degree of a sense of community, i.e. verify whether the idea of working together is alive in their local setting. Implied in this is trying to understand whether their perceptions and constructs of community are practiced to the same extent in their local setting of Grochów. As one senior explains, "coming together at the CAL, where we perform various tasks, makes me feel like I am working with a new family, which enriches my life in so many social and emotional ways like never before." Further, as highlighted by another senior woman, a retired public servant, "when we come together for cooking, drama, Tai-chi, computer lessons, or to share project ideas... I feel like we are fighting a battle on a united front of seniors. This does not only make me feel valued and respected as an individual, but also fresh, able and physically healthy." This in my view highlights the social ties that are created when seniors work together with a common cause, while also steering the direction of events as it were. Ideally, for this sense of community to exist in a very strong sense, it implies that seniors have to be willing to come out of their respective homes to join hands with fellow seniors or even with other people in advancing their cause as a people. At this point, it is clear to me that the seniors seem to agree with working together as a group, but this is highlighted in the sense of the



organization where they meet for various activities. However, what is not clear is whether this spirit of working together with other community members extends beyond the CAL to their neighbourhoods, other community members, and other seniors within their Grochów locality. If living and working together as a community ideally comes with benefits, how can this spirit of working together as seniors be promoted beyond just meeting at the CAL? What roles would a community social worker have to play to extend this spirit in a locality? In addition, would the seniors approve of such an initiative? Moreover, at the same time, do their socio-cultural ideals allow for such activities? All these questions at this point were hanging over the researcher.

In addition, inasmuch as collective working can sub-consciously enhance one's sense of belonging and attachment to place (Provencher, 2014), there was no indication that the same activities enhanced the sense of community, that is to say, a sense of togetherness and joining hands to perform tasks. As described above, it was a case of different seniors putting and focusing their energies where their specific interests were; but not working together for the good of everybody. Considering the various positive attributes that come with forging a strong sense of community, community social workers who work with seniors are obliged to promote social orientation. Specifically, social workers engaging in the construction of the social aspects of the environment should support older people in taking personal action in their own lives, as opposed to leaving the decision making power in the hands structures and systems. However, for any such sense or spirit of community to exist in a strong way, it has to be influenced directly and/or indirectly by the social relations that exist, that is by the nature of interactions (Hardcastle et al., 2011).

### **Social relations**

The collectiveness of people does not form a community—the latter is formed by the very simple interactions and feelings of belonging (Bacon, 2009). Interactions and feelings of belonging amount to a new form of economy, known as the social economy. The social economy is that which strengthens one's attachment to their respective environment, based on mutual respect, value and dignity for all members that are active and participative in this kind of economy. To this end, seniors were tasked to indicate the strength of their relationships to the various community members. Half the participants on the day had fair or weak relationships with their neighbours. This is very telling of the kind of value they attach to people around them and hence will determine how socially active and participative they will be within their local environment. The majority indicated good and strong relationships with their parents (in cases where they were still alive), strong relationships with

children, grandchildren and siblings. The strong family ties are very much explained by the deep-rooted family tradition of togetherness in Poland. "For Polish people, family ties are the most important kind of social relations...friendships matter too, but especially for older Poles, relationships that count as family, matter in qualitatively different ways" (Lynch et al., 2013, p. 85). One senior stated, "I have a big family, during 10 years two children were born. We all love each other very much. There have been no divorces. Some die, new babies are born: sorrow interwoven with joy." Another senior confessed, "Part of my family died, but then there are children. We love each other and we meet very often." Another interesting trend was that majority of the seniors indicated to have good or strong relationships with their fellow seniors. One senior narrates, "... I feel a sense of family and empowerment when I meet fellow seniors at the CAL and while performing other activities with seniors." This is a very positive indicator if seniors are to work collectively on certain causes that directly and/or indirectly affect their lives. It was relevant at this point to ask whether this could be a question of community leadership and action that is lacking among seniors to explore on their own, or a question of social workers empowering seniors to mobilize and organize themselves into a working community group to work collectively beyond the CAL.

Further, in an attempt to explore the factors and/or conditions that encourage mutual engagement and participative behaviour, the strongest argument manifested was the fact that for any senior to engage in any activity depended upon their individual preferences and choices. This very much explains the case for individual histories in the exploration of the issues of seniors. Some of the issues that were mentioned included one's social behaviour, self-esteem in dealing with others, one's experiences with past relationships, health issues, family-related problems, one's level of interest in the activities available, financial-related problems that affect one's esteem. As one community animator narrates,

Some of them have many financial problems, which tear down their self-esteem... As a result, they resort to heavy drinking as a way of forgetting their troubles... However, this creates still more troubles for them. Some become violent with the people around them, whereas others develop serious health issues with chronic illnesses... With this going on, their esteem reduces even further, adding more complications, and hence you do not expect them to participate in any sort of community activities, let alone social activities.

However, regardless of one's individual histories and complexities, the social relations depend on how strongly one feels this sense of community (Berns, 2013). It is from this sense that one gains the trust of others around them, which then translates into necessitating the kind of interactions that ensue.

## Public and social spaces

Seniors were tasked to draw-up trend lines, and daily and weekly activity charts (Heslop, 2002) which were intended to explore how social and public spaces have changed for them over time; they were also asked to explain some of the tasks that they engage in on a daily and weekly basis. This meant that the activities they engage in could show which spaces they access frequently, but also determine the accessibility of these spaces. It was a deliberate attempt to check what these spaces meant for them, how they have changed over time, and whether the changes allow them to perform their tasks and interact as they would wish. As it is the case, change is very much a part of life and we all live in a changing world. In fact, the eleven seniors that co-operated in this activity have experienced changes over the years in terms of infrastructural development, family and social relations with neighbours, including distance and frequency of interaction within their localities, the establishment of new parks, new and better means of public transport, medical facilities, and many new shopping centres close to home.

The following were the seniors' narratives of the changes in their localities over the years:

I live in a flat which is 130-years old and the street used to be very dangerous at night, but the flat has since been renovated, there is also a new medical centre nearby and the street is a lot more secure thanks to the ongoing crackdown on street criminals in the area. I have never been prouder of my home and neighbourhoods than now...

Another senior stated, "In 2014 new pavement was built. In 2005, garages were built under our window—a "nice" view... We have a new, beautiful, and very expensive stadium and new cheap underground. We have a "Biedronka" supermarket, which is cheap and well-supplied." Another senior stated, "They opened the "Biedronka" supermarket, enlarged space of the Polish Post, put up a promenade with coloured fountains in front of the church, opened a medical clinic "Petra Medica," and renovated the church." Another senior explained, "From 1972 to 2011 I lived in a building which is 120 years old. By 2005, it was a completely run-down house, [but] now it is renovated. They repaired the clinic, the Wedel factory, opened the National Stadium, opened the second underground line, and renovated Kobielska Street." Yet another one added, "Nothing has changed in my neighbourhood. Trees have grown around [the area]. There are new pharmacies. The supermarket was built in 2010. In addition, you can do your shopping on the Internet. There are more mobile phones. The Paca Centre (CAL) was established in 2012." All these narratives speak volumes in terms how one's sense of belonging and attachment to a place can be reinforced by changes that they feel reinforce their lives and create a sense of security around them.

As mentioned above, some of the seniors have lived in localities that have never undergone any transformation, at least according to the interviewees. "Nothing has changed in my neighbourhood." And yet, they still reside in the same localities. Could this be a case of adapting to a place regardless of what happens there? Alternatively, is it how one mentally and socially constructs their environment around them in a way that enables them to fully function and participate in it? As one senior male explains, "your sense of security is in your mind, if you feel safe, then you are [safe] and that's it." As Rantanen et al., (2012) contends, for one to function optimally within an environment depends on how well this environment addresses their capabilities, and therefore adapting to places that do not address seniors' capabilities might be seen as systematically marginalizing and socially excluding older people, as the environments around them are not in-sync with their capabilities.

In narrating on how their physical spaces have changed, seniors seemed to emphasize the importance of housing, security, medical facilities, shopping centres/ places, transport lines, and worship centres (churches) as the main changes easily identifiable within their respective settings. At this point, I was wondering whether these were the most important changes in their lives, or the most noticeable changes in their environment. Furthermore, I wanted to find out how these changes in the physical structures affect their lives and the accessibility of these public spaces. In fact, different seniors had had different experiences, some of which have made them feel disrespected and/or discriminated. Here are some of the seniors' statements:

"I live in a four-floor block of flats, on the top floor, but it [the building] has no lift... sometimes going up can be such a pain." Another senior stated, "The pavements in my area are so unfriendly, either too high or broken... Walking about can be a nightmare, especially at night." Another senior explained her ordeal with public transport, "Sometimes bus drivers are so inconsiderate of people like me. Before you can get on the bus and find a seat, he has already speeded off as if he drove a police car chasing a criminal... It is appalling!" Another senior bemoaned the fact that "usually, the gap between the bus or tram and the pavement is either long or really high, [and] you can easily break your leg while getting on or off... And remember, you have to do it fast, because the bus driver won't wait for you." Another seniors complained, "Sometimes the language about us used by the people on public transport is really heart-wrenching... just yesterday, a young man got on the tram and said that there's a lot of grey hair on this bus... of course referring to us." Yet another senior narrated her experience with the medical services,

You go to the hospital with a very long queue of people, and you have to wait for hours before you can see the doctor... as if that is not bad enough, sometimes the doctor will tell you that the pills are not available so you have to wait a couple of months or even a year... oh! The thought of having to queue up again...it is truly pitiful!

When we turned our attention to their shopping experiences in the supermarkets, especially, one senior wished that supermarkets could provide a separate service or queue for seniors because standing in the queues for too long caused them pain. However, other seniors immediately refuted that by saying that, "If they create a queue in the supermarket specifically for seniors, it might even be longer than the ordinary one and you [may] even take longer," a commentary to which they all laughed out loud, and suggested that instead, supermarkets could provide self-service counters to speed up things a little."

In terms of changes in regard to family trends, all interviewees admitted that some of their family members had either departed, moved on to other places, either in search of "greener pastures" or as part of the natural process of younger family members growing older and starting homes of their own. "My mother died in March 2014, she was 96 years old. My sister's daughter went to the UK. My family relations are very good, but they keep their distance," said one of the seniors. However, communication remains intact thanks to digital solutions, such as social media and mobile phones.

### **Recommendations for practice**

The study identified that interaction and social factors contribute strongly to individual well-being. "The self is a social self, and the world that people construct is a social world" (Brueggemann, 2013, p. 24). The social is around us, much like the air we breathe, and therefore it constitutes the milieu in which we all exist as human beings (Hardcastle et al., 2011). The social exists even before we are born, and continues even after we are dead (Hardcastle et al., 2011). "The propensity of people to create their humanity by shaping their culture and developing society is one of the permanent and ineradicable characteristics of the human condition, without which people cannot live rich and meaningful lives" (Brueggemann, 2013, p. 26). In any society, relationships, feelings, and the natural social values largely remain the cement that brings people together in a lively communal culture (Freire, 2000). The world is comprised of many social goods such as integrity, trust and honesty, which cannot be empirically observed, and therefore it becomes difficult for social workers or social professionals to estimate the full functions of these social goods; and hence, more often than not, they are sub-consciously left out, in the designing of social interventions (Brueggemann, 2013).

To this end, the social becomes a very valuable asset for people, who then use their sociality to construct a social reality of their own (Gergen, 1999). In this regard, sociality becomes the capacity of people to exhibit the social in their actions and lives (Giddens, 1979). Importantly, sociality is a quality that transcends mere history or a particular place or period; it is universal in nature and built into the genetic structure of humankind (Brueggemann, 2013). It is against this very

backdrop that I propose an approach comprised of interventions that support an age-friendly community, not only the seniors of Grochów but also those living in other settings, where these approaches can be applied.

In working with older people, focusing on a social orientation would imply assisting older people in restoring the social by working towards increasingly emphasizing sociality in their lives (Hurst et al., 2006). As highlighted in the analysis, the seniors' sense of community, construed as the strength of their interactions and relationships, did not seem to extend beyond the CAL and other venues they meet at for various activities. This indicates that sociality is missing in the picture. It is, therefore, necessary to support older people's efforts from within their localities to help them construct and reconstruct healthy social selves. It would be a very important starting point for seniors to understand and accept themselves as they come together to fight for a common cause. However, this would require the establishment of strong relational groups that give them a voice within their localities, along with enabling the seniors of Grochów to indirectly determine the content, structure, and values of their respective communities, other than the artificial systems imposed on their lives.

Essential to this social orientation of interventions is the idea of creating a new social sector of the local community and an improved atmosphere of social commons among older people, and between older people and other community members (Schutz et al., 1967). When morphed into relational working groups, they become a formidable entity with a much louder voice that can be used to fight for their rights as full-fledged citizens, and for their needs in general. For example, Age Concern Ukraine (2013) and many similar organisations explicitly state that self/mutual help is a key method in socializing seniors to achieve these goals. The working group becomes the social sector in the local community of seniors, by the seniors, and for the seniors. This empowers seniors beyond what organizations and their agendas can offer. In this regard, the social orientation serves to ignite and extend the social as a fundamental element of social interventions with seniors and other community members.

In addition, every individual shares him or herself with others by engaging others in socially constructing their unique selves. "Each of us is rooted in a biological organism that acquires a self only through interaction with the community" (Dean 1989, cited in Brueggemann 2013, p. 28). The milieu of the group and others that essentially defines the self depends on the existence of the community (Hardcastle, 2011). Also, lasting solutions to community problems rarely emerge if we are separated in "apathetic individualism" (Brueggemann, 2013). As mentioned earlier, the existence of this individualism was highlighted in the words of one senior, who explained there was no point in calling themselves a community if they lived individualized lives. Older people cannot control their futures if they rely on experts and systems to make decisions on their behalf and solve their social problems. "Before

action can take place, people must be connected in a recognizable group in which the personal troubles of each become [the] public problems of all” (Dean 1989, cited in Brueggemann, 2013, p. 29). Precisely, as older people actively engage in social discourse, it helps distil their common wisdom into ideas that can be implemented. In addition, this empowers seniors’ voice, self-determination, and the upholding of the rights and capacity to choose instead of abiding by what is imposed upon them by the so-called experts and systems that perpetuate passivity and discrimination. Consequently, this would allow seniors to create their own social life-world instead of having to settle for the discriminating systems and artificially created structures. I propose that with the help of community social workers, seniors can e.g. negotiate with local media to hold weekly sessions on television, radio, and in printed press, where they can talk about pressing issues. It is with such efforts that other actors will join hands with seniors to reverse the injustices that seniors have and continue to endure.

Moreover, it is quite important to move social transformation to the core of our consciousness as a field of focus for social work interventions (Hardcastle et al., 2011). “Our field’s understanding of social environments, of how and when fundamental, enduring changes in social environments occur, is very limited compared to our understanding of individuals” (Brueggemann, 2013, p. 40). This approach would systematically attempt to equalize the imbalance by bringing the concept of the social to the forefront. However, this would result from strengthening the creation and identification of assets, empowerment, and social justice, and by placing social thinking at the centre of all social interventions. “When we work together, we begin to discover that there is strength in our common action, hope in our unified ideas, and empowerment in our shared reality, which in combination help activate social justice as a norm in our society” (Brueggemann, 2013, p. 40). Ideally, this would require that social workers as agents of change encourage and help seniors in the formulation of social groups as a way of gaining a better sense of not only their strengths as a group, but also ultimately enhancing their sense of community. More often than not, people think of social groups as clubs for the youth and young adults, but social groups are also very important means of creating stronger social ties for older people (Van et al., 1997). These initiatives could take the form of community or senior centre group programmes (Age UK, 2012). In the provision of information about such programmes, it would necessitate that we work with the readily available seniors to reach out to other seniors, in this case those who might be most marginalized and therefore cannot have access to such programmes easily (Age UK, Brighton & Hove, 2012). This way, information can reach a great many.

Fundamentally, social groups are the building blocks of communities as they provide a significant number of social life components that are not always available in our system-based society (Halperine, 2001). Social groups become the basis for developing whole-mind thinking and positive peer relationships, and

building character. The analysis presented in the study indicates that seniors at the CAL are very willing to work with their fellow seniors, but that there are not many such initiatives that encourage this form of work, where they can join hands to present the issues of seniors in one voice. With such support, they are then given a platform to work with a concerted effort and speak with a unified voice. In addition, the grouping becomes a laboratory for democracy as people engage in teamwork, and assist members to obtain self-confidence and self-esteem in the process (Halperine, 2001). "The ability to establish and maintain social relationships is often a key indicator that an individual is [emotionally] healthy; and this is true regardless of age" (Brueggemann, 2013, p. 47). However, it is important to note that such social groups can be formed both among older people and between older people and other younger generations to share values and experiences (Age UK, Brighton & Hove, 2012).

It should also be mentioned that social groups can develop one's human sociability through cultural, religious, recreational and outdoor activities (Lee, 1988). Such activities help in engaging emotions and stimulating the senses. By activating reflection, engaging values, and using intuition, such groups help their members in integrated learning (Lee, 1988). These groups would help to bridge relationships in ways that help members meet their needs for validation and affiliation, and therefore provide the means for social affirmation and friendships. Furthermore, social groups function as laboratories of democracy, where older people can learn how to live cooperatively, and where opinions and attitudes are primarily formed in groups with which adults affiliate voluntarily (Van, 1997). "They help to create "habits of the heart": the mores that allow people to connect with each other and the wider community" (Brueggemann, 2013, p. 48). However, this would imply that for these social groupings to take effect, both public and social spaces should be optimized to best fit seniors' capabilities if the local community is to be deemed an age-friendly one (Rantanen et al., 2012).

Ideally, the optimization of public and social spaces would imply that the physical and social environment allows seniors to adequately use their capabilities. However, to ensure this, older people's views must be listened to and accounted for by allowing them to actively participate in decision-making and creating change and innovation in their locality of Grochów (Age UK, Brighton & Hove, 2012). It is from such consultations that dedicated spaces in public transport, medical and shopping centres can be rethought and put in place. Further, optimization would require that mechanisms are adapted to designing public and urban spaces and places that are sharable and inclusive to all, including older people. All these efforts will foster the establishment of inclusive, safe and diverse neighbourhoods for all ages that include carefully designed housing units for seniors if older people's assisted living is to be considered.

Also, once these spaces are fully and easily accessible, the following can be vital in making the locality even more age-friendly: promoting and encouraging the



participation of older people in the cultural and social life of their community. This can be achieved by availing seniors of a series of activities and events, which are affordable and accessible as a way of encouraging their integration into the community with other members (Plouffe, 2015); such activities might be intergenerational in nature to enable participants to share values and experiences (PHAC, 2015). It is important to promote the needs, potential, and rights of older people as full-fledged citizens among the public, and above all highlight the cultural, economic, and social contributions they make to their respective communities (PHAC, 2015). It is through such awareness that the negative, discriminatory, disrespectful, and dehumanizing language and acts among the public will be gradually but systematically eradicated.

In short, environmental and personal resources largely contribute to ageing well, as they impact one's immediate community environment, as well as one's neighbourhood, home, and the general public (Wahl et al., 2012). Inasmuch as the individual in the environment has to be explored to highlight the importance of older people within their communities and hence contribute to ageing well, it is equally important to stress the importance of the immediate physical, spatial, and technical environments (Wahl et al., 2012). It is only upon understanding the person-in-the-immediate-environment dynamics that a nuanced picture of the concrete dynamics of ageing well can be drawn. As a result, these factors directly and indirectly determine the kind and direction of community social interventions that can be advanced in working with older people from within their local environments. Even though there is a consensus among gerontologists that the physical environment can potentially impose significant constraints on the older people, especially in the advanced stages of life, it may also enhance opportunities for well-being and ageing well within their communities (Wahl et al., 2012). These opportunities lie in understanding the connection or disconnection that exists between an older person and their immediate environment. However, critically important to this stance is the fact that just as older people are a diverse group, communities world-over differ in many ways, too. This suggests that any kind of interventions must intersect with the local realities. It is the local realities that will enable us to understand the local perceptions of their respective communities (Ife, 2012). Understanding the empirical experiences of what and how older people make of their respective communities plays an important role in the kind of interventions that will ensue, and hence renders communities age-friendly in many respects (Provencher, 2014).

## Conclusions

Firstly, the participants' perceptions and constructs of community included working together with a concerted, shared decision-making with everyone consulted in the process, and in fact concurred with my personal construct of community. However, it was established in the analysis that these ideas of community were

not prevalent and hence not practiced in their locality. Secondly, in the analysis of their experiences of community, which was meant to check their social ties with different community members and the activities they engage in, I discovered that the family ties were very strong, but some of these existed at a great distance, i.e. in the cases where the family members are domiciled abroad or live in a different city. The social ties with other community members, for example their neighbours, were found to be weaker. The relationships that existed with fellow seniors, for example, at the CAL and other meeting points, were found not to extend beyond these meeting points. The strong family ties are explained by the Polish strong family tradition of togetherness. However, with the ever-tightening neo-liberal pressures that have seen younger members of the family move all over the world for economic reasons, seniors tend to be isolated from within their homes and localities. A combination of the ever-weakening family ties and weak social relations within their community would imply an even more acute isolation of seniors. Besides, in trying to establish the conditions or factors that influenced these social relations, it was evident that these were mainly individual choices, e.g. driven by self-esteem; in other cases, social relations of the investigated group depend on the activities that one has engage in at home; for example grandmothers take care of their grand-and/or great grandchildren. In other cases, it also depends on the weather (winter vs. summer) which has an implication on one's willingness to perform certain activities with others. All of these factors evidently influenced the seniors' ability to integrate with others.

Importantly, no initiatives were documented or mentioned that encouraged seniors to strengthen their relationships within their localities. Furthermore, the question of checking the participants' daily experiences of community was meant to establish the ease with which they accessed the different physical and social spaces within their community. The spaces that seemed important to the seniors by virtue of the fact that they were mentioned by nearly all the participants included shopping centres/places, medical facilities, housing facilities, and public transport. Seniors mentioned that they had had negative experiences with the long waits at the medical facilities, buildings with no lifts, dangerous and broken pavements in the streets, the dehumanizing language used by young people on public transport. All of the above were mentioned as hindrances to the free and easy access these spaces. However, it is important to note that, except for one male, the majority of the respondents were female, which may have had a strong bearing on the findings.

Lastly, as an aside to the highlighted synthesized findings, I suggest that the sense of community has to be strengthened considering all the emotional, psychological, physical benefits that come with it. Strengthening the local social relations and ties serves as a fallback position for seniors where family ties grow weaker by the generation. At the same time, these social relations or ties maintained at the local level do not replace the biological family, but rather serve as an extended

family that steps in in times of challenges. To this end, I propose that initiatives should emphasize sociality (exhibiting the social in all aspects of life) in the lives of seniors and serve to strengthen these ties. In addition, seniors forming and activating the social sector within their local economy comprise relational working groups that can give a unified voice to seniors within their locality (in this case, the district of Grochów), while also strengthening the social ties among them. I suggest moving the social transformation to the core of our consciousness becomes crucial to all these efforts if we are to make the best of the above suggestions. By social transformation, I mean sensitizing social workers to the social environment in our social interventions, and thus trying to strike a balance between our understanding of the individual and their social ties. Lastly, in optimizing the social and physical spaces, it is only fair that seniors are consulted on the establishment of such spaces considering that seniors are experts on their own lives, and as such they are better placed to explain their lived realities. In conclusion, strengthening the social ties, promoting mutual support and social participation, empowering seniors towards decision-making, and promoting the active construction of the self are the all-important components in not only promoting well-being but also making local communities more age-friendly (Whitman, 2013).

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## Streszczenie

### **Analiza doświadczeń osób starszych i konceptualizacja lokalności w celu promowania dobrostanu. Przykład Warszawy**

W tym projekcie badawczym przeanalizowano doświadczenia osób starszych i konceptualizację społeczności w celu promowania ich dobrostanu. Znaczenie tego badania polega na podkreśleniu znaczenia społeczności jako ważnego miejsca dla osób starszych w dla ich dobrostanu. Weryfikacji badawczej podlegało początkowe założenie, że społeczność z punktu widzenia wspólnego życia i pracy łączy się z interakcjami społecznymi, które tam się zdarzają, jeśli te interakcje są silne i ugruntowane. Nie tylko dają one osobom starszym poczucie przywiązania i przynależności do ich społeczności, ale także czynią je zdrowymi emocjonalnie, psychicznie, fizycznie i społecznie, stąd pojawia się ich dobre samopoczucie. Ostatecznym celem tego badania była analiza doświadczeń osób starszych i konceptualizacja terminu „społeczność lokalna” w celu promowania dobrobytu osób starszych i podkreślenia społeczności lokalnych jako ważnego miejsca dla osób starszych w procesie dobrego starzenia się.

**Słowa kluczowe:** osoby starsze, doświadczenia związane ze starzeniem się, dobrostan, społeczność przyjazna dla osób starszych, środowisko społeczne, przestrzeń publiczna i społeczna

## Towards Inclusion in Health and Social Assistance: Implications for Statutory Social Work Practice

### Abstract

The literature shows that different social work approaches have been used in health care to generate different user experiences. However, there is limited empirical data on the implications for its practice in promoting health. The present study examines the pathways and implications for statutory social work approaches in promoting child health and family wellbeing.

The provision of child and family allowance benefits and the integration of biopsychosocial model into health care planning, implementation, and evaluation through procedural, individualized, and progressive approaches seemed to characterize inclusive social work interventions and provided positive family health and social care experiences in Poland. However, at the system level, the limited coverage of benefits, policy inconsistencies, and poor family empowerment mechanisms emerged as challenges in enhancing inclusive health and social care. The difference in value bases between social work, on the one hand, and the social assistance system characterized by insufficient professional knowledge of health care issues, work overload and bureaucratic procedures, on the other, tended to affect health care delivery. Finally, family inabilities towards positive health seeking behaviors, including poor self-reliance, were some of the common problems.

This study demonstrates that the integration of the biopsychosocial model into welfare policy and social work practice could provide a solution to the challenges faced in promoting health. It is argued that effective health management can be attained if resources, global and local institutional and structural systems are mutually integrated with health care social work.

**Keywords:** health and social care, social work, wellbeing, intervention and biopsychosocial response

### Inclusion in health and social care

The world over, inclusive health and social care are important issues to both social work practice and policy. Human beings, especially children, require protection, care and nurture that meet their health, emotional, physical, and stable developmental

conditions (Mackenbach & Bakker, 2002). Therefore, some of the measures that social workers and agencies grapple with in promoting child health include making health care available, accessible and equitably distributed. To attain this status, some of the interventions involve securing individual and family support systems that promote a more equitable distribution of social and material resources; investing in building individual and family capacity to manage health; and addressing poverty as well as oppressive practices that counter the tendencies of technocratic approaches (Bywaters, 1996). Thus, promoting inclusive health and well-being is one of the contemporary universal justifications for family and individual contact with social work and social assistance benefits (Beddoe & Maidment, 2014). However, with the rapidly changing health and social care environment and the ever increasing poverty and inequalities, social work is at a crossroads. It is noted that professional practice is caught in the web of administrative congestion which implicates the delivery of inclusive health and social care.

### **The significance of promoting inclusive health and social care**

Trends indicate that risks in health and social care are widespread and gradually increasing. For instance, literature indicates that globally, “35,000 children die each day because of lack of access to health and life-saving technologies” (Briar-Lawson, 2001, p. 23). Others observe that this is exacerbated by poverty, which is measured by household living conditions ranging “from 4 percent in the Nordic to 20 percent in the United Kingdom and Italy” (Mackenbach and Bakker, 2002, p. 144). Despite several health and social reforms, increased funding, infrastructure and technologies, equitable access to and utilization of health and social services still remains a challenge for many children and families. In the worlds of increasing health and social vulnerabilities for children and families, rational thinking in policy and practice is a necessity (Beddoe and Maidment, 2014). Thus, the Polish policy and structural reforms that started in 1989 represent a major recognition of social work’s role in promoting equality in health and social care (Mayada et al., 1997). Intrigued by the profound engagement of social workers in promoting inclusive service delivery, this study considered investigating statutory social work approaches in promoting inclusive child health and family well-being. I wondered whether strategies of the capabilities approach (Sen, 1999) provide an opportunity to explain the endeavors in promoting equality in the access to health and social care. Therefore, the question I asked was: What are the practical implications for statutory social work in promoting inclusive health and social care for child and family well-being as evidenced by the Bielany Center for Social Assistance in Warsaw Poland?

## **Theoretical background and research context**

### **Polish context: country situation analysis**

Poland is the largest country in Central and Eastern Europe in both population and size, which sit at 38.1 million 312,685 km<sup>2</sup>, respectively (WHO/EOHSP, 2011). During the period of socialist regime, poverty<sup>1</sup> – though not ostensible – contributed to poor social cohesion (Staręga-Piasek et al., 2006). Thus, “Poland was a country of significant regional diversity during the time it was entering the transformation period” (Mayada et al., 1997, p. 187). In the 1990s, poverty was estimated at 20% and the risks of poverty were attributed to “individual or family circumstances, health status, age, disability, family size and behaviors” (Staręga-Piasek et al., 2006, p. 44). “Over the years, poverty profile indicators show a reduction, paradoxically; citizens are more dependent on state support than before the transformation in the 1990s” (Rutkowski, 1998, p. 48). Could dependency on state social assistance be a sign of reduced poverty or does it perpetuate poverty?

### **Policy and legal responses to health and social care**

Since 1989, Poland has followed a dichotomous universal-selective model of welfare composed of mandatory health insurance and social benefits (WHO/EOHSP, 2011). Hence, all citizens have equal rights of access to services that are financed from public funds. Approximately “18% of the GDP is allocated to social transfer programs through a system of income redistribution” (Staręga-Piasek et al., 2006, p. 45). The Polish social assistance policy reforms also address the issues of improving health care information, access to health and social care, and the organization and financing of health care services (Freytag-Leyer, 2011). At the international level, since Poland’s accession to the EU in 2004, the country has ratified the basic legal acts of the EU on social security. However, “while [the] EU supports member countries to provide high standard of health and social equity, its policy allows member countries to implement policies that are in tandem with their tradition” (Freytag-leyer, 2011: 43). As a result, the Polish management of health and social security follows a subsidiary model rooted in its Christian values and principles.

### **Social welfare and social assistance institutions**

Welfare institutions in Poland are composed of public authorities with autonomous bodies that have local responsibilities: *commune/gmina* is the lowest-tier autonomous

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<sup>1</sup> Poverty is understood as an indicator of risks related to material deficiencies and synonymous with social exclusion that influence the access to services, social welfare benefits, and the utilisation of health care and other services (Bywaters, 1996, p. 25).



body, followed by district/*powiat*, and province/*voivodship*. None of these structures have a national reach (Staręga-Piasek et al., 2006). Operating within these structures are social assistance centres (OPS), township social assistance centers (MOPS), and family assistance centers (PCPR). These bodies, whether independently or in partnership with other institutions, implement and coordinate the social assistance infrastructure. Social work is thus treated as an instrument of social welfare provision mandated by law (Mayada et al., 1997; Lynne, 2008). Social workers provide a set of system benefits for creating employment, individual support, services for senior citizens and other groups within the Polish territory (Staręga-Piasek et al., 2006; Rutkowski, 1998; Rymza, 2014). Therefore, social work is institutionalized, legally mandating citizens to receive state benefits (Mayada et al., 1997). As per the general perception, if there is to be professional relevance in health care, social workers need to reflect on the nature of their practice and build relevant knowledge as a reference in the ongoing debate on health and social care in the glocal (global and local) scenes.

### Theoretical perspective

In *Development as Freedom*, Sen (1999) used the Capabilities Approach (CA<sup>2</sup>) to suggest that freedom is synonymous with the opportunities that people have to extract value from their lives. Thus, the CA asserts that people have always existed in society alongside the resources used to satisfy human needs. Therefore, how resources and opportunities are used defines people's functioning and achievement (Tsaklogluo, 2005, p. 4). However, Tsaklogluo claims that the contexts that engulf the idea of human ability are connected to poverty and exclusion, where poverty implies poor conditions of life beyond resource-related and monetary conditions (2005, p. 5). Thus, addressing poverty as exemplified in the CA contains two functions which have *intrinsic* and *extrinsic* functions (Sen, 1999). The intrinsic function actualizes human freedom (Comim, 2008), while the extrinsic function empowers people to address inequalities and structural challenges. Thus, the basic capabilities lie in people's inclusion in developing the ability to claim basic human needs (Biggeri et al., 2011, p. 25). Hence, to struggle against inequality is the true problem of promoting inclusive service delivery. This study used the CA to identify the relevance of professional practice in promoting inclusive health in Polish regulatory texts. The above choice was cognizant of the fact that several approaches exist in addressing inequalities.

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<sup>2</sup> CA is used in this study to imply Capabilities Approach.

## **Methodology and research description**

### **Study objective**

This study investigated social work approaches in promoting health and social care for children and family well-being by examining contextual social work practice and operations in Polish legislation. The following questions were considered: (1) What type of welfare policies exist and what is their role in enhancing or inhibiting social work practice? (2) What approaches does social work use to promote inclusive access to services? (3) What are the experiences of parents with social work in promoting child health and family well-being? (4) How can social work deal with the realities of practice in promoting inclusive health and social care?

### **Data collection techniques**

Systematic data review was used to collect data based on large representative samples (Bryman, 2012). Electronic databases and libraries, such as the Education Research and Information Center (ERIC), academic articles, and corporate publications were also reviewed. Self-Administered Interviews were used to collect adequate and straightforward information on social assistance programs and policies, social work practice, the health and social care system, and collaboration in health care from a well-covered number of social workers and parents (Whittaker, 2009). In-depth interviews were based on one-on-one interaction with informants. Semi-structured interview techniques were used through a translator to gather data by engaging and probing informants to solicit their opinion and experiences.

### **Sampling and data generation**

Purposive sampling was used to select 8 parents and 9 social workers. The sampling was gender sensitive with social workers working with families either in family assistance or environmental assistance department being targeted. The social workers were identified by the Agency based on their availability while the parents were identified by social workers.

### **Data analysis**

The study used content and thematic analysis in which data was categorized into contextual and narrative using thematic methods (Creswell, 2013). This method involved extracting responses from the informants' interview transcripts and systematic reviews and generating themes on the context following three procedures in qualitative analysis (Creswell, 2013). Notes were generated and codes, categories, and themes were generated and cross-checked with the interview transcripts as seen in the table below.

**Table 1:** Table for data analysis

Streamed Codes	Classified Categories	Main Themes	
Code of administration procedures	Welfare policies and organization	Contextual social work as pathways to child health	
Child and family social assistance, care and support services			
Health care and mental health protection services			
Requirements for benefits allocation	Benefits Qualification		
Procedure for health and social assistance			
Power orientation and operational methods			
Child and family assessment	Procedural Approaches	Social work approaches and strategies as pathways	
Determination of eligibility for support			
Facilitation of support and coordination of services			
Psychosocial, physiotherapy and counseling	Individualized approaches (Pathological view)		
Vulnerability, disease and risk prevention			
Home and community-based care			
Sensitization			
Education and coaching on health and wellbeing issues	Progressive Approaches		
Social engagement			
Financial assistance to manage health services	Positive experiences of parents and family perceptions		Families and parents experiences with statutory social work approaches
Psychosocial, emotional and material support			
Health care negotiation and jobs search			
Capacity development and facilitation			
Home visitation			
Long wait for free benefits 'to see the doctor'	Barriers and gaps encountered by parents and families		
Limited, health and social benefits			
Limited time to see the social workers			
limited information on available benefits and access			
Need for training and more capacity building			

Source: George Sichone, May 2015

## **Informed consent and autonomy**

The involvement of the informants was voluntary—they were free to withdraw by giving notice to the researcher (Rubin and Babbie, 2011). A consent form and individual invitation letters were provided that detailed the purpose of the research and the description of the informants' involvement (Creswell, 2013). Additionally, the study avoided individual life events that triggered the risks of re-traumatizing them.

## **Study limitations**

In this research, communication barrier was a factor (Alston and Bowles, 2003). To address this problem, a research assistant was engaged to translate the questionnaire and interview to ensure inclusiveness. Furthermore, the culturally and socially different research environment provided the greatest challenges to the timely conduct of the study, and involved verifying the findings several times. Understanding the study topic, participant characteristics, and context was vital.

## **Results and findings of the research**

### **Introduction**

This section presents the study findings with a focus on social work practice in promoting inclusive health and social care for child and family wellbeing. The chapter is divided into three areas: context, social work practice, and discussion/implications for practice.

### **Participant demographic data**

In this study, I interviewed 17 respondents: 9 social workers and 8 parents. Of these, 6 social workers and 6 parents were interviewed using self-administered questionnaires, while 3 social workers and 2 parents were interviewed using structured in-depth interviews. Of all the informants, 3 were males and 14 females of age ranging from 28 to 51. The age range for parents was between 28 and 40 while for social workers it was from 30 to 51. Of the social workers interviewed, 1 respondent held a PhD in social policy and taught social policy and social work at the university level, while 5 held master's degrees in social work and 3 held master's degrees in social pedagogy. 8 of the social workers had been working for more than 12 years, and one staff had been working for 5 years. For the parents, 5 were employed, including 3 full-time and 2 part-time employees, while the other 3 were unemployed. It was indicated that all the parents who participated in the study had children or a family member with health or social difficulties.

**Research results: social work in statutory welfare:  
possibilities and challenges  
Considering policies and welfare organization as pathways**

The research answered the question: What types of welfare policies exist and what is their role in enhancing or inhibiting the promotion of child health and social care in Poland? In answering the question, social workers identified several legal provisions, such as the Code of Administrative Procedure, and the Acts on Child and Family protection and Support of 2004 and 2011. They also identified the Act on Counteracting Domestic Violence of 2014, and the Legislation on Health Care and Mental Health Protection of 1999, 2004 and 2009 (SWQ-S2)<sup>3</sup>. The study found that the point of departure in explaining health and social support extended to children and families bordered on the established regulatory texts. Social workers explained that “The code of administrative procedures defines the whole infrastructure of welfare assistance and its administration is based on the subsidiary model which has historical roots as laid down in the Act on Social Welfare of 1923 and reinstated in 2004” (SWI-1/2<sup>4</sup>, SWQ-S2). The collected secondary data established that this system was present at three levels of welfare administration which includes the local authorities (*gminas*), which is where the Bielany Center for Social Welfare belongs, as well as district (*powiats*) and regional (*voivodships*) structures (Mayada et al., 1997; Staręga-Piasek et al., 2006). However, the research findings showed that social work in local institutions carries the relevance of administering health and social services through policies. For example, it was stated that the Polish statute recognizes social work, simplifies its objectives, and defines the qualifications and responsibilities of social workers (SWQ-S2). Additionally, all children were entitled to receive free health care and mental health protection in an institutional setting. For instance, it is indicated that citizens, regardless of their financial circumstances, had the right to equal access to health services (Panteli and Sagan, 2011, p. 24).

However, not all is rosy in the local system. Social workers shared the challenges they faced in making health and social services available and accessible. With resentment, they argued:

The procedure for families to receive benefits was too long and sometimes the results were challenged by management or clients making the process longer and problematic. Even so, we are committed to addressing the needs of children and families and strive to meet targets as set by the Agency. (SWQ-S2/3 and SWI-1/2)

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<sup>3</sup> SWQ-S2 - questionnaire for social workers in section 2; others included SWQ-1, SWQ-3, SWQ-4.

<sup>4</sup> SWI - In-depth interview with social workers 1, 2, 3.

Could this be classified as managerialism? Unarguably, social workers form the basic principle of defining health and social needs as articulated in the policies (Evans, 2012). Thus, policy provisions referring to child health and poverty alleviation are handled through social work within or outside the institutions, together with partnering organizations. All in all, the available laws and administrative procedures were found to define the levels of inclusive approaches to family needs and poverty, while also guiding social workers in developing solutions.

### **Qualifying benefits emerges as a health and social care pathway**

The legal basis for the Polish health and social care is the dichotomous universal-selective model (Panteli and Sagan, 2011; Lynne, 2008). Therefore, it was essential to learn from social workers what families received the benefits (and how they received them). The responses revealed that the benefits granted consisted of cash and non-cash assistance in the form of permanent, temporal, and purpose-specific benefits.<sup>5</sup> The modicum of service provision was means-tested. For instance, social workers stated:

We provide non-cash benefits such as meals, referral to clothing stores, negotiating medical services, and job search. Cash benefits-wise, we support them financially and with purpose-specific benefits, such as psychotherapy, home- and community-based care, and rehabilitation services. (SWQ-S2, SWI-1/2 and PQ-S2)<sup>6</sup>

Therefore, health care eligibility follows the principle of “the haves and have not’s” requiring children and families to meet the pre-set minimum income criteria (Panteli and Sagan, 2011; Mayadas, 1997). Thus, orphanhood, homelessness, unemployment, disability, long-term illness, and other risk circumstances qualify families for benefits. Nonetheless, meeting the criteria is not an automatic passport to become eligible for benefits, as families were required to make formal applications for the services they needed.

Deep in the interpretation, power relations in benefits allocation were identified. For instance, parents stated, “For us, we neither have the knowledge on the services we can receive nor the influence to make decision about the benefits” (PI-1/2<sup>7</sup>). Among social workers, this attracted different answers: for some, their duty ends with conducting assessments according to standard tools in determining individual eligibility to health and social benefits (SWQ-2/3). Based on the guidelines,

<sup>5</sup> Purpose-specific financial benefit is an assistance granted to vulnerable families (defined in Art. 7 of the Social Welfare Act 2004) to satisfy essential human needs.

<sup>6</sup> PQ-S2 Questionnaire for parents in section 2. Others included PQ-1 in section 1, PQ-S3 in section 3, and PQ-S4 in section 4.

<sup>7</sup> PI-1 and 2 - In-depth interviews with parents (respondent 1 and 2).

families qualify to receive the available health and social services. The study also found that upon confirmation of benefits, social workers make follow-up calls to monitor families for any changes in household conditions where improvements result in the termination of benefits: for social workers, the assessment is determined by legal provisions. They agreed that, “depending on the identification of the health and social needs of the child, the assessment report is written and decisions made depending on the benefits available” (SWI-2/3).

Social workers discussed issues related to procedural fairness and substantive outcomes resulting from the assessment. Nonetheless, suffice to note that issues of procedural fairness and fair outcomes were worth mentioning, since the literature shows that assessments have been used to restrict benefit claimants (Holland, 2004), while leaving procedures loose, where “favoritism and unfair conduct would characterize the assessment and results” (Beckett, 2010, p. 36). However, in advancing health and social benefits to families, social workers stated, “In granting benefits, we always strictly follow the legal guidelines,” adding that “the regulations support us and give us the framework to determine the health and social benefit children and families receive” (SWQ-S 2, SWI-1).

Social workers admitted that the process of client assessment creates work overloads that make it difficult for them to meet their targets and those of their clients. In addition, for families that do not meet the criteria, professional judgment is needed to grant family benefits (SWI-1). For instance, “the health and social conditions of the children qualifies them for the award of benefits.” However, the assessment criteria usually do not capture the complexities presented by applicant families. “As professionals, our judgments look into the experiences, past, present and future of the children and families” (SWI-1). Consequently, two centers of power were established, with one based on the dictates of policies facilitated by social workers, and the other being social workers who conduct assessment and provided recommendations for benefits eligibility.

### **Statutory social work relevance to health and social care**

Different studies of street level bureaucracy, such as Lipsky (1980), stress that the organization of services is important in shaping policy practice. It is observed that welfare provision restricts support to ‘deserving’ groups with the aim of addressing vulnerabilities (Beddoe and Maidment, 2014). Equally, this study found that families at risk were prioritized for support. Thus, targeted support is an important element in changing systems from general to contextualized family needs (Uggerhoj and Mathies; 2014, and Payne, 2005). Therefore, setting standards for eligibility may be perceived as an appropriate measure for improving equality in health and family protection. To the contrary, when social workers were asked about how free they felt to practice as professionals, employer policy was vividly

mentioned. They reported that they were bound by the legal provisions in service delivery (SWQ-S2/3). It might be understood that “social workers knowledge and experiences qualifies them to make accurate judgments but were always caught in the web of varying forms of regulations” (Dziegielewski, 2003, p. 108). Critics argue that worker discretion erodes in the system of legal congestion (Lipsky, 1980). Sociological research also argues that the actual distribution of influence within statutory structures did not match the power of either the professionals or citizens whose power in the system was merely symbolic (Uggerhoj & Mathies, 2014; Lipsky, 1980). Change perspectives may classify this as managerialism which limits the *innovation* and *creativity* in managing health and social care (Zulu et al., 2015). In all fairness, this paper does not intend to construe the Polish subsidiary welfare as problematic; the idea is to understand how practice in these structures brings the life experiences of the workers and families to the fore.

### **Fostering coping mechanisms: health and social inclusion strategy**

At best, statutory social work inverts benign models of mass processing that authorizes practitioners to deal with welfare claimants fairly, appropriately, and successfully (Lipsky, 1980). In spiritual terms, attaining higher levels of health needs means that we are a step further away from darkness and a step closer towards light, and the same goes for addressing problems (Block, 2012, p. 96). Equally, releasing capabilities in individuals, groups, and institutions is a prerequisite to adaptability and accelerated coping conditions that engulf modern day health and social care problems (Bennis et al., 1985). The research found that social work with families is engaged in psychosocial support and counseling to gunner family confidence in managing health and help them to learn, initiate, manage, and maintain positive coping strategies. In this way, the role of health care social work is congruent with the goals of helping clients in problem-solving and coping with the stress that arises from ill health by either direct or indirect clinical, hospital, or public health and social contact. Additionally, the results showed that social workers assisted in educating families to obtain resources and services by providing advice and linkages to specialist care, rehabilitation, and family support. This process, known as “freezing and re-freezing” stipulates that secured inclusion should be strengthened and internalized to maintain a new way of approaching health behavior (Block, 2012). Thus, changing reality-oriented health patterns takes a form of problem solving were the production, distribution, and utilisation of services challenge the “social-technical” structures that perpetuate inequalities (Bennis et al., 1985). Consequently, it is asserted that linking individuals to health services and opportunities is synonymous with creating freedoms for families to acquire resources for the effective management of diseases (Sen, 1999; Comim et al., 2008).



### **Family empowerment in the lens of inclusive health and social care**

The general view among developmental practitioners is that families experience ill health because they are disempowered (Shapard, 2006). In confirmation of the above, family experiences in the Bielany district of Warsaw, Poland, showed that self-reliance through social activation, coaching, and general capacity development were the preferred inclusive models for enhancing well-being. Equally, social workers indicated that they provided education, coaching, and social activation as the measures to develop family capacities for self-reliance (Rivest & Moreau, 2014). The literature shows that this helps in addressing inherent inequalities in society that implicate health, as families are enabled to have the capacity to manage health (Bywaters, 2007; Shapard, 2006; Nussbaum, 2011; Comim et al., 2008). Nonetheless, the Polish welfare system was found unable to recognize that the individual lives in a society where the scramble for resources is high, and procedural approaches to assistance cannot overcome the challenges. In view of this, it is argued that empowerment should be an intervening goal for social workers in strengthening service users' inclusion in health management.

Without underdetermining the Polish system, however, it would be suggested that social work is an instrument of social justice were fairness is addressed through empowerment and personal growth (Rivest and Moreau, 2014). This is rooted in the belief that families are capable of changing their lives through life-affirming support that removes conditions that thwart their abilities (Bennis et al., 1985; Bigger et al., 2011). To the contrary, I begin from the acceptance that welfare services are engulfed in a professional and public policy ethical realm compounded by a hierarchical framework of service delivery, which resists change (Lipsky, 1980; Hugman, 2005). Arguably, modern practice is caught between the 'fighting elephants' of contemporary neo-liberalism, on the one hand, and human risks and needs, on the other (Beddoe and Maidment, 2014; Beck, 1992). These usually hold contradictory and conflicting interests between profit maximization and compassion in services provision (Hugman, 2005). Therefore, to suggest that empowerment is an ultimate solution in health and social care is to undermine the influence of the free market agenda in generating market failures on health services that implicate citizens' capacity to purchase services (Kozek 2006; Mackintosh and Koivusalo, 2005). However, this is not to blame the free market agenda per se, but to assess and reinvigorate scepticism among practitioners towards its repercussions for human risks and insecurities.

### **Joint-working for inclusive health and social care**

As attested in this study, joint-working is an important and emerging phenomenon in health and social care within Poland and beyond (Beddoe and Maidment, 2014; Panteli and Sagan, 2011). Research shows that at each stage of health negotiation,

people find systems confusing and frustrating especially information needs and procedures (Glasby and Dickinson, 2009). For example, it was established that families were disappointed with the health care systems that they found they found procedural and difficult to manage. Thus, to ensure comprehensive packages that address the needs of service users, social workers should have the muscle and knowledge of leadership, financing, and the mandate of each member in service delivery.

In the Polish welfare system, joint-working in social work was found to be present in three phases which include: case-by-case collaboration, in which practitioners from different agencies and professions shared and participated in the design, implementation, and evaluation of health and social care services through communities of practice (Dziegielewski, 2003, p. 84). Emphasis was placed on individualized plans and interventions to enhance users' ability to negotiate treatment. Another phase was that of professional and agency consultation, in which social workers did consultative work with medical staff, psychologists, and clients to determine the possible intervention measures (Bywaters & McLeod, 1996; Rymysza, 2014). Lastly, the team work approach was identified in relation to coaching, mentoring, and training, where specialist services were shared as part of professional involvement in joint-working (Dziegielewski, 2003: 84). Thus, collaboration was found to be diverse. On paper, this sounds professionally rewarding. However, one wonders about its relevance to globalized practice and specific problems. The answers lie in the interconnectedness of health and diseases, especially among children in the ever dynamically changing health care environment that calls for innovation in human resource, financing, and practice (Zulu et al., 2015; Gehlert and Browne, 2006). Similarly, changes are taking place in the structures, professional responsibilities, and roles of different stakeholders in health systems making the global and local institutional arrangements complex and fluid, thereby opening up avenues for joint-working (Walker and Crawford, 2008; McLeod and Bywaters, 2002). Could joint working be an answer to enhancing weak referral systems and loosened patient follow-up?

**Implications and recommendations for social work practice:  
mutual support for health and social care  
Cost-effectiveness 'versus' professional and human needs**

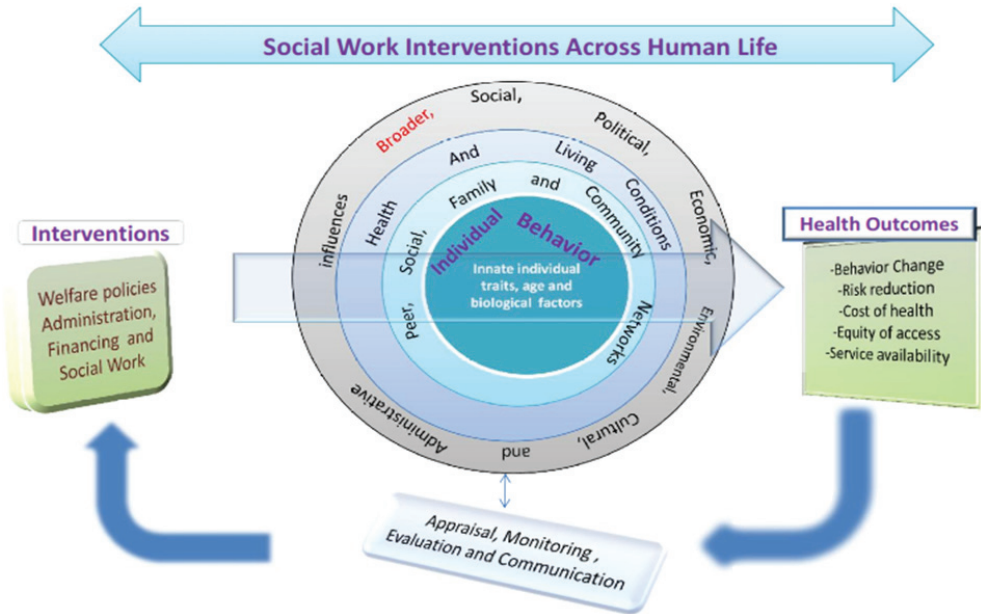
Welfare programs can be inclusive if they adopt interventions that are cost-effective "human and material" and utilize innovative approaches that provide results (Zulu, 2015). Research conducted in New-Zealand and the United Kingdom has also shown that social work can attain high level impact in health and social care at a lower cost (McLeod, 2002; Beddoe and Maidment, 2014). Equally, the Polish welfare belief, rooted in religious values, aims to address the health gap through resource redistribution (Rutkowski, 1998; Esping-Andersen, 1990). This justifies the targeting of

marginalized groups in welfare activities. From the vantage point of Mayada et al. (1997), social work practice in health reflects the availability of resources which are equalized through redistribution (Dickens, 2010). In view of the above, I argue that the mutual support between welfare schemes and policies of reducing costs in redistribution and professional/user demands of addressing human needs creates an advantage in expanding the influence of serving the needs of the “deserving poor.” Conversely, targeting for benefits is associated with the cost of services and decisions made based on income criteria (Esping-Andersen, 1990). For instance, although social work draws its ideas of practice from other disciplines, I found targeting for benefits to shape social practice through the use of economic language. This changes the perceptions of social policy and welfare programs (Bennis et al., 1985). Furthermore, services are standardized and channeled into administrative procedures with strict ways of reporting on health and social problems (Harris, 2011; and Holland, 2004). Consequently, social work methods are adjusted in line with regulatory responsibilities to attain inclusion (Hugman, 2005; Beddoe and Maidment, 2014). As such, professional power is constrained and change is needed for structural and professional innovation that responds to human needs in health care (Zulu et al., 2015). Hitherto, I deduce that to attain positive inclusive health and social care, mutual support is needed between maximizing resource usage and using sustainable professional approaches in addressing human health and social needs.

### **Managing difference: social work mandate and welfare systems**

At the local and international scene, although social work is going through turbulent times, it can emerge as a solution to health and social care if its practice is amalgamated with structural arrangements. It is observed that this is in line with most welfare programs and social work values that reflect the national and international health agenda of creating a suitable environment for individuals to enjoy health (McLeod and Bywaters, 2002). Scholars argued that this is an opportunity to uplift many excluded and marginalized groups from ill health (Beddoe and Maidment, 2014). Therefore, social work practice covers a range of intervention across human life as in the diagram below:

Nonetheless, two elements implicate social work: the conflict with both its own goals of emancipating humanity from risks, and the existing societal base of assistance (Hugman, 2005). Firstly, social workers digress from the agenda of promoting social change, cohesion, and liberation in implementing the tasks of benefits redistribution that are business as usual and unresponsive to family empowerment that enhance inclusion (Starega-Piasek et al., 2006). Secondly, professional training is not in tandem with the core value of the Polish society in health care, in which most professionals find it difficult to interpret health care work. More fundamental is the evidence that social work training takes little effort to orient practitioners in



Source: George Sichone, June, 2015

health care and policy issues. I argue, therefore, that with high levels of unemployment, disease, and economic problems, pressure is placed on service redistribution and social work identity, as the profession gets lost between the demands of their theoretical and practical training, and the actual welfare arrangements. Hence, as social workers emphasize procedural work that supports building welfare schemes, they should not only fulfill policy demands but endeavor to make practice relevant to the profession and citizens in promoting inclusive health and well-being.

### Health care social work and global practice: an interface

Unarguably, we live in an ideologically changing world where the influence of the new social, economic, political, and cultural order translates into health outcomes (Beddoe and Maidment, 2014). For instance, many countries in the global South and North are caught in the web of free market policies which form the backdrop of welfare reforms and lead to cuts in health and social spending (Panteli and Sagan, 2011). Academic arguments have shown that health is connected to global systems, in which the social determinants of health are embedded within global influences (WHO, 2010; Bywaters, 2007). As found in this study, social work implications in promoting inclusive health are similar in nature and range from the changing global traits to structural, financial, human resource, values, and cultural differences. As such, professionals and nations should thus blend practice with global developments with the view of integrating systems, values, and cultural influences

that implicate practice in health (Glasby and Dickinson, 2009). In my perception, which overlaps with the generally held view, the increasing internationalisation of social work education contributes to the diffusion of new knowledge and a greater globality in social practice and research (Bennis et al., 1985). Therefore, as social workers endeavor to understand health within the glocal context, they should observe that there is a complementarity between the global agenda on equality in health, on the one hand, and the indigenous models of health knowledge, education, policy, and practice, on the other.

### **Developing strategic alliances for health care**

Inclusive health and family-centered care is the core reason in collaborative practice with decisions made between user needs, professional and policy demands (McLeod and Bywaters, 2002; Beddoe and Maidment, 2014). In Poland, joint-working was found to be a task of social workers alone, who negotiate specialist health care and treatment for users and simultaneously intervene in family violence and social activation (Dominelli, 2002). Users and other stakeholders were not very much engaged in decisions about care, apart from health staff. This could be the reason why social workers faced resistance from users to comply with assessments and some decisions on welfare. In this way, joint-working introduces new knowledge and practice skills with the understanding that inclusive health and social care are interdependent (Briar-Lawson, 2001). Therefore, using structural and policy support that emphasizes collaboration in welfare administration, social work has the opportunity to develop the potential of integrating various health and social needs for users in a contextual way (Uggerhoj and Mathies, 2014). This suggests that through collaboration social work can provide moral direction to service delivery and help bridge the unequal difference between individuals and society. Could it be argued that social work is political? Nonetheless, varying partner agendas not only implicate practice but also inequality in health and social care dispensed to different interest groups (Watson and West, 2006). However, this is not to suggest that social workers are not doing anything to form alliances as it has been seen that they work in integrating users and interdisciplinary teams in health care, which is cardinal. Fundamentally, however, social workers should recognize the values and ethics of the profession; consider users' voices; and recognize the interdependency and expertise of their colleagues and other stakeholders to promote inclusive health and social care for service users.

### **Recommendations**

In addition to the overarching agenda of providing support to children and families, it is recommended that social workers should adopt and adapt to the recognition of health as a social work issue, as enshrined in the IFSW constitution on health.

In Poland, health care was found to be a preserve of a policy in which professionals implement policy prescriptions without their professional discretion in the protocol for access to care. Therefore, in adopting the IFSW constitution, professionals should be aware of their health and social mandate based on evidence from the international and local scene.

It is recommended that learning institutions (universities, colleges and other schools of social work, pedagogy and community work) should develop and teach syllabi on health care and clinical social work including its practicum. In Poland, indicators showed that social workers were limited in their use of the health care vocabulary and terminologies. Staff admitted that the curriculum they followed did not orient them in health care as a social work issues. This calls for institutions of learning to be resourceful, e.g. by forming educational platforms that bring together academicians, practitioners, and students in pooling their joint resources.

It is recommended that the use and application of biopsychosocial models in health and social care should be institutionalized and integrated into policy and practice. For example, health care policy should respond to issues of user self-reliance through increased coaching, training, and social activation. In welfare reforms, health should not only be defined as medical issues but it should also include emotional, psychosocial, and financial conditions as mirrored in the global agenda on health. For accelerated and effective health and social care, it is recommended that professionals should focus on developing user-worker dialogue through participation, in order to help develop user potential in managing health and social needs. One of the key measures in this regard is to improve user adaptability and knowledge in the health care-seeking environment through their participation (Sichone et al., 2012).

## Conclusions

The study established that the Polish universal health and social care model was important to social work practice in supporting the attainment health and social participation of vulnerable families and other citizens in a structural way. Fundamentally, though the opportunities provided to families by accessible and affordable child and family care are contingent on the application for benefits and assessment, they help families' access care and address health and social vulnerabilities. On the other hand, the decentralized system of social assistance practiced in Poland is a step ahead in recognizing the special needs of all citizens inclusive of vulnerable groups. This was found to have far-reaching implications for social work practice in that social services recognize the dominant belief that social problems are contextual taking the shape of individuals, communities and systems. As such, in subsidiary institutions where professionals and institutions have powers over the content of benefits, enforcing compliance among citizens constitutes the violation of individual power and judgment over the choice of services. More so, limited services that families

receive, coupled with a high cost of living, and the cost of health and social services over and above policy and service inconsistencies, imply that welfare schemes play a limited role as instruments of social inclusion and disease becomes synonymous with powerlessness, beyond any other compensation. This is not to denounce the means-tested universal-selective system of benefit allocation, but instead review its relevance in improving child and family health in specific and citizens' choice and satisfaction of welfare assistance in general.

### Areas for recommended further research

Further research should be instituted to establish the gap between welfare benefits received by children and families and their cost of living. This is important in ascertaining the levels of health and social care availability, accessibility and equity of access. Another finding is the influence of regulations on social work practice aimed at enhancing health and social care. Further research is needed to establish the role of social work in health care and how regulations shape practice and the ways in which users and citizens perceive social work. Still more fundamental is the evidence required to understand the relationship between the value base of social work practice and education, and that of welfare systems in Poland and globally.

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## Streszczenie

### W kierunku inkluzji w opiece zdrowotnej i pomocy społecznej: konsekwencje dla praktyki pracy socjalnej

Literatura przedmiotu pokazuje, że w opiece zdrowotnej stosowane są różne podejścia do pracy socjalnej w celu uzyskania informacji o doświadczeniach użytkowników usług socjalnych. Jednak istnieją ograniczone dane empiryczne na temat konsekwencji dla praktyki w promowaniu zdrowia. W niniejszym badaniu zbadano konsekwencje dla ustawowych podejść do pracy socjalnej w promowaniu zdrowia dzieci i dobrostanu rodziny.

Wydawanie zasiłków na dzieci i świadczenia rodzinne oraz integracja modelu biopsychospołecznego z planowaniem, wdrażaniem i oceną opieki zdrowotnej poprzez procedury, zindywidualizowane i progresywne podejście wydawało się charakteryzować integracyjne interwencje w pracy socjalnej i zapewniało pozytywne doświadczenia w zakresie zdrowia rodziny i opieki społecznej w Polsce. Jednak z poziomu systemu ograniczone zakres świadczeń, niespójność polityki i słabe mechanizmy upodmiotowienia rodziny pojawiły się jako wyzwania w zakresie poprawy opieki zdrowotnej i społecznej sprzyjającej włączeniu społecznemu. Różnica w podstawach wartości między pracą socjalną a systemem opieki społecznej, która charakteryzowała się niewystarczającą wiedzą zawodową pracowników socjalnych na temat zagadnień związanych z opieką zdrowotną, przeciążeniem pracą i procedurami biurokratycznymi, zwykle wpływała na świadczenia opieki zdrowotnej. Wreszcie ogólne problemy rodziny stanowiły o jej niezdolności do pozytywnych zachowań prozdrowotnych, w tym słaba samodzielność.

W tym badaniu zostało wykazane, że integracja modelu biopsychospołecznego z polityką opieki społecznej i praktyką pracy socjalnej może stanowić rozwiązanie problemów związanych z promocją zdrowia. Autor argumentuje, że skuteczne zarządzanie zdrowiem można osiągnąć, jeżeli zasoby, globalne i lokalne systemy instytucjonalne i strukturalne zostaną wzajemnie zintegrowane z pracą socjalną opieki zdrowotnej.

**Słowa kluczowe:** zdrowie i opieka społeczna, praca socjalna, dobrobyt, interwencja i odpowiedź biopsychospołeczna

## Part Three

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### **Social Work Practice Beyond the Traditional Frames**



## Social Activism in Transition: Why Activists Resign from Working and Volunteering in the Third Sector<sup>1</sup>

There is no singular activist response or form of organizing. There is no ideal scale, no ideal mode or working, nor ideal activist.

Richard J. White, Patricia Burke Wood<sup>2</sup>

### Abstract

Social work professionals are engaged in long-standing partnerships with NGOs in addressing the needs of people at risk of exclusion, as well as prevention and development of community capacity. The aim of this paper is to provide a qualitative analysis of the reasons behind the termination of voluntary and paid jobs done by volunteers and workers of non-profit organizations. The research discloses a phenomenon described as a 'social activism in transition,' which should be taken into account by helping professions. The analysis is based on two research periods: 2016–2017 and 2018–2019, when 18 semi-structured interviews were conducted among former volunteers and workers of non-governmental organizations in Warsaw. The chapter includes a critical literature review, description of the research methodology and conclusions that have emerged from the study, as well as some ethical concerns of qualitative research on civil society. The results showed that most of the researched non-profit organizations struggle with a plethora of problems and obstacles related to managerial, financial, and relational aspects. The majority of the interviewed former workers and volunteers strove to situate voluntary and paid work in NGOs between legally framed, highly

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Although various names are used to refer to *organized philanthropy*, including: third sector, non-profit organizations, non-governmental organizations, voluntary organizations, charitable organizations etc., depending on the cultural and political context (cf. Gies, Ott, Shafritz, 1990), I knowingly and intentionally decided to use all terms synonymously in the text. I am fully aware of the theoretical and practical simplification applied in order to make the article clear. This definitional issue is thoroughly discussed in the following texts: Frączak, Skrzypiec 2011; Evers, Laville 2004.

<sup>2</sup> White, R. J., Wood, P. B. (2016). Guest editorial. *International Journal of Sociology and Social Policy*, 36 (9/10), 570–577.

formalized activity attached to growing business standards, on the one hand, and unrestrained, mission-based acts of kindness and empathy, on the other.

**Keywords:** non-profit organizations, third sector, grassroots initiatives, social activism in Poland

## Introduction

Both in the case of Polish and international literature, there has been a limited amount of research on non-governmental management and the reasons for resigning from voluntary and paid work in non-profit organizations (Studer and von Schnurbein, 2013; Einolf, 2018). Both qualitative and quantitative research is mainly focused on volunteers' and workers' motivation to start cooperation with the non-profit sector as well as the positive sides of such involvement (Musick and Wilson, 2008; Korczyński, 2010; Gawroński, 1999; Górecki, 2010, 2013; Matuszewska, 2010; Naumiuk, 2003; Koralewicz and Malewska-Peyre, 1998; Esmond, Dunlop 2004). However, there is a shortage of publications concerning the obstacles and misunderstandings resulting from increasingly formalized, non-personal, uniform voluntary and paid work in the third sector in Poland. As of yet, the critical moment of leaving the non-profit sector remains underresearched.

In order to fill in the gaps in our knowledge, I proposed a qualitative contribution to the discussion on volunteers' and workers' withdrawal from non-governmental engagement. Obviously, in the case of a research study based on interviews with people from a small segment of the non-governmental universe, it is impossible to extrapolate its results onto the broader population of volunteers. Nevertheless, most findings are intriguingly coherent with both practical guides (Brudney, 2012; Kukowska, 2015; Rehnborg, 2009; Rustecki, 2014), and representative research on non-profit management.

The aim of the research was twofold. Firstly, to disclose subjectively defined reasons and sociopsychological consequences behind former volunteers and workers of non-profit organizations' decisions of terminating job/voluntary work in the third sector. Secondly, to explore whether non-profit organizations in Poland seek balance between the tendency towards professionalization and the bottom-up character of the work (cf. Dudkiewicz, 2009; Gliński, 2006; Goszczyński, Kamiński and Knieć, 2013; Górnica, 2014; Iłowiecka-Tańska, 2011; Smith, 2005; Załęski, 2012). The chapter is also intended as a contribution to the critique of the way of thinking about the third sector in contemporary, democratic Poland (cf. *Trzeci Sektor: fasady i realia* 2012, pp. 249–250).

## Methodology

The analysis is based on two research periods: 2016-2017 and 2018-2019, when interviews, desk research, and numerous formal and informal conversations with representatives of various non-governmental organizations,<sup>3</sup> media, local authorities, and the academia, including (former) volunteers, coordinators, managers, lecturers, activists—both practitioners and theorists—were conducted.

The semi-structured interview covered a total of 18 respondents. The research aims to show the perspective of both former volunteers and paid workers in non-profit organizations. Therefore, 11 volunteers and 7 employees were interviewed, accounting for the inside reality of 18 non-governmental organizations. Most of the respondents were experienced volunteers and workers with a minimum of one prior voluntary or paid experience in cooperation with a non-profit organization.

Interviewees were recruited through an online search of websites, groups, social networks and databases devoted to the third sector, as well as through snowball sampling. All of the respondents agreed to have their respective interviews recorded, and none of them were paid for taking part in the research.

All interviewees had cooperated with relatively large-sized, long-lived NGOs (Charycka and Gumkowska, 2019) based in Poland's capital city, Warsaw. The aim was to show a particular segment of urban non-profit organizations which, thanks to their longevity, human and financial resources, and well-developed internal, institutional policies could potentially be set as an example for the less stable, short-lived, emerging NGOs.

The methodological approach used in this research is based on qualitative research, with the intention to analyze individual stories of people formerly involved in the third sector activity. Qualitative research enables the problematic moments and meanings in individuals' lives to be described (Denzin and Lincoln, 2005, pp. 2–4). It is also of specific relevance to the research of social relations.

In order to provide more adequate conclusions on the present condition of voluntary work, the causes of the former volunteers' and workers' resignations were analyzed in terms of their expectations, motivation, conflicts and predicaments related to their cooperation with non-profit organizations, as well as in the context of their trajectories of life and the coordinators' leadership. Nevertheless, the chapter focuses mainly on the process of leaving the third sector and various strategies to channel individual needs to work for the public good, i.e. the aforementioned 'social activism in transition.'

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<sup>3</sup> The research is mostly based on the cases of foundations and associations, known as the "core" of the strict sense of the term "non-governmental sector" (cf. Herbst, Przewłocka, 2011, p. 7). Due to the prevalence of the two terms "non-governmental organizations" and "third sector" in Polish literature, media and public discourse, I have also decided to use them in the majority of cases in the article.

The multi-paradigm approach is applied in the research. The present survey is embedded in two paradigms: sociological constructivism and pragmatism. A social constructivist approach recognizes that meaning is constructed by the people who are engaged in the interpretation of their world (Crotty, 1998). It places emphasis on socially contracted knowledge and norms, which are constructed and re-constructed in the process of gaining experience (Gibbs 2007; Rapley, 2010; Górecki, 2013). Pragmatism, on the other hand, focuses on practical efficiency and problem solving (Creswell, 2013). In the analysis, special prominence was given to lessons from concrete experience, which can provide guidelines for optimal development of social participation in the third sector. On the one hand, both paradigms enabled me to follow, facilitate, and review the socializing profile of social participation as presented and reflected by the interviewees on the other, they are concentrated on the message from particular experiences and practical advice for the third sector management.

Due to the aims of the research and the selected research problem, the option of semi-structured interviewing was the most viable technique (Merriam, 1998). An interview guide contained several open-ended questions. This technique enabled the gathering of sensitive qualitative data, insufficiently presented in the literature on non-profit organizations and civil society, as such interviews “are effective for gaining an insight into problems that are not immediately perceptible but that nonetheless cause concern in certain areas or in certain segments of the population” (Laforest, 2009, p.1).

Two types of sampling method were used, snowball sampling and purposive sampling (Marshall, 2008). In order to include a variety of activists, representing diverse social institutions and ideologies, I followed the principles of heterogeneity sampling. Taking the primacy effect into account, activists who had decided to withdraw from the third sector no earlier than 3 years before the conducted interviews were selected.

Due to the sensitivity of the problems raised in the interviews, not only personal data is concealed (each respondent is given the core – “R1”, “R2”, etc.), but so is the detailed information about particular organizations, such as the scope of their activity, mission, characteristics, etc.

## **Results of the research**

The analysis revealed particular ways of the perception of resigning from third sector activity, an inconsistency of the expectations towards and the inside reality of NGOs as perceived by former workers and volunteers, managerial and financial irregularities, as well as conflict situations at the individual and institutional level. An analysis of the narratives and the abundant literature on the subject allows a set of recommendations for non-profit organizations to be formulated.

### Resignation from being active in an NGO

It is crucial to note that eight out of eleven interviewed volunteers shared a particular understanding of their reason for quitting volunteering—they simply did not agree to continue their voluntary service after the termination of the volunteer’s contract. Therefore, only in three cases did the volunteers suddenly go out of the organizations’ sight or gradually reduced their involvement until the cessation of their voluntary activity. One case was unique since the termination of the volunteer’s contract coincided with the closure of the organization: “I had fulfilled my volunteer’s contract (...), so I was quits with the organization. My leaving could be understood in a way that the organization had stopped functioning, so I left by necessity (...), not with a feeling that I left but that something was taken away from me” (R7).

A similar tendency can be seen among former workers, although only two of them refused to extend their contract. Most workers had given their notice either due to long-lasting concerns or as a reaction to new circumstances.

In the cases in which volunteers refused to sign a new (voluntary or job) contract upon completing a project, “not owing” anything to the organization was the main sign of a feeling of responsibility that made several respondents unable and unwilling to cease cooperation, even though it was not satisfactory for a relatively long time. Long-lasting decision-making processes were generally linked to the sense of belonging and difficulty in leaving the organization. As one of the people admitted, “It took me such a long time to resign because I was emotionally connected to the organization (...), a lot of people associated me with that organization” (R12).

Due to a wide spectrum of cases I decided to categorize the various above-mentioned forms of leaving the organizations into:

- external factors (when there was no possibility of prolonging the cooperation due to the closure of an NGO, dismissal, or the end of a project),
- discontinuity (in case of individual’s disagreement to continue cooperation in the face of organization’s offer), and
- self-closure (when cooperation was ceased on the initiative of the volunteer/worker).

Each category was divided according to the duration of the process (rapid moment of leaving versus long process of leaving). The results are presented in Table 1.

**Table 1.** Forms of resignation from volunteering and paid work in the non-profit sector

Category name/duration	External factors	Discontinuity	Self-closure
Rapid moment of leaving	2 people (R7, R13)	3 people (R1, R5, R18)	3 people (R6, R10, R15)
Long process of leaving	no one	5 people (R2, R3, R9, R11, R16)	5 people (R4, R8, R12, R14, R17)
Total	2	8	8

## **Volunteers' perspective**

### **Former volunteers: reasons for resignation**

Former volunteers' narratives provide two-sided reflections: on institutional problems in specific non-governmental organizations, and (in the form of recommendations) on how to manage volunteering while respecting volunteers' needs and expectations.

In light of the psychological contract theory (Stirling et al., 2011) in volunteer management, it is crucial for volunteers to have their emotional and relational need met. From this perspective volunteers need "appreciation and a caring management approach" that could be constrained by "limited in autocratic and bureaucratic interactions" (Stirling et al., 2011, p. 324). Therefore, if non-governmental organizations transform into more professionalized and bureaucratic institutions, volunteers (as the analysis shows) can lack personal support, recognition, and connection; volunteers may feel that their psychological contract to receive care, connection, and support is being violated, which may cause a lack of sense of belonging and feeling needed, give rise to frustration and, eventually, sway them towards quitting volunteering. However, the fulfillment of personal motives does not necessarily mean that it is less likely for volunteers to leave the organization since other contextual factors might also impact the process (Gagné, 2003; Ross et al., 1999; Grube and Piliavin, 2000; Yanay and Yanay 2008).

The next part of the chapter is devoted to various factors (both personal and institutional) that cause volunteers' resignation as perceived by former volunteers themselves.

### **New commitments**

Seven out of eleven volunteers listed making a new commitment (starting a full-time job and/or studies) as one of the causes for resigning from volunteering. However, only in two cases was this new commitment the only reason behind their decision. Those volunteers were fully satisfied with their voluntary service and wished to come back one day, in case of the emergence of a new life situation and spare time. From the narratives of other volunteers, it is visible that undertaking new duties was of secondary importance.

Two volunteers admitted that after landing a full-time job, "volunteering was set aside" (R3, R10). Therefore, *time* was commonly raised as the clichéd, easy justification for ceasing to volunteer in an environment that was not fully gratifying. One of the former volunteers admitted that she did not want to continue a cooperation that might not contribute anything more to her life and therefore, it was better to focus on "daily routines and work" (R2) because there was no guarantee that the voluntary service would provide the agency, decisiveness, and flexibility she



had been missing so far. Another person admitted that she felt overqualified to continue volunteering on the same terms. After years of commitment she wished to change her role. She decided to develop her (teaching) skills through a paid job and PhD studies instead of volunteering (R3). Despite her overall satisfaction from the volunteering, she felt it was “time [for her] to move on.”

One of the interviewees enumerated several reasons that led her to stop volunteering: “I started a new job (...) and this, unfortunately, entrapped me” (R4). Nevertheless, she also admitted that the strong feeling of not being needed, lack of contact with the association and the foreign person she was mentoring, all lead to the gradual cessation of her involvement. She was truly disappointed because she was told at the beginning that she should commit herself fully until the end of the project, but after a few months neither the organization nor the person she was about to help, kept in touch with her (R4). The former volunteer added that, even though she appreciates volunteering itself as it gratifies both sides involved with positive emotions, she stopped her voluntary involvement in the particular NGO because of her concern: “I am a bit worried that they remember me from that [last] activity (...) and that they blame me for that” (R4).

Another former volunteer confessed that after a radically intensive period of volunteering (“I was on duty five times a week, additionally handling five hundred e-mails per week, so I devoted so much [of my] time (...). Sometimes I wouldn't slept all night” (R9)), she could no longer volunteer. According to her, volunteering in the organization (even though important and satisfying) was unfairly organized (“the conditions were presented [to us], but nobody honored the terms of our agreement” (R9)), which resulted in an excessive voluntary workload. Her reflections led her to conclude that volunteers were recruited instead of paid workers, especially given the fact that the specificity of the institution was related to the fact that “working there irregularly, (...) once a week, (...) would not make sense” (R9).

### **Relationships, hierarchy and communication**

Despite new commitments in life, most of the former volunteers pointed out the need to reformulate volunteering in the organizations they used to serve in. One of the survey participants conceded that the reasons for not prolonging her volunteering experience were as follows: a lot of “unspoken grudges, (...) organizational shortcomings, the main coordinator who was occasionally unpleasant (...)” (R1). Moreover, she mentioned the situation during her visit at the organization, but there was nothing she could do despite prior arrangements and a visible division between volunteers and paid workers. As she said: “it is not such an open group (...). [Being a volunteer there] you feel that you are a separate and temporary being” (R1). The issue of the relationships within the organization was also raised by another interviewee, who claimed that, “even though I liked volunteering a lot,

I felt that I was not closely associated (...). I did not feel an emotional bond, an attachment, [a conviction] that I was an important part of the organization” (R5).

One of the described organizations has gone through “a multi-faceted conflict (...) and several peculiar situations related to the problem of transferring intimate and private relationships to work” (R7). A complex, long-term, ideological and work-related conflict between the main team members lead to the gradual closure of the organization. “The process (...) lasted a year or a year and a half before it all ended, so I felt frustrated and (...) couldn’t understand why (...) the organization died after the conflict,” stated R7. The internal conflict prevented any possibility of joint efforts to ‘fight’ for the organization’s future, including financial security.

One of the most ‘extreme’ cases of internal problems was presented by a volunteer who had cooperated with a non-profit organization promoting social inclusion and equality. The institution had a set strategy of volunteers’ management: firstly, each volunteer took part in several professional workshops and then tried various activities within the organization during his/her trial period. According to the former volunteer, “all workshops were very professional and useful,” but afterwards she could not find herself in the organization. For her, the “three-month trial period of staring over my shoulder (...) was truly demotivating. (...) I had no agency, no control over what I was doing. It made me very frustrated (...) to the point that I decided to quit” (R8). Not only the feeling that “you are not needed, you are a third wheel (...), procedures were created to discourage potential volunteers” but also that of “exclusion and mistrust towards newcomers” (R8) and a lack of any positive contact with workers led to her resignation. Her attempts to suggest some improvements in the organization where ignored: “there was no real space for any changes because of the very conservative and strict frameworks inside the organization” (R8). As she mentioned, a strong feeling of a huge double standard in the ostensibly anti-discriminatory, pro-equality organization was ubiquitous and unacceptable to her. The whole experience was a “cognitive paradox” for her, leading to a sense of injustice. As bluntly summarized by the volunteer: “I could not find my footing in that organization, and I decided that I didn’t want to be a part of something so hermetic and full of hypocrisy and duplicity” (R8).

The last case concerned a long-term, very experienced former volunteer who also served as a member of the board in a non-profit organization. After over three years of full commitment, she realized that “despite the good will, the organization creates a bubble (...) and does not really provide help” (R11). The bubble was twofold: it involved a disconnect between the NGO and other non-profit organizations in Poland, as well as addressing activities to a relatively hermetic, affluent group of youth. The volunteer pointed out that her resignation was triggered by a “misunderstanding over what the organization is meant to be, and favoring private interests over organizational good (...), [as well as] personal conflicts, dishonesty, accusations” (R11). She felt growing frustration and exhaustion due to the

lack of strategic planning and thinking, as well as an inability to implement ideas and changes aimed to improve the operation of the NGO. She had been thinking about her resignation for several months, having a difficult time informing others and letting herself go after years of sacrifice and involvement. She was aware of the variety of personal benefits she derived from volunteering (learning new skills, networking, shaping a world view) and her “heart was with the organization,” but she could no longer find a common ground and a space for discussion about the future of the organization.

On a similar note, various research has shown the impact of positive, strong bonds with the organization on one’s sense of obligation and one’s need to contribute more time and continue volunteering (Huynh et al., 2012; Dwyer et al., 2013; Farmer and Fedor, 2001). Therefore, the stories of the interviewees are emblematic in the context of the crucial meaning of supportive relationships in the non-profit organizations, where volunteers are involved. The sense of belonging and friendly interaction can lead to a stronger satisfaction and internalization of the organization’s values and mission (cf. Hyde et al., 2016; Hustinx and Handy, 2009).

### **Suggestions and proposals for changes in selected NGOs**

In order to indirectly empower and give a voice to the interviewees who had their personal experience in particular NGOs, almost every interview concluded with an open-ended question about the possible solutions to the problems occurring in the organizations and the proposed changes that could improve the functioning of the said institutions. The former volunteers and workers provided excessive, detailed recommendations. Their thoughtfulness, along with a reflective and critical approach based on various social involvements, resulted in meaningful, relevant conclusions.

### **Terms and conditions**

Three former volunteers mentioned the importance of clearly stated and coherent terms and conditions of volunteering. All of them compared volunteering management to general rules of Human Resources Management in the labor market. As my second interlocutor stated,

When you are coming for the job interview, you are presented with all the terms and conditions (...). While in volunteering (...) you come and realize that the offer is different [than in the advert or previous conversation], but they immediately give you a volunteer’s contract to sign, so you feel the pressure (...). There is not time for a volunteer to think about it. This is my most common experience. (R2)

Another person also addressed the issue of introducing and maintaining transparent terms and conditions of volunteering: “The conditions were presented, but

nobody honored the terms of our agreement” (R9). The third interlocutor stated, “If I don’t know what I am going to learn and what my role is, then I don’t want to participate in anything like this. Sometimes they should employ a worker instead of a volunteer” (R3).

The hypothesis that volunteers are more interested in taking part in clearly defined and communicated activities has been tested in quantitative surveys and disseminated in the literature (Brudney, 2012; Kulik, 2007; Hidalgo and Moreno, 2009; Allen and Mueller, 2013).

However, it is not just about the preparation of a voluntary job description—quantitative research shows that it does not correlate with positive volunteer outcomes (Rogelberg et al., 2010; Stirling et al., 2011; Studer, 2015). Despite that, the lack of ambiguity results in more satisfaction in the voluntary experience (Kulik, 2007). Uncertainty related to the volunteer’s role in the organization may, on the other hand, lead to burnout (Kulik, 2007; Allen and Mueller, 2013) and a stronger intention to resign (Allen and Mueller, 2013). It is also desirable that the non-profit organization has a “range of well-defined tasks from which a volunteer can choose” (Grossman and Furano 2002), so he/she can select the most suitable and preferable activities.

The former volunteer added that, in her view, “there are too many requirements towards a volunteer, but too little support [is offered] (...). Coordinators tend to forget that that person (...) has a private life and must accommodate it” (R2).

As Einolf summarizes, a variety of studies proved that “volunteers who had positive perceptions of the supervision, communication and support they received from the organization volunteered more hours and were more likely to continue volunteering” (Einolf, 2018, p. 11).

### Scope of duties

Two main issues were raised in the interviews: imposing an excessive amount of duties on volunteers and, on the other hand, ignoring volunteers’ abilities and ambitions by proposing unimportant, minor tasks that are (subsequently) not assessed by the organization.

One of the former volunteers shared a sincere comment:

A volunteer is not a worker who could be exploited (...). Unfortunately, organizations are lost in it. (...) The fewer volunteers arrive, the more duties the others have to share, but to demand it from people (...), to impose new duties that result in pulling an all-nighter (...) and the resignation [is unacceptable]. (R9)

Similarly, another person cautioned organizations against using volunteers as PR specialists—instead of behavioral, financial rewarding of volunteers who promote the organization online and in person, she suggested hiring an expert tasked with strategizing publicity (R3).

At the other end of the spectrum are the stories of volunteers who felt unneeded and unappreciated due to the lack of obligations and long-term support and evaluation from a non-profit organization. Two former volunteers were disappointed because of “blurred responsibility” (R4), lack of communication, feedback, and management that could support, motivate and coordinate volunteers’ work and scope of duties. “There was a complete misinformation at the end of the project” (R4), “two people were assigned to the same task so (...) I didn’t feel obliged (...). It was discouraging” (R4). Another added that she lacked “a supportive mentor, training, on boarding (...), good management” (R5). Even though she liked the volunteering itself, she finally left the organization due to the lack of a leader who would coordinate volunteering, encourage engagement, and spark a sense of belonging.

## Employees

### Former employees: reasons for resigning

The analysis of former employees’ narratives is centered on three major categories: management factors, financial aspects, and relational facets. All of them played a significant role in the decision-making process related to the resignations, as most of the respondents shared a story of a complex, long-term, ambivalent job experience in a particular non-profit organization. Additionally, the phenomenon of ‘social activism in transition’ is present in the narratives, as the interlocutors did not radically ceased their involvement (paid or/and voluntary) in both non-profit organizations and informal initiatives, finding alternative ways to co-create a common good.

### Management factors

All former workers highlighted management problems and dysfunctions at the non-profit organization they used to work for. They referred to a lack of clear procedures and rules, a lack of structure and long-term planning, an authoritarian style of leading the organization, the incompetence of leaders, and the feeling of chaos and meaninglessness (R12, R13, R14, R15, R16, R17, R18). They can be a result of “a poor work ethic, mismanagement, staff turnover, non-use of the potential” (R15). Moreover, as the interlocutor pointed out, there were “no mechanisms developed, and a lot of time was wasted by thinking over conflicts that we pointlessly generated” (R18).

One of the former workers summarizes his experience in three blunt phrases: “a mess, not fulfilling the mission, and *projectosis* [Polish informal term used for a widely and wrongly implemented model of project work]” (R15). In the perspective of the respondents, the mess is widely associated with the non-profit sector in Poland, where “everyone does everything, nothing is on time (...), you have

the feeling that a lot of tasks you do at work are pointless (...) and do not serve the public mission” (R15).

Another former employee expressed her doubts in a similar manner.

I fear (...) the lack of procedures: recruitment and termination of the employee. (...) It is always said that associations are based on people (...). I am truly afraid of them, especially having experienced such an inconsistency between the socially engaged person I heard about (...) [and the one] who dealt with my dismissal so ‘nicely’ (...). As a boss you should be responsible and (...), that way, you part with your employee with both sides being on the same page. (R13)

When describing the inside reality of the particular non-governmental organization, the diversity of its aim, scope, history, structure, funding, and stages of development should be taken into account. The last issue was reflected on by one of the respondents: “In many organizations that (...) emerged based on idealistic convictions, a critical moment appears, when revenues rise, the structure expands (...) and you need a really good manager (...). The organization falls into a growth-related crisis” (R12). In her organization, both the authoritarian leader and the top managers (nominated by him) were “bad people” (R12), and it became a “one-man institution.” According to the respondent, over one quarter of the staff quit the job in the NGO due to the negative atmosphere, bad leadership, and mobbing. Interestingly, she emphasized: “The organization is great, [it is] only the people [who] are not great” (R12), thus underlining the role of the human factor even in the social organizations whose officially stated mission is admirable.

The private sector has been a common reference point for the interviewees, especially when they formulated recommendations for the Polish third sector. Nevertheless, the advice was not always coherent. The majority of the respondents compared the private and non-profit sectors, highlighting the positives and good business practices. Four of them emphasized the need to implement fixed procedures, set structure and management processes, similar to companies. One of the former non-profit workers suggested that one of the potential solutions for management mistakes in NGOs could be the process of recruiting top managers from corporations as non-governmental leaders due to their excellent leadership skills (R12). On the other hand, another activist shared a negative experience related to such situation: “The person with no prior experience in an NGO has come to manage us. She used to work in business (...). She couldn’t stand our flat hierarchy, participation” (R17). These two contradictory opinions can be easily explained by the role of people, i.e. the human factor that shapes particular institutions. She also expressed her positive view on the NGO’s workers: “They are the best employees in the world. Very flexible, they learn everything by themselves (...). In a company, you do the same task all the time” (R17). Nevertheless, the educational process related to working in non-profit organizations was not assessed positively by all of the respondents. One of the people lacked professional training: “NGOs must

simply learn human resources management, motivating, mentoring” (R14), which the interviewee saw as far more developed in the private sector.

### Financial aspects

The thesis about profit- and efficiency-driven logic diffused among non-profit organizations has been a subject of numerous research studies (Putnam, 1995; Pestoff, 2009; Załęski, 2008; Krastew, 2013). In the context of the changing social and economic conditions, NGOs encompass a variety of funding forms, from small-sized, voluntary-based institutions with very modest resources to corporation-like social enterprises with a large number of professional, paid staffers. Depending on the structure of funding in particular non-profit organizations, various problems and challenges emerge.

Financial aspects included in the respondents’ narratives could be divided into two categories: organizational (sources of) funds and salary range. As one of the responders summarizes, “the money from competitions and grants is very restricted (...), you can only use it for concrete, limited things” (R12), which often leads to employment insecurity and a lack of spare money for operational costs. On the other hand, more ‘flexible’ financial resources based on institutional and individual donations require “truly wise management so you don’t exaggerate with the costs” (R12). In the three described organizations such funds were unfairly allocated for extremely high commissions, operational costs, or the leader’s salary (R12, R14, R15). As one of the interviewees admitted, “Some NGOs describe themselves as social enterprises and they are ones since they take money from grants to provide a high salary for the leaders, and they operate for profit (...). To me, NGOs are companies (...) based on a flawed ideology (...), operating like exploitative enterprises” (R15).

Similar conclusions were drawn by the second respondent, who observed that “for the association, only paying the membership fees is important (...), it seems to me that it is not an association but a company (...) which uses this form of operation (...), it is some kind of a facade” (R17).

In the case of the second category, i.e. the salaries, the majority of interlocutors postulated that fair, decent wages should be offered to non-governmental employees, stable job agreements should replace junk contracts, including medical insurance, especially in cases of highly responsible, demanding, complex areas and tasks requiring expertise (R12, R13, R14, R15, R17). Such postulates are, however, jeopardized by the strong discourse of “do-gooders” who should be involved in social activism on a voluntary basis: “If we do something for others, it is our passion (...) why do we need to be paid?” (R13). The slogan “we work because we like it” can be easily misused in order to take advantage of workers (R13, R15), therefore “a clearly defined structure [of the organization], duties, promotional procedures and financial issues” can be the potential solution (R13). The lack of transparency

is problematic and can lead to fraud and exploitation (R12, R13, R15), especially when—at least in the official discourse promulgated by the third sector—motivation comes first, before financial benefits. Some former workers directly referred to “the exploitation of volunteers and paid staff” (R14, R15), and the unacceptably wide wage gap between the leader and the rest of the employees (R15, R17). The issue of underpaid and underappreciated staff was widely and openly discussed in one organization (“the topic was often raised, and it was a reason of frustration (...) among highly energetic, ambitious, hard-working employees” (R17), while in other NGOs it was rather hidden (R13). Overall, all the interviews implicated “the low salary syndrome” (R17) in the Polish third sector.

### **Relationships, hierarchy and communication Founder's syndrome**

As Schumacher noted, the “founder’s syndrome is an occurrence in the non-profit community when the originator of an organization, still in charge, is no longer qualified or able to serve the growing or changing needs, not willing to let go of the organization they birthed, this can pose problems for further growth” (Schumacher, 2010, p. 45).

Four of the interviewed former workers underlined the problem of the “everlasting leader” who imposed the model of operating the institution that prevented the optimal development and positive atmosphere inside a particular NGO (R12, R14, R15, R16). As one of the people bluntly noted, “It is also, most probably, a characteristic of (...) many NGOs that the boss never changes and decides everything [alone] (...). He or she appoints (...) new coordinators of some issues, who after a few months are dismissed or quit because they have had enough (...)” (R15). Another interviewee claimed that, despite the supervision conducted in an organization where bullying was omnipresent, its president believed that “she does good and the world is bad (...). She still didn’t understand, (...) she is stuck in her own reality (...), it is a dysfunction” (R16).

Moreover, six former employees of non-profit organizations pointed to characteristic internal conflicts inside their respective institutions, i.e. the clash between the board/the leader and the staff. The struggle between workers and the board members or the director often leads to the unifying process among employees: gestures of solidarity as a form of dissent in the face of unfair treatment from the supervisors (R12, R13, R14, R15, R16, R17). All interlocutors had positive, or at least neutral, memories related to some staff members. In a few cases, there was a big difference in the perception of relationships between colleagues and supervisors, described as “a community of anger among people working at the same level (...) directed towards the bosses, supervisors (...) who demanded absurd things or were giving wrong, problematic orders” (R15); “it was hard to work with her [new boss],



because she was impulsive and demanded strange, difficult things (...). We couldn't get along" (R14); "strong division inside the organization (...). Some people have been favored by the top brass, there was some snitching" (R12); "I have a very good recollection (...) of the girls from the office (...), we were close (...). [As for] the board (...), they undermined our role, there was a constant conflict" (R14).

In such cases, the implementation of the hierarchical model (increasing employee engagement and shared power) could serve as a suitable alternative throughout the professional assessment and reporting system of the third sector.

### Mobbing

Four of the interviewees admitted that there had been mobbing inside the NGOs they had been cooperating with. Mobbing has recently been reported in several high-profile cases in Poland and debated both in the mainstream media and trade journals.<sup>4</sup> However, interviews did not concern any of those institutions, but the ones where bullying was not publicly disclosed. Moreover, the interviewed activists admitted that mobbing was not only targeted personally, but concerned at least several people in a team and led to multiple resignations (R16, R17, R18).

Two of the respondents experienced long-term bullying, which made them seek psychological help (R12, R16). One of the people sincerely commented: "I no longer try to throw myself into [the kind of] work that causes burnout. (...) I used to be in a classic dilemma: I receive two thousand [as a salary] and spend one thousand on therapy" (R16). She refers to two widely disseminated views on problems in non-profit organizations: low salaries and ill (power) relationships that force workers to seek psychological support.

### Recommendations

Several interviewees had shared their general opinion and impressions related to the functioning of the third sector in Poland. Most of them understood and underlined the subjectivity and selectivity of their personal assessment. Despite the obvious

<sup>4</sup> <https://publicystyka.ngo.pl/praca-w-organizacjach-mobbing-w-ngo-odbija-sie-na-calym-spoleczenstwie> [07.09.2019], <https://publicystyka.ngo.pl/ogolnie-zle-ale-w-organizacjach-pozarzadowych-najgorzej> [07.09.2019], <https://praca.gazetaprawna.pl/artykuly/877216,praca-w-ngo-pozarzadowe-lamanie-prawa.html> [06.09.2019], <https://oko.press/nie-tylko-ks-stryczek-organizacje-pozarzadowe-to-wspolczesny-folwark-wywiad/> [07.09.2019], <https://www.tygodnikpowszechny.pl/feudalny-mamy-klimat-156309> [07.09.2019], [https://wiadomosci.onet.pl/tylko-w-onecie/tutaj-nie-jestem-ksiedzem-jak-sie-pracuje-w-szlachetnej-paczce-reportaz-o-ks-jacku/jl3gflj?utm\\_source=wiadomosci.onet.pl\\_viasg\\_wiadomosci&utm\\_medium=referral&utm\\_campaign=leo\\_automatic&srcc=ucs&utm\\_v=2](https://wiadomosci.onet.pl/tylko-w-onecie/tutaj-nie-jestem-ksiedzem-jak-sie-pracuje-w-szlachetnej-paczce-reportaz-o-ks-jacku/jl3gflj?utm_source=wiadomosci.onet.pl_viasg_wiadomosci&utm_medium=referral&utm_campaign=leo_automatic&srcc=ucs&utm_v=2) [07.09.2019].

unrepresentativeness of individual narratives, a disturbing picture emerges from this part of the research.

One of the respondents, although hesitant towards formulating “a recipe for the salvation of the world” (R16), emphasized the contemporary obstacles for the optimal development of Polish NGOs: “the lack of resources, unsupportive political atmosphere (...), large scale of burnout (...), people leave the organizations, the boards, go [far way] (...). There is bullying, fraud and abuse, [all] just to have money” (R16). In challenging the structural conditions, she believes that members of the third sector will themselves find the way out in the long run, by mutual support, and opposition to negative and illegal practices. Burnout was mentioned several times, especially in the context of dirty methods of demotion and dismissal, bullying and abuse.

The issue of transparency was also raised multiple times. Respondents advocated an implementation of both state and non-state means to provide fair and regular assessment and control of NGOs’ operation: “an index of transparency (...) [made by] representatives of various institutions” (R12), “highly developed reporting (...), Labor Inspection’s development (...). Labor law, making labor relationships more civilized is the key” (R15).

Another repeatedly acknowledged issue was the lack of optimal procedures, sets of rules, well-established and clear structures and long-term planning of the organizations (R13, R17), as well as underappreciating the competences and agency of staffers, and decision-making deprivation caused by the dominating leader.

## **Conclusions**

### **Social activism in transition**

Exploring the life trajectories of the former volunteers and staffers, I have found that the majority of them did not sever all ties with their social involvement, including the support for particular non-profit organizations. Numerous strategies aimed to channel individuals’ needs to build a common good have been disclosed. I describe such a phenomenon as ‘social activism in transition.’ Moreover, despite focusing on transition moments and causes of terminating voluntary/paid work in the third sector, it is crucial to note that all the interlocutors also pointed to the positive aspects of their non-governmental experience. Five people called it a significant ‘formative experience,’ a period of life that had shaped their views and mindsets.

Eight interviewed volunteers mentioned subsequent voluntary engagement in realising short-term projects in different NGOs to the ones they had left. Most of them occasionally take part in various voluntary actions organized by non-profit organizations. Two of them took up paid jobs in a different non-governmental institution.

In the case of the former employees, five of them are regularly involved in numerous grassroots initiatives. They feel the need to do something for the common good, but do not want to be financially bound with the third sector. One former worker who suffered from psychological problems after cooperating with an NGO has become a co-initiator of a bottom-up, informal, unregistered initiative: “I found my place (...). I ran away from everything and I felt better” (R18). Another did not decide to enter another NGO due to “a lot of bitterness” she still feels afterwards. Nevertheless, she has been volunteering in a few other non-profit organizations, “without the feeling of a burden, without the power games” (R13). The third interlocutor has been supporting an informal initiative for women for over two years. Another person stated that she could “get involved in some informal action, support, because—unfortunately—NGOs have a mean streak and they can’t really do what they are meant to do (...). I see some crisis in that sphere. Unfortunately, it is caused by the people” (R17).

Moreover, despite the lack of self-identification as current NGO workers, some of them cooperate with non-profit organizations occasionally. As one of the people noted, “I crossed them [NGOs] off the list of [my] potential employers (...). Currently, the best deal is to take a big number of commissions (...). I would never ever want a situation in which my main [base?] salary is connected to NGOs” (R15). Similarly, another person sporadically takes commissions for short-term projects, such as providing workshops in the non-profit organization (R16).

Two more cases are of special interest—that of an experienced former NGO worker who started to work in the public sphere as a coordinator of a project aiming to develop the cooperation between local authorities and the third sector, and the person who said, “I have a dream that if I got rich (...), I would establish my own NGO and help on my own terms (...). If I had a lot of money, I would definitely invest in and support the third sector” (R14).

### **Discussion points**

Reflections of the interviewed former volunteers are consistent with several surveys conducted on a larger scale. Meaningful and high-quality jobs assigned to volunteers proved to be correlated with their satisfaction and a higher intent to stay in the organization (Kulik, 2007; Jamison, 2003; Dwyer et al., 2013). Research showed that a well-thought out initial orientation process, training and interviewing of potential volunteers to match them with suitable assignments have a positive impact on the volunteers’ retention (Wisner et al., 2005; Hidalgo and Moreno, 2009; Studer, 2015; Tang et al., 2009). According to a study conducted by the Urban Institute, non-profit organizations “interested in increasing the retention of volunteers should invest in recognizing the volunteers, providing training and professional development for them, and screening the volunteers and matching them to organizational

tasks” (Hager and Brudney, 2004). What is more, the voluntary involvement is also traded-off in comparison with other activities (the issue of new commitments/lack of time).

To sum up, based on the previous research and the narratives of the interviewed volunteers, it can be inferred that the choice of continuing or ceasing to volunteer for a concrete NGO is connected to “a complex set of individual, interpersonal and organizational factors shaped through the interaction of a volunteer with the organization” (Pepermans, Willems, Huybrechts, Jegers, Vantilborgh and Bidee, 2012, p. 886).

Despite a set of guidelines, the complexity and diversity of the non-profit sector and its members must naturally lead to the conclusion of an insufficiency of the one-size-fits-all approach. Therefore, I suggest a conditional perspective in which circumstances, conditions, and factors (both volunteer- and worker-focused, and program- and organization-focused) must dictate management practices in non-profit organizations. (Meijs and TenHoorn 2008; Brudney and Meijs, 2014, p. 302; Zappala and Burrell, 2002).

The analysis of the former workers’ narratives disclosed the phenomenon of ‘commercialization’ of the third sector in Poland, as well as the tension between the professionalization of NGOs, project-based working style, and the authoritarian, profit-oriented, ‘irremovable’ leaders (founder’s syndrome) and creators of the particular organizations. As Lester Salamon noted, in times when governments are dropping out from their welfare responsibility in numerous countries worldwide, non-profit organizations experience marketization processes (Salamon, 1993).

Despite the relatively pessimistic vision emerging from the survey, it is crucial to remember that the selection of respondents and the main topic has strongly affected this vision. As the former workers wisely concluded, “pathologies don’t deny the fact that there are nice organizations that are operating for the mission, possess enormous knowledge, experience, willingness” (R17), also noticing that “there are people who work in [non-profit – AB] organizations and have wonderful potential” (R13).

As an academic and practitioner, I strongly agree with the closing statement of one interviewee: “I dream about a well thought-out, well financed organization where people are truly satisfied with what they do, how they help; not about (...) professional help [that] will be associated with exploitation, misery and burnout” (R16).

### **Civic studies and researchers’ entanglements**

There has been a growing number of articles exposing problems inherent in the diverse spectrum of non-profit organizations in Poland (c.f. Dudkiewicz, 2009; Goszczyński, Kamiński and Kniec, 2013; Jacobsson and Korolczuk, 2017; Załęski, 2012). In the light of national and international political and socioeconomic changes

that weaken and undermine the role of the third sector, the repercussions of academic discussions are of great importance. As Adams and Perlmutter rightfully noted, “non-profit organizations are working in an era of heightened scrutiny, greater demands, fewer resources and increased competition” (Adams and Perlmutter, 1995, cited in Hackler and Saxton, 2007, p. 474).

In the above context, at the end of the chapter I would like to raise several ethical questions related to studying contemporary civil society:

- How do we, as researchers and/or activists, talk about the third sector in Poland? Do we support or decry particular actors, policies, legal changes or working styles? Do we have a political, ideological or pragmatic purpose?
- Do we try to challenge various clichés and popular formulas of analyzing a civic society (c.f. *Trzeci sektor fasady i realia* 2012, p. 249)?
- How to cope with the practical and ideological entanglement when studying civic society? How to deal with “extreme narratives” of the interviews conducted (illegal procedures, personal harm, psychological problems of former workers and volunteers in NGOs)?
- How to seek a balance between fault-finding and a critical and constructive perspective on analyzing civic work?

Even in a time of an omnipresent crisis, we shall care about the way we deliberate on social engagement, and in the case of emerging problems we could support the stakeholders involved—both theoretically and practically—by seeking common solutions for the sake of the public good.

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## Streszczenie

### **Aktywizm społeczny w okresie przejściowym. Analiza przyczyn rezygnacji aktywistów z pracy i wolontariatu w trzecim sektorze**

Pracowników pomocy społecznej łączy historia wieloletniej współpracy z trzecim sektorem w zakresie profilaktyki, zaspokajania potrzeb osób zagrożonych wykluczeniem oraz wzmacniania potencjału społeczności lokalnych. Celem artykułu jest omówienie badań jakościowych dotyczących przyczyn stojących za decyzją o odejściu wolontariuszy i pracowników z organizacji pozarządowych. Badania te ukazują zjawisko nazwane przez autorkę „aktywizmem społecznym w czasie zmiany”, które powinno być uwzględniane przez osoby profesjonalnie zajmujące się udzielaniem pomocy innym. Analiza oparta jest na dwóch okresach badawczych: 2016–2017 oraz 2018–2019, podczas których przeprowadzono 18 częściowo

ustrukturyzowanych wywiadów z byłymi wolontariuszami oraz byłymi pracownikami warszawskich organizacji pozarządowych. Rozdział zawiera przegląd literatury, opis metod i technik badawczych, analizę przeprowadzonych badań, jak również podnosi kwestie dylematów etycznych związanych z realizacją badań jakościowych dotyczących społeczeństwa obywatelskiego. Wyniki wskazują, że niemal wszystkie objęte badaniem organizacje pozarządowe mierzą się z wieloma problemami i barierami wynikającymi ze sposobów ich zarządzania i finansowania oraz z relacji, które panują w zespole. Większość badanych (byłych wolontariuszy i pracowników trzeciego sektora) zmaga się z napięciem związanym z postrzeganiem i doświadczaniem wolontariatu i pracy zarobkowej w organizacjach pozarządowych z jednej strony jako uregulowanej, wysoce sformalizowanej działalności o coraz silniejszych powiązaniach ze sferą biznesu, z drugiej zaś jako dobrowolnych, nieskrępowanych aktów dobroci i empatii.

**Słowa kluczowe:** organizacje pozarządowe, trzeci sektor, inicjatywy oddolne, aktywizm społeczny w Polsce

## Radical and Critical Approaches in Contemporary Social Work: Cases of Activism and Advocacy-Oriented Practices in Selected Polish Civil Society Organizations

### Abstract

Social workers often refer to social justice and overcoming oppression as one of the profession's core values that are established as an ethical imperative. Such statements are emphasized in different documents about the profession on global as well as local levels. While many social work professionals are involved in the tireless fight against inequality and oppression, this research tries to challenge the professional statements that often are considered self-evident and explore how they are understood and incorporated in everyday practice.

In today's social climate when in many contexts social work is conducted primarily within state-run agencies, the concepts of radical and critical social work strategies for direct practice seem too theoretical or problematic to implement. Words such as social justice and oppression sound irrelevant for policymakers and the public, implying that radical and critical approaches in the field of social work are not vital or viable anymore. Therefore, this study takes Poland as a target country to explore the concepts of radical and critical approaches in contemporary social work by analyzing activism and advocacy-oriented practices in Polish civil society organizations. By applying the case-study methodology, field observations, and in-depth interviews with activists and social workers, this study also comes up with context-informed suggestions for the future social work practice to pursue the profession's inherent aspiration towards social justice.

**Keywords:** critical social work, social activism, advocacy, civil society, social movements, NGOs, case-study, Eastern Europe, Poland, Post-socialist social work

### Introduction

From its very beginning, social work has been caught up in a debate about individual- and structure- oriented approaches. Some of the social workers emphasized the importance of casework, others stressed the structural inequities and the importance of social change (Ehrenreich, 1985). Over time these discourses converged,

and the idea of fighting for individual well-being and social justice has been proclaimed as a main mission of the profession, reinforced in different international and local publications. It is explicitly declared that social workers should be “involved in a broader political action and define advocacy as a core professional requirement” (Mendes, 2007, p. 26). In addition to that, the International Federation of Social Workers puts an emphasis on the “principles of social justice, human rights, collective responsibility and respect for diversities” as the central tenets of social work (IFSW, 20014). However, it is argued that there is still a gap between declared principles and statements, on the one hand, and everyday realities, on the other (Ferguson and Woodward, 2009): “The profession of social work has never been able to rid itself of the ambiguity of hovering between archaic individualism and a possibly radical collectivism” (Gettlemen, 2011, p. 327).

Even though there has been a discrepancy between social-justice rhetoric and social work practice reality (Specht and Courtney, 1995), some social work writers argue that social work has never been a radical profession (Stoesz, 2009; Wagner, 1990). In fact, there have been some questions and debates, such as that of whether social activism is compatible with professionalism (Healy, 1999; Reeser and Epstein, 1990). Despite these doubts and debates, social activism has a firm history in social work (Reeser and Epstein, 1990). The civil rights movement featured social workers who pushed to advance social and economic justice. Social workers were also fighting for women’s rights, migrants’ education, health care (Carlton-Laney, 2001). Currently, numerous social workers are involved in different human rights movements such as the gay rights, feminist, disability, and Black Lives Matter movements. Additionally, social activism and advocacy strategies have been proved attractive as an implementation of radical social work and as an aspect of anti-discriminatory work (Payne, 2015). However, as noted by Payne, there is some controversy around the ideas of activism and advocacy, which are widely applied in non-critical contexts as well. Therefore, it is argued that the social work profession must develop advocacy and activism roles for communities within a radical framework that provides a clear conceptual guidance for social work practices (Ntebe, 1994). We also have to bear in mind that the contemporary socio-political environment in which social work operates has changed since the 70s and the 80s when social workers in social and public spaces were primarily seen as activists and advocates (Payne, 2015). As mentioned above, the labor process in social work has been transformed, especially in the state-run agencies, decreasing the time social workers spend with service users (Weinstein, 2011). So, while social workers might have critical analysis in mind, their practice of individual work does not necessarily lead to radical or structural practice (McDonald, 2007).

On the contrary, the civil sector has been perceived as an alternative to state bureaucracy (Ferguson and Woodward, 2009). In its general sense, civil society refers to all those voluntary, community, religious, and private networks and

organizations that are not part of the state. It has been employed both by activists involved in different social or political movements, also by the state through funding different organizations to deliver the services (Najam, 1996; Pokhleba, 2016):

The renewal of civil society has been associated with demand for a larger role for voluntary welfare provision in both western society and the former Soviet Bloc. The voluntary sector is perceived as (1) an alternative to state bureaucracy and professional elitism and (2) a public space between government and the market. (Powell, 2001, p. 118)

One among the main characteristics and aspects of civil society organizations is the “closeness to people it serves” (Hope, 2007), implying that the third sector is likely to provide the knowledge about some key areas of needs in the community. Apart from that, it is argued that the civil sector is able to innovate, be flexible and informal, and generate higher civic engagement. Independence from the state sectors gives them the space for campaigning and advocacy. The latter is perceived as one of the main attractions for social workers to work in the non-statutory sector: a possibility for a more political, campaigning approach where the ideas of civic participation, activism, and advocacy seem to fit in naturally (Ferguson and Woodward, 2009). Still, it is argued that the traditional image of the civic sector as a place where radical and critical social work approaches can be applied is increasingly hard to sustain. This is most apparent in the face of short-term funding, which makes it difficult to create sustainable civic engagement or results, underpaid and often undertrained staff, and “patchy levels of service user involvement” (Ferguson and Woodward, 2009, p. 88).

In order to explore these issues, cases of activism and advocacy-oriented practices in selected Polish Civil Society Organizations were analyzed. These organizations represent grassroots movements, activists’ groups, and organizations with a more formal structure. In exploring activism and advocacy in the context of radical social work, this study aims to conceptualize the concepts and explore their relevance to practice based on the data collected in the field (1); also, the study will identify the practice methods employed in the civic sector to realize the idea of radical social work (2); and explore the gaps/challenges hindering the boost of radical social work (3). As Poland is the country in which the research is conducted, the study-related and context-specific information about social work in Poland is provided in the following chapters.

### **Theoretical background – social activism and advocacy in social work**

There are various debates on why social activism or advocacy of social workers is less noticeable. In spite of the declared principles, it is argued that social workers do not participate in social action, and some even doubt if activism is compatible with professional practice (Mendes, 2007). Some writers characterize social work

profession as the practice with “the lack of interest in or even antagonism to social action” (Haynes and Mickelson, 2003, p. 11).

One of the main reasons why social workers might shy away from engaging in social action may be the workplace constraints. Many social workers are employed by government agencies—this can serve as a limitation to speak out against government policies (Haynes and Mickelson, 2003; Schneider and Lester, 2001). In addition to that, poor working conditions with heavy caseload and frequent crisis interventions leave little energy or space for a broader structural practice (Gilroy, 1990). This does not necessarily mean that statutory social work is completely incompatible with activism or radical social work, many social workers in state-based agencies are engaged in critical practices while preventing systemic abuse of vulnerable groups in settings such as correctional facilities and advocating for child protection within their respective agencies (Mendes, 2007). As noted in the introduction, the private sector also struggles with the same challenges in the light of short-term external funding, differences of opinion between donors and organizations, and underpaid and undertrained staff (Ferguson and Woodward, 2009).

Another factor contributing to the reluctance of social workers towards involvement in social activism might be social work education. It is argued that many social work curricula lack the adequate political content and related practice skills (Haynes and Mickelson, 2003). Although some social work courses offer social policy subjects, they are generally taught separately from social work theory and practice subjects, and hence fail to provide students with the practical skills applicable in social work settings (Ife, 1997).

Lastly, the idea of professionalism seems to evoke doubts as to whether social work belongs to the field of social activism and advocacy. It is argued that professional discourse and its focus on competencies, standards, and accreditation, has undermined its commitment to social change (Mendes, 2007). Besides, the increasing involvement in clinical casework has led social workers to emphasize individual rather than structural dysfunction (Haynes and Mickelson, 2003; Mullaly, 2002; Reisch and Andrews, 2014).

The research done by Reeser and Epstein (1990) found that social workers in the 1980s were more likely than their contemporaries in the 1960s to identify structural rather than individualistic causes of poverty, and to participate in social and political activism. Therefore, it is argued that “the key determining factor is not professionalism *per se*, but rather the ideology of professionalism” (Mendes, 2007, p. 28). Consequently, professional bodies which stress and promote social justice objectives can potentially contribute to social activism (Reeser and Epstein, 1990).

Examples of social activism might include practices such as advocating for service users within particular agencies, facilitation of community groups and campaigns, local activities to support the indigenous people, participation in welfare lobby groups, and involvement in broader political social change activities,

including local and global campaigns for human rights (Chui and Gray, 2004; Fraser and Briskman, 2005).

Advocacy strategies have been proven attractive in the recent years as an implementation of radical social work and as an aspect of anti-discriminatory work. In many ways, the concept of advocacy enacts social work values regarding social justice, and hence it is very often discussed with or as a part of social change or social activism. (Haynes and Mickelson, 2000; Schneider and Lester, 2001). Much of the social work literature on advocacy deals with a range of advocacy techniques, including lobbying, community organizing, social and political campaigning, policy research and monitoring (Ezell, 2001; Schneider and Lester, 2001). As mentioned above, the responsibility to advocate is asserted in many international documents alongside with social change and social action (Brydon, 2010).

The advocacy attempt should involve three actors – the advocate, the client and the decision maker (Sosin and Caulum, 2001). So, in this scheme advocacy is defined as an attempt to influence the decision maker to make a decision that would not have been made otherwise and concerns to a third party who is in a less powerful position than the decision maker (Sosin and Caulum, 2001). In some of the articles the “third party” is a client or group of clients, others claim that there should not be any separation between the advocate and the client (Claxton, 1981). Some of the authors claim that advocacy means to operate within the existing power structure and attempt to influence the power-holders’ decision making. Altering the power base is seen as a task involving more radical actions such as social movements (Horejsi et al., 1977).

However, another approach claims that social workers practice advocacy in several settings including not only agencies, advocacy organizations, professional associations, but also grassroots organizations and movements (McNutt, 2011). The only difference there involves workplace constraints, as some of these work settings offer more resources, while others offer a greater amount of flexibility and freedom. These different views on the focus of advocacy are captured in the classification proposed by McNutt (2011), according to which advocacy can be case-oriented and involve case advocacy for an individual or family; and cause-oriented, involving cause advocacy for wider social and community issues, intended to effect structural change. The latter aligns well with the ideas of activism and social justice-oriented practices.

### **Contextualizing the research: the case of Poland**

Various literature on the subject shows that at the beginning of the 20<sup>th</sup> century social work in socialist countries periodically went hand in hand with its Western counterparts following the ideas of fighting economic and social inequalities (Zavirsek, 2015). However, social work being caught up in an authoritarian political regime,

where communist leaders did not allow any innovations except those that introduced by the Communist Party, could not realize its potential fully (Smirnova, 2013).

After the collapse of the Soviet Union, social care systems have gone through a crisis and reconstruction, including new discussions on social work roles and social work professional education (Cisar, 2010). The inception of “emergency welfare state” after 1991 included new social policy legislation and the development of a mixed system of social services (governmental, nongovernmental organizations (NGOs), and private providers). As the former communist system used to be extremely centralized, radical system changes were called for in Poland. The new Act on Social Welfare of 1990 defined the scope and aims of social welfare especially concentrating on:

- Creating organizational conditions for welfare work, including the development of the necessary social infrastructure;
- Analysis and evaluation of the phenomena driving the demand for social services;
- Rules of allotting and paying out the benefits and allowances as envisaged by the Act;
- Mobilizing social activity in order to satisfy the needs of families and individuals;

Social work, understood as a professional activity directed at helping families and individuals to either regain or strengthen the skills needed for proper social functioning, coupled with the creation of conditions to facilitate that purpose (Act on Social Welfare, 1990; section I; chapter 2; clause 8.)

This extract demonstrates that social work in Poland is understood mainly as a case-/individual-oriented profession, however through this research I tried to explore not only the traditional roles of social work, but activism and advocacy-oriented practices and their implications for the social work profession. Hence the country-specific context was closely studied to select some of the grassroot movements and civil society organizations to explore the concepts of advocacy and activism and its relation to social work.

In the recent years, Poland has been seeing a societal backlash in relation to the curtailment of women’s rights. In April 2016, Polish organizations proposed amended legislation to ban abortion in all cases except to save the woman’s life. The bill was passed and debated in the legislative bodies, while a competing bill proposing a liberalization of abortion laws was rejected. Consequently, in September 2016, the demonstration called “Czarny Protest” (“Black Protest”) was organized (Bielinska-Kowalewska, 2017). In the subsequent days, similar protests were organized in other Polish cities. In October, thousands of Polish people went on strike to oppose the proposed legislation for a total ban on abortion, called “Czarny Poniedziałek” (“Black Monday”). In 2016, the ruling party rejected a bill that would have imposed almost total ban on the abortion after about 100,000 people joined



the protests (The Washington Post, 2016). The latest proposed legislation would allow procedures in cases where the mother's life was at risk or the pregnancy resulted from a crime but would ban abortions of fetuses with congenital disorders. In response to that, in April 2018 thousands of people took to the streets as part of the "Black Friday" protests in the capital and other major cities (BBC, 2018).

Such events encourage the grassroots movements and informal groups to emerge, self-organize, and create an effective resistance practice. Besides the quite vibrant social activism in Poland, the country has a strongly developed third sector with a focus on social engagement and participation. Civil society in Poland stands out for its ability to mobilize coalitions to respond to changing needs, issues, and interests and to monitor and work with the different levels of government. In other words, different studies and papers showed that Polish civil society organizations have the experience in information sharing and networking within the sector to inform and advocate within the government (Petrova and Tarrow, 2007). For the purpose of the research, activism and advocacy-oriented practices are explored in the civic sphere in Poland, providing the implications for social work practices, while bearing in mind the context and experience of the research country.

### **Research methodology Research objectives**

There is a continuous emphasis on the importance of social justice and critical social work approaches in everyday practice. Thus, this research aims to explore how the concepts of activism and advocacy are understood and incorporated in everyday practice, particularly in the context of radical social work. As there is a common perception of the civic sector being relatively free from the workplace constraints hence having more possibilities for the advocacy and activism, this research takes civil society organizations as case studies to explore social activism and advocacy. Consequently, our research has three objectives:

1. To explore the concept of radical/critical social work and its relevance to contemporary social work practices;
2. To identify practice methods that effectively incorporate radical/critical social work in social service delivery;
3. To identify the gaps and challenges hindering the boost of radical/critical social work practices, and to provide recommendations and practice implications for social workers.

### **Conceptual framework**

This study tries to understand the theoretical concepts in everyday practice. Therefore, the research investigates the concepts of social activism and advocacy through the

lens of radical and critical theories that have two main characteristics: they challenge the existing power structure (1), and they try to alter the power base (2). However, in doing so the radical and critical theories stress five key points that should inform social work practices:

1. A belief that the institutional structure of society is the primary source of the personal problem of clients;
2. A focus on economic inequality as a central concern and cause of the other social and individual problems;
3. A critical view of social service agencies as instruments of social control, co-optation, or stigmatization;
4. A focus on both structural and internalized oppression;
5. A value is placed on the possibilities for social change in challenging domination. It focuses on the transformative or emancipatory possibilities of social actions.

Conceptual framework helps us to explain the main things to be studied, i.e. the key factors, concepts, and the relationship between them (Miles and Huberman, 1994). As the research aims to understand how radical and critical approaches are understood in everyday practice, three key categories of the research have been formulated: the conceptualization of social activism and advocacy by respondents (1); the practice methods employed to realize the concepts in everyday practice (2); and rethinking social activism and advocacy in social work practices (3). Notably, these three categories seek to merge the theories used in this research with the data collected from the fieldwork. For instance, the conceptualization of activism and advocacy in practice is understood firstly through its conceptualization in key theories such as, for example, Honeth's recognition theory and anti-oppressive social work. Secondly, we sought to assess how social workers perceive the concepts of advocacy and activism within their work and what are some of the practice methods employed to realize the concepts in their practice. Thus, it is hypothesized that the conceptualization and subsequent manifestation of activism and advocacy will lead to a practical shift in these notions in social work practice. Hence, the last category is rethinking the concepts of activism and advocacy in the field of social work.

### Research methods

In an attempt to understand social activism and advocacy in practice, the case study methodology has been used. A case study is a qualitative approach in which the "researcher explores a bounded system (a *case*) or multiple bounded systems (cases) over time, through detailed, in-depth data collection involving *multiple sources of information*, and reports a case *description* and case-based themes" (Creswell, 2007, p. 73). It is argued that the case study approach "uncovers subtle distinctions and

provide[s] a richness of understanding and multiple perspective[s] that researchers are able to obtain on-site” (Kohn, 1997, p. 4).

Some writers do not consider case studies as a methodology, but rather a choice of what is to be studied (Stake, 2005), while others portray it as a strategy of inquiry and a methodology (Denzin and Lincoln, 2005; Yin, 2003). In this article, case studies are viewed as a methodology, a type of design in qualitative research that can help us capture the understanding of a specific issue or problem using a case as a specific illustration.

Another major design question the researcher has to solve is defining the ‘case,’ or ‘cases.’ This can be particularly complex in case studies because the case and its context are intertwined, and a single case may have several embedded elements. As mentioned above, the civic sphere is believed to provide more spaces for radical social work practices, hence the choice of civil society organizations as cases to explore the concepts of advocacy and activism. As we had many topics to cover with many different informants, we needed to decide which organizations could contribute the relevant data, and to what extent. For this reason, we conducted a preliminary screening of the organizations, referred to as “reconnaissance” in literature, to identify the organizations and people who can bring multiple perspectives and have the most to say about each of the major topics (Kohn, 1997). Before contacting the field organizations, we had formulated two main filters for the organizations to be considered relevant for this study: the incorporation of elements of social activism and advocacy (1), and the social service delivery/‘helping’ component (2). As we aimed to explore activism and advocacy, which are not exclusive to social work profession, and do so with an assumption that social workers’ involvement in social activism and advocacy is less noticeable, the presence of at least one criterion out of two was enough to choose a specific organization. Thus, we broadened the scope of possibilities for different CSOs to contribute to the research.

Based on these two filters, five CSOs were selected that identified themselves as advocacy- and activism- oriented. After preliminary visits and observations, three main organizations were selected for the research. The logic of the selection process was the following:

As a case study is a qualitative research method, the researcher did not intend to select cases that are statistically representative. Statistical sampling would require a large number of cases to be studied, undermining the strength of the case study method, which is to provide an in-depth analysis of the cases (Creswell, 2007). However, the main motivating factor to choose multiple cases for this research was to cover various perspectives on the issues of social activism and advocacy. Typically, the researchers select no more than four or five cases (Kohn, 1997). Three civil society organizations were selected for this research, which falls under the definition of a “collective case study,” to capture multiple perspectives on the research topic by selecting more than one case (Creswell, 2007).

With a conscious decision to use a multiple case study, the question of validity rises for the researcher. The selected cases included three CSOs operating in the field of women's rights. They represent different forms of civil society organizations. Two of them are grassroots organizations, and the third one is an NGO working for reproductive justice. By selecting three cases that constitute different types of civil society organizations, the researcher tried to achieve a certain level of heterogeneity among the cases to enhance the generalizability and cover the multiple and diverse perspectives on the issue. On the other hand, selecting the CSOs that shared some characteristics, in this case their work in the field of women's rights, helped establish a degree of homogeneity, thus enhancing internal validity and facilitating replication. The logic of replication in case studies refers to the procedures that are replicated by the researcher for each case.

However, besides these three CSOs, the expert interviews were incorporated in the data analysis. This decision was made because in the selected CSOs the professional social workers were not employed and only one of the selected organizations had prior experience in the field of advocacy. Hence, the informants with more than 5 years of experience in their respective field have been selected. It is not unusual for case studies to be applied with different research methods, using informants for the research aims to bring different perspectives and expertise to the study (Creswell, 2007). Overall, 10 interviews were conducted, 7 of which were done in three civil society organizations in addition to the field visits, document analysis and observation.

### **Data collection and analysis**

As case study research is typically extensive and drawing on multiple sources of the information, the data analysis begins in the field, during data collection (Yin, 2003). Notes were taken after each meeting; the first interpretations were made after each meeting, and tentative hypothesis were tested in subsequent interviews (Creswell, 2007)

Embedded analysis will be used in this research, which according to Yin (2003) is the way of analyzing a specific aspect of the case in a case study, rather than the whole case. Through data collection, a detailed description of the case emerges including the central concepts of the research, which in this case refers to the perception of activism and advocacy, its realization in the practice and major challenges in the process. As this research is concept-specific and tries to explore the activism and advocacy in practice using the respective cases as specific illustrations, the research will only refer to the target group of the CSOs (in this case, women) and review the field of women's rights to the extent it is needed to provide the contextual information. We also view it as a limitation of the study, as activism and advocacy in the field of women's rights might differ from other fields considering the country's context and experience (see the next section).

Since this research applied the multiple case study method, the analytical strategy would be to identify issues and themes within each case, followed by a thematic analysis across the cases (*cross-case analysis*), as well as an interpretation of the meaning of the case (Yin, 2003; Creswell, 2007). As mentioned above, the transcribed data was coded and presented in the data analysis section accordingly under each conceptual heading used in the interview guide (See appendix B).

### **Research limitations**

This study presented a few limitations that may have posed constraints to the reliability and validity of its data and findings. Time restrictions formed the primary limitation of this study, as the entire research process, from the initial contact with the field organizations to the writing and final submission, were confined to five months. Such time constraints affected the number of in-depth interviews that I could conduct with the respondents, as preliminary selection process also was time-consuming. Secondly, since only ten interviews have been carried out, the relatively small sample size constrains the representation and the reliability of this research. Notably, nine out of ten respondents were proficient in English, as discussed above; translation was only used in one case.

This research does not aim to generalize from one case to another because the contexts of the respective cases differ. Even though the selected CSOs work in the field of women's rights, the types of the organizations are different. Some are more social activism-oriented and form a strong social movement, while others conduct some service-driven projects or use the forum theater technique to contribute to social activism and advocacy. As mentioned before, this research is concept-specific and tries to explore the concepts in practice using the cases as specific illustrations. However, the context and the target group of each organization influence the way these concepts are understood and practiced. In other words, social activism and advocacy in the field of women's rights might differ from other fields considering the country's context and experience. Consequently, the research will refer to the target group and the working field of the CSOs (in this case, women's rights) to the extent it is needed to provide the contextual information and understand the concepts we are exploring in a given reality and context.

### **Activism and advocacy – different angles, integrated passions**

In this chapter the data collected from the field will be presented and analyzed in accordance with the pre-set conceptual framework on the chosen topic. To better structure and present the data retrieved in the field, we will follow three key parts of the interview guide. Three key categories/themes of the research are formulated: the conceptualization of social activism and advocacy by respondents (1), the practice

methods employed to realize the concepts in everyday practice (2), and rethinking social activism and advocacy in social work practices (3). Notably, these three categories will be merged with the data collected from the fieldwork and the theories and key characteristics of radical and critical approaches, discussed in the section on literature review and methodology.

### **Conceptualization of activism and advocacy in practice** **Social activism and advocacy in a political context**

All the participants of this case study described activism and advocacy as ways to help women and solve the challenges they face in the country. In the case of the women's rights the emphasis was placed on the rights of women to decide about their own body; poor access to the legal abortion and reproductive health; repressive abortion laws; domestic violence; sexual harassment in the public and private places—in other words, discrimination and oppression women face on different levels. From the participants' perspective, the reasons and causes of women's discrimination lie within the patriarchy that has dominated the politics, religious institutions, and society in Poland. In that context, social activism and advocacy are seen as political, and as being in opposition to the government and the Catholic Church, who reproduce and reinforce the oppression women face in the country.

It is really unbelievable, because it is one thing that the Catholic Church is granted its historical significance and is obviously a political player, but the fact that politicians are so submissive and respond to this goes against the basic democratic rules... we will not have reproductive justice as long as the Church does not step down, because our agenda is simply in conflict with Catholic preaching. So, they do not need to be silenced, but simply have their power limited. (Respondent 1 from the NGO)

The activists emphasized the rise of far-right and fundamentalist movements in Poland, which in their words challenge not only women's rights but also different groups in society, fueling the respondents' desire to become activists. As stressed by one of the respondents: "My main motivation to join the movement was my anger for the government... The mission of the feminist movement is to restore the human rights denied by the power of the rightist government" (Respondent 2 from the movement).

Even though activism is understood as the opposition to the major power verticals in the country, who have great influence and recourses at hand, going and marching against them is seen to be the most effective way to exert pressure on the decision-making process. Hence, social activism is seen as a direct action towards social change. As the interviews with activists show, social activism is also understood not only as a collective action for social change, but a form of civic resistance and holding people in power accountable. Even though social movements

are often triggered by single or multiple factors, in participation-oriented activism group action in and of itself is seen as important and beneficial to the participants (Mason, 1989).

### **Social activism and advocacy: complementary or substitutive?**

While social activism is portrayed as a more radical way to tackle oppression and injustice, the word radicalism evokes different connotations even among activists. Some think it antagonizes society, others feel that as long as it is peaceful, activism can take many forms: “Maybe throwing eggs is not that violent, [it] has not harmed anyone heavily, but it is still not peaceful... We need to stick to peaceful methods because this is how we fought against the communist regime in 80s.” (Respondent 1 from the NGO)

Even though radical approaches are not condoned by the respondents, they stress the importance of collective action, acting upon their values and their demands, so called “direct action” to change the situation. Even though, along with activism, advocacy was also seen as a way to achieve the social change, there was a slight variety between what activism and advocacy meant to the respondents. Advocacy was understood not so much as the collective action but as a negotiation and collaboration with other actors in the field:

Activism is about the mobilization of women and men, in our case, for reproductive justice... Organizing demonstrations or support rallies staged by other groups is a part of activism, I think. Also, advocacy is more about addressing our postulates to decision makers or in some case, the media when it is about discourse. (Respondent 1 from the NGO)

However, the respondents believed that when advocacy fails, demonstrations and collective action are the only ways to hold the government accountable and achieve change; in this respect, social activism was perceived as of a more collective and radical approach:

Under this government, advocacy is more difficult because they are more unfavorable to dialogue (...) We have been writing open letters and attending meetings of parliament committees, but they are simply obsessed with their own view and shut their eyes and ears to other arguments. (Respondent 1 from the NGO)

Another respondent conceptualizes the differences between activism and advocacy in such a way that advocacy involves proposing a plan or a specific change in the legislation in order to operationalize the demands of certain groups. She emphasized that legislative changes should be derived from within the local community and incorporated in professional practice—in that sense, advocacy is seen as a participatory approach to social change. Participatory advocacy is seen as a second stage in the social change-oriented work:

First, we need to identify oppression and see if this oppression is something that we need a change by law. So, we start delving into a specific subject of oppression and then we see: is the oppression coming from society, from the family, or from the law, and if it's the law, we can engage in legislative theater. (Respondent 1 from the case #2)

The above respondent had 26 years of experience in advocacy for people with disabilities, and she stressed that advocacy entails the promotion of issues, social campaigns, and cooperation with other organizations to be united in demands. However, it was argued that advocacy is dragged in time, and that the negotiations and conversations with the government on different levels do bring the change but are time consuming and cause the advocates to navigate between the government's populist agendas and lack of willingness to spend money on social issues, unless it brings them more electoral votes.

Even though there was a slight difference of focus while conceptualizing activism and advocacy, respondents mostly used them interchangeably. The main commonality between these two concepts was their commitment to the rights-based approach: to defend women's rights, to change the law or to prevent the law and propose specific solutions in the given circumstances. Activism, though, was seen as more effective way to provide the necessary pressure on the decision-making process partly because of the international touch it gives to the movement. This leads us to the next theme in our data analyses, which concerns the globalization of activism and advocacy concepts.

### **Internationalization of social activism and advocacy**

The civil society organizations selected for this study have experience in international cooperation. The NGO engages in advocacy on the international level by writing shadow reports for international organizations, while the grassroots organization (*case #2*) is part of an international movement. According to the respondents, cooperation with global movements and organizations gives them support and enables them to be taken seriously in the country: "I would say more cooperation with external, European organizations and governments or institutions like the UN would help... to put pressure on our governments, to abstain from some ideas, the abortion law" (Respondent 2 from the movement).

Even though many advantages have been listed of the CSOs going global, the challenge of addressing the complexity and diversity of the political, economic, and cultural environments in which they operate locally, still remains (Anheier and Themudo, 2002). In the case of women's rights, the activists gave an example of the abortion poster where the English word was used instead of the Polish one, which changed the connotation and triggered controversies even among liberal groups in Poland:



The agenda of U.S. feminists, you know, cannot be successful. And the cover of “*Wysokie Obcaszki*” [a weekly feminist supplement to the “*Gazeta Wyborcza*” daily] proved it because t-shirts said “*Aborcja jest OK*” (“Abortion is OK”), and abortion is OK in the United States and in English, it functions in a different way and it carries different connotations than saying something is OK in Polish. This misunderstanding of the cover was also a tribute to the fact that they used the word “OK” and not some Polish expression. (Respondent 1 from the NGO)

### **Intersectionality and collaboration in activism and advocacy**

As mentioned above, the underlying theme of social activism and advocacy for our respondents is to challenge the powerful systems and the capability of these concepts to achieve a social change. In this lens, social activism and advocacy are strengthened through the existing or desired collaborations with different actors, which adds to the narrative of activism being intersectional:

It is not only the matter of feminism, because feminism is but a very small part of this. Look at the black march, we started it in the left wing, but it has attracted women from the right wing as well (...) Everything is interconnected, one thing with another, there is no one simple thing I am protesting against or for. (Respondent 1 from the movement)

Grassroots organizations were expressing the willingness to collaborate with other organizations. Even though some kind of cooperation with different actors, mostly NGOs in the field, is already in place, they mostly complement each other with their activities. Grassroots movements collect gifts or different materials for the NGOs and their service users, while NGOs try to connect different grassroots organizations with each other by using their own resources.

However, when it comes to the collaboration in contributing to social activism as a social action, respondents emphasized several challenges: the NGOs funded by international organizations, the grassroots groups that do not have any ties with the government, and the other NGOs receiving money from the state to provide services, are unable to contribute to social activism equally. Notably, activists were quite understandable and less critical towards different actors in the civic field:

I don't think it is a 100 percent good idea from the organizations helping the victims of violence to fight against sexualization in advertisements, or for [the liberalization of] the abortion law, because it is too controversial, and they could lose the funding, not only from the government but also from their supporters. (Respondent 2 from the movement)

Nevertheless, the need of partnership and collaboration is stressed by the respondents. Coalition building is also seen as an effective advocacy strategy, which is employed by the NGOs. In this way, they stand united and try to represent the community as whole. One of our informants, a representative of an organization

for persons with disabilities, stressed the importance of the collaboration to propose changes at a central level of the government:

We suppose many things need to change on the governmental, central level, in this case we try to represent not only our organization, but as many organizations from Poland as possible. In the federation there are 60 organizations, we have meetings, we exchange proposals for what people want and recommend, and we gather this material and speak with the government. (Informant A)

Even though economic inequalities have been a recurrent theme in the interviews, they were closely tied to the field of women's rights, where some women with more resources can afford good reproductive services, having a good doctor, or accessing abortion in other countries. However, in relation to social activism and advocacy, the economic aspect was mentioned to emphasize the unequal nature of activism. Some respondents claimed that social activism can also be a privilege, afforded only to certain groups of people, especially when social activism is mostly done online and in the streets of big cities. In addition to that, in the context of general economic hardships, the possibility to engage in activism is limited: "I can understand that when somebody can't afford to send their kid to the school, they don't care about the court system in Poland" (Respondent 2 from the movement).

The main challenge in Poland is to show people that this affects them as well, [that] they need feminism as well, [that] they need reproductive rights as well ... That it is really something that affects us all, and that we need it. And it is not just a crazy idea of some wealthy young ladies from the capital or the third biggest city in Poland. (Respondent 2 from the movement)

The emphasis on the economic aspect and inequality is also reinforced in articles analyzing the civic participation in certain countries. For example, in the focus groups with environmental activists in Georgia, respondents mentioned the current socioeconomic context as a major hindrance to civic participation. They stated that due to the economic and social problems, Georgian citizens do not prioritize public issues. As one of the activist notes, "When your children are hungry, your main concern is how to feed them and not how to protect the trees on your street that are being cut down" (Tsuladze et al., 2017, p. 6). This rationale resonates well with the key characteristics of early radical theories, where the focus on economic inequality is understood as a central concern and cause of the other social and individual problems (Payne, 2015). In this case, it appears that it might also have an influence on civic activism and participation.

In conclusion, the main themes emerging while analyzing the data to conceptualize the activism and advocacy in the field are the following:

Social activism and advocacy are political; therefore, they address the power imbalance in society and try to change the power base. Advocacy and activism are

perceived as interchangeable concepts, but the first has milder connotations and is mostly associated with changes in the legislation or negotiations and cooperation with the government, while social activism is mostly understood as a social collective action. The interviews, field observations and document analyses showed that the idea of activism goes beyond the specific field and involves different topics; it is seen as a civic resistance, a value in and of itself, and the most effective way to provide the pressure on the power holders in society. One of the findings states that activism and advocacy in selected Polish civil society organizations have a clearly rights-based nature that resonates well with the global tendencies in activism. Notably, international support is seen as an additional mechanism to hold people in power more accountable. Expert interviews were in line with the major findings, with the provision that they put greater emphasis on negotiations, advocacy and community approaches, while acknowledging the power of social activism to achieve changes. The subsequent section will detail how these constructions and perceptions are realized in the practice field.

### **Practice methods to realize the concepts of activism and advocacy in practice**

#### **The venue for social activism and advocacy: the streets and the Internet**

The respondents classified different types of activism based on their activities within the specific group or organization. All respondents claimed that they were involved in street activism and web-activism, which entails various activities to incorporate activism in practice.

Some of the practical manifestations of social activism include demonstrations, strikes, and protest marches, however based on the interviews such a clear example of social activism was mostly reactive, triggered by specific events. For example, the “Black Protest” in Poland re-emerged after the government’s attempt to tighten the abortion law, the “Black Monday” in 2018 was a response to an attempt to take out one of the legal grounds to access the abortion in the country. In other cases, the emergence or re-emergence of collective actions is characterized by an ‘expression of anger’ towards the system. The strike of parents of persons with disabilities in the Polish parliament has re-emerged, demanding higher social benefits from the government. Nevertheless, these types of activism and their practical aspects evoke the question of how to engage and mobilize people.

The data showed that the activists were increasingly using the social media. The social movement whose activists we interviewed was created on Facebook and has quickly transformed itself into a ‘real’ movement. The informal group (case #2) has also increasingly used the social media to spread the information about the upcoming performances. Even though the social media have established

themselves as an innovative way of reaching out to people and a platform for communication, the respondents were mindful of their limits, such as, among other things, targeting only a homogenous group of people who are already active in the field. While this can be a good way to unite like-minded people, the respondents were stressing the importance to go beyond the Facebook bubble:

We try to use different channels and websites to address the women outside of this bubble, because Facebook now is not helpful in this regard: we [are] talk[ing] to people who are convinced. Facebook is useful as it helps us to provide more information to these women, to teach them (service users) how they can react in different situations, to provide them with some new arguments, new [event] dates, to inform them about some new events that they can support and some new petitions, and so on. Still, we are talking to the convinced people and we are simply mobilizing them to take another step in activism and advocacy (...) but the challenge, not only for us but for many organizations, is to reach those unconvinced, and for this we collaborate with local media read by all sorts of people with different opinions, or local events during which we talk to the women who are not yet involved in movements. This may be the way to get them more engaged. (Respondent 1 from the NGO)

In case of street activism, different methods were employed, including handing out leaflets, posters, going door to door, organizing festivals, events, movie screenings. One of the respondents suggested that boarding the tube with a megaphone and talking to random passengers is also a powerful way to talk to people:

Talking to the people is the most effective [way], because it involves direct contact and if somebody hears something on the radio, on TV, or reads a newspaper, they will not pay attention. But when somebody looks you in the eye, then you start to think, "This guy is passionate about things." (Respondent 2 from the movement)

The data showed that people beyond the organizations, referred to as "unconvinced," are the target group of the respondents. In some cases, the respondents saw the need to "educate" or "raise awareness" of the people who are not involved in social activism:

We inform society and educate society. We protest against something or for something. We go to the people, go out, hand out leaflets and talk with them in the streets. We inform them, just talk to them about the situation in the country, the situation with their rights, and what will happen if the rightist government becomes more powerful, and they are becoming more powerful every day. (Respondent 1 from the movement)

In the organizations with a formal structure, which have a service delivery component, respondents talked about the ways they try to help the women who reach out to them. In the NGO they have increasingly use hotlines, where different specialists including gynecologists, psychologists, sex educators, groups of lawyers answer calls and try to help callers. In this case, the people who have specialist

and specific knowledge try to help the women on the other side of line by offering them the legal advice, information and support. This creates a certain dynamic between the organization and the service users:

They come to us for knowledge, they see us as experts, but at the same time they see us as activists, and try to share their feelings, experience, and energy with us. And there is cohesion between us. Sometimes women also share their stories with us. We have this new campaign, in which every woman can write to us and we publish their stories to share how the law is not implemented, how the authorities break the law, and why it is unfair and how it affects women's lives. (Respondent 2 from the NGO)

### **Storytelling and participation as a practical domain of activism and advocacy**

The practice method used by the NGO that participated in our case-study is storytelling, mostly using the website and Facebook page where women write personal stories about their experiences regarding the reproductive health anonymously. The organization published the book, where the stories were told and written by women themselves. According to the respondents, this allows them to personalize the issues of reproductive health, build the pro-choice community, and talk to the people who stand in the middle in the debates.

The informant who works in the field of advocacy for people with disabilities stressed the importance to use every mechanism available for civic participation to implement the concept of advocacy in the field of practice, whether by attending the parliament hearings or participating in the special committees created in the local authorities. From the social worker's perspective (the respondent works in an organization tackling poverty), activism and advocacy were also understood in a participatory way. The discourse of convincing, teaching or educating was declared inconsistent with the practice and work. More emphasis was placed on engaging the people on an equal footing, acknowledging their struggles, and recognizing them as the ones who are experts on their life. In doing, so they go out to and work in their communities, trying to decrease the office-based social work:

When we work with the communities, we try to make them more aware of their rights. But we do not teach them their rights, we speak about how it is possible to create a stable society, and human rights come up. Sometimes we have workshops on specific subjects, and we ask people what they want to learn or how they want to learn. We try to find out or dig out the talents and competences that they have from their everyday life, and we try to show them that what they do is already an involvement. (Informant A)

With advocacy, we try to take as much as possible from people who live in poverty. If we are asked to react to some reports or propositions, we don't do this as a team at the

office but try to do it with the people we know... When we attend different meetings, we want people who live in poverty to be with us and speak up and not to speak for them. (Informant A)

In conclusion, the practice methods employed by the organizations depend on the nature and direction of work. The participants of the case study mentioned and emphasized the importance of internet and different social media platforms, storytelling, street activism including posters, mini events, and happenings, even talking with a megaphone on the tube. However, sometimes the practice methods are more effective in mobilizing people, rather than engaging those who are not involved. In the informants' interviews, the emphasis was placed on participatory approach and an equal relationship between the communities and workers. The latter was incorporated in practice by engaging the communities in every minor or major advocacy meeting, and by applying more of the strength-based approaches than the deficit-focused ones.

### **Challenges to incorporate the concepts of advocacy and activism in practice Funding limitations**

The participants of the case study claimed that the funding source had an influence on their capacity to be activism- and advocacy-oriented. The participants emphasized that international funding gave them more freedom. However, even in these circumstances the respondents perceived limited funding as an obstacle:

Our financial situation is quite good, we don't have money from the state, so we are not afraid that it will be withdrawn from day to day, but of course, if we had more money, we could hire bigger staff (...) We work with limited staff and do as much as we can, if we doubled or tripled our money, we could have more workers. (Respondent 2 from the NGO)

We are free in a sense that we receive funding from abroad, so we do not have any limits to what we do... We don't have any obligations, there are no limits to our actions, it all depends only on our choices. But we know that many organizations here in Poland have no other way than to apply for money from public funds. We understand it, and we also cooperate with such organizations. And a lot can be done even if you stick to non-radical methods. (Respondent 1 from the NGO)

Funding has been an important part of discussions about CSOs. It has been claimed that it is quite difficult to navigate between organizations' ideas and donors' interests. However, the NGOs that adopt the rights-based approaches may have easier access to funds from rights-based donors; otherwise, they would also face cuts from such donors (Olawoore, 2017). In the case of government funded projects, synergistic state-civil society partnerships are a common policy option in

handling social issues, however a study in South Africa revealed some challenges related to that model, namely the financial policies and the institutional capability to address the social issues effectively (Patel et al., 2012). One of the solutions to counterbalance this challenge has offered to enhance the informal and private donations to the organizations, making the organizations as participatory as possible and “close to the people,” thus challenging the instrumental nature of state-civil relations (Patel et al., 2012).

### **Burn-out syndrome**

The respondents and informants from non-governmental organizations examined in the study emphasized that daily routine and paperwork at their workplaces, coupled with many (sometimes unsuccessful) attempts to negotiate or advocate for a policy, contributed to the burn-out syndrome. In this context, grassroots movements were perceived as a “fresh force” with a lot of enthusiasm and “social spirit” to be engaged in direct action for the social change. One of the informants shared with us that she and her colleagues had been working with the government to advocate for small group houses for adults with disabilities for over ten years, attending endless meetings, without effecting any real change:

It is really difficult to come back to such meetings after many years [of doing advocacy], when we know that there is no-one on the other side who strives to make the world better for persons with disabilities, but only seeks to cope with the problem of authority. So, we are tired in many aspects... because such quiet and clever discussions with the government do not bring change, it is protests and street demonstrations that bring change with such things. (Informant B)

If you see this unwillingness to speak openly and to debate some issues, and you can see how powerful “Ordo Iuris” is, it clips your wings in a way. (Respondent 1 from the NGO)

On the other hand, the members of the grassroots movement stressed the stressfulness of their activities in a climate where the church, right-wing groups, government, and sometimes the media coalesce to oppose them. They also emphasized the differences of opinion among the people within the feminist community. The issue of being in danger for openly promoting the ideas that are not popular also has come up. The burn-out syndrome has been familiar to the activists as well, frustrating them and causing the disintegration of the movement:

Since 2015, there have been protests almost every week, every two weeks in winter and this permanent feeling of having to protest against something... People simply... have their own lives, their jobs ... so, instead they decide to emigrate internally, [stating] “I don’t follow the news, I don’t care [about] what’s happening... I’m done. I have no energy to fight with this shit again. (Respondent 1 from the NGO)

Sometimes I am furious that I sacrifice my free time, my money and I listen to the insults in the streets, and sometimes I have some trouble with the police, and they cannot appreciate what I do for them. But I still think that women's rights, or human rights, are values themselves. So even if somebody thinks that they do not need their rights, I will fight for them, because they are a value themselves. (Respondent 2 from the movement)

### **Implications and recommendations for social work education and practice**

The major findings on social activism and advocacy in the selected Polish CSOs showed that activism and advocacy as concepts are political in nature; they involve challenging existing systems, political or religious, and trying to change the power dynamic between society and its main power verticals. In this context, these findings are in line with the critical and radical theories putting emphasis on the structural reasons of individual problems. Other major findings illustrated the effectiveness of collaboration and intersectionality in activism and advocacy and using innovative and new platforms to translate concepts into practice. Even though most of our respondents were not professional social workers, this research aims to learn from the experience of the participants, as they were chosen based on their clear activism and advocacy-oriented vision and practice. Hence, the implications and recommendations for social work practices can be following:

- Social workers should act as activists and advocates in a certain political context.

The collected data indicates that social activism and advocacy are defined as collective actions against or for something, involving the expression of the dissatisfaction towards government, implying not only challenging the powerful structures but also changing the power base. On the other hand, social workers do not feel comfortable to be seen as political actors, as it might cause a confrontation with the system that sometimes employs them. Besides, in a certain cultural and political context taking a clear social justice-oriented stance in practice might require social workers to assume outspoken positions towards the political parties, government, and even political ideologies. A study done by Morgaine (2014) in the United States showed that American social workers are cautious about using the term "social justice" at work, as it evokes certain ideological connotations, "the tendency to conflate social justice with socialism and/or communism, which seems directly related to the contemporary media saturation from conservatives," and can make social workers uncomfortable and hesitant (Morgaine, 2014, p. 2).

However, the data obtained in our research showed that disregarding politics in social issues cannot lead or contribute to activism or advocacy in social work. One of the major tenets of the critical and radical approaches in social work entails the belief that institutional structures contribute to individual oppression, therefore



social workers should act as activists and advocates taking into consideration the political context and structures. This might involve direct political participation, such as running for a political office, or participating in political campaigns or any attempts to influence the structure and policies of the government collectively or individually (Hamilton and Fauri, 2001).

Since education plays a significant role in reframing the guiding concepts for social workers, it should incorporate more social policies and critical perspectives in the teaching. Even though many BSWs and MSWs include courses on social welfare and policy in their curriculum, they should be taught more in relation to social work practice field (Mendes, 2007). While social work education cannot influence students' or graduates' political participation, it can stimulate them towards political involvement through activities that reinforce the connection between practice with clients and the development of public policy (Hamilton and Fauri, 2001). One of the ways to achieve this can be through the concept of "merging knowledge" that was mentioned by our respondent entailing that the knowledge on the certain issues should be constructed with the people who experience it. This way, the teaching process is also transformed into a bottom-up model, and the social realities of the communities may challenge theories and traditional knowledge.

- Social workers should apply reflexive practices in relation to political actors and power relations, not just casework.

It is worth noting that social work practice is inherently political, some authors consider that even individual social work practice includes some political implications, since it addresses "the exercise and distribution of power and re-examines assumptions" (Chu et al., 2009, p. 293). However, social work services have been portrayed as providing a band-aid for the services users that drags the profession into the quite old debate about whether it is focused on individual well-being or social change. Besides, in the managerialist environment the heavy caseload and focus on paperwork might not leave the space for activism and advocacy. In addition to that, when it comes to challenging the powerful systems within society, such as religious institutions, such challenges might run against social workers' personal beliefs. However, social workers should reflect on their practice in relation to power dynamics and see themselves as a part of the same dynamics as well. They might have personal religious beliefs or even political preferences, but they should ask themselves if their practice addresses the structural gaps or merely makes service users comply with the system's expectations and interpretations of their problems (1); they should also recognize that while personal biases and preferences might be natural for every human, they might also act as power tools (2). One of the practical ways to do it is to use external supervisors from outside of systems or generate modules that will incorporate more radical and critical approaches in the supervision process.

- Social workers should collaborate with grassroots organizations more effectively

The data showed that the grassroots movements have more authenticity and closeness to the people struggling with social challenges. As one of the respondents stressed, “They are entitled to talk about oppression, because they are the ones experiencing it. It is their oppression.” In this context social workers should cooperate with grassroots movements and organizations to learn about the social problems where they exist, instead of merely serving the clients who are referred to them. In other words, venturing into communities and returning to the grassroots will help social workers to gain more profound insights into the ways they can contribute to social activism and advocacy.

The cooperation with grassroots movements should be beneficial to both sides, as social workers might not feel free to engage in certain activities because of their workplace constraints, while grassroots organizations are quite spontaneous, flexible, and innovative. The data showed that the collaboration of NGOs and grassroots organizations has been effective. The body of literature illustrates some other benefits of the cooperation as they “widen and deepen possibilities for citizen participation” (Mercer, 2002, p. 8) and in doing so it also contributes to the “bottom-up democracy” leading to the “top-down political change” (Fisher, 1998, cited in Mercer, 2002, p. 8).

- Transforming the “social worker-client,” “helper-helpless” dichotomies into more collaborative and partnership endeavors: social workers should engage in community and group-based activities.

One-on-one time with service users might isolate them with others who might have the same problems, so they can jointly address the challenges. The data showed that creating a space for the communities to speak out and share their individual experiences with one another is a fruitful basis for the collective action to address their issues together. Social workers should provide spaces where people can speak out and allow their voices to be heard in a broader context (Schiele, 2011). According to Bent-Goodley, the social work activist recognizes that the best solutions are often rooted in the indigenous responses within the community and “the strengths and resilience that are both visible and invisible to others” (Bent-Goodley, 2014, p. 102). A primary function of the activist’s role involves working closely with the community as a team member to “gain an in-depth understanding of their issues, support networks and strengths, actions that should be taken to resolve specific problems” (Allen-Meares and Burman, 1995, p. 273).

- Going beyond the “emergency mode” and incorporating activism through preventive paths

It is claimed that social workers operate in a reactive state of emergency when they are called to attend situations that have already become critical. Crisis intervention

has become the one of the main domains for social workers to operate in. Being in a constant emergency mode makes it difficult for social workers to be engaged in activism and advocacy. Therefore, social workers should embrace their roles as proactive leaders taking into consideration the intersectionality of issues. Social work should find ways to mobilize and engage people in activism, partly by recognizing the influence of social media or other tools as the communication platform to advance diverse messages (Mahaffey and Hanks, 1982). As the data shows, the use of social media and the techniques of storytelling are the important methods to advocate and be involved in activism and advocacy. For that purpose, they may use every existing mechanism to do so, for example open-door meetings in municipalities, reaching out to communities rather than receiving them in offices. Proactive action will help the profession connect with the grassroots and keep the finger on the pulse of communities. In addition to that, interpersonal and community engagement skills should empower social workers to be the proactive leaders within interdisciplinary settings. As social challenges are complex and intersectional, social workers are well-positioned to understand the oppression people face at different levels, and hence they can take up social leadership roles hand in hand with the communities.

However, the literature shows some pessimistic perspectives on the collaborative social work; it is claimed that within interdisciplinary settings, social work finds it difficult to collaborate with representatives of other professionals due to their unequal power and status (Hudson, 1999). However, social work's value base can also be a unique contribution to the multidisciplinary teams, including a very specific anti-oppressive concept and practice, focus on the social and broader perspectives on issues through person-centered, strength-based approaches (Thompson and Thompson, 2001). These points provide clear areas for demarcation; besides, social work has a promising potential to navigate through different services and do so at the service user's pace (Lymbery, 2006).

## Conclusions

This study was conducted to explore the concepts of radical and critical social work and its relevance to contemporary social work practices. The research aimed to identify the practice methods that effectively incorporate radical social work in relation to social activism and advocacy, investigate the gaps and challenges hindering the boost of radical social work practices, and provide practical implications for social workers.

The multiple case study approach was used to explore the incorporation of radical social work in practice. Three civil society organizations were selected for

the case study, as they were activism- and advocacy-oriented, and had the social service delivery component embedded in their activities. In combination with the case study, expert interviews were applied to provide various perspectives on social activism and advocacy in practice. Overall, a total of 10 respondents were interviewed. The obtained data was analyzed according to the three main categories/themes that were merged with the key characteristics of radical and critical theories in social work.

The data showed that activism and advocacy in selected Polish CSOs is political and collective in nature and practice, the terms “activism” and “advocacy” are used mostly interchangeably, though “advocacy” has a milder connotation implying more possibilities for the cooperation and collaboration. In its very essence, activism and advocacy are conceptualized by respondents as challenging the power structures and changing the power dynamic. In the context of Poland and the selected CSOs, it involved being in opposition to the government and the Catholic Church. Addressing structural injustices is consistent with the radical and critical theories informing social work practices, therefore the implication and recommendation for social workers should be to destigmatize politics in the field of social work by encouraging the political participation of professionals (1), modifying the educational systems where social policy is taught in relation to social work practice fields (2), and encouraging the reflexive practices of practitioners in relation to political power dynamics through external and less biased supervision models.

The data analysis suggested that social activism and advocacy were perceived as intersectional and complex, therefore our respondents emphasized the importance of collaboration and cooperation with different actors in the field. Besides, the investigated grassroots organizations apply innovative and flexible ways to mobilize the communities and engage people in social movements, which is in line with the main characteristics of CSOs discussed in the beginning, namely authenticity and closeness to people (Ferguson and Woodward, 2009). The specific recommendation to social workers entails cooperation with grassroots movements, which will allow practitioners to return to the grassroots and incorporate authenticity in their practice. Creating the spaces for communities to share their individual and collective experience, encourage the collective spirit, and take social leadership role together with the communities, was also suggested for social workers to better incorporate the ideas of activism and advocacy in practice.

The main hindrances for the respondents to realize the radical approaches in practice were attributed to financial limitations, burn-out syndrome, and long-term results of the conducted activities. As these challenges are not novel to social workers, they should address them jointly and in cooperation with the CSOs. Professional associations of social workers should encourage collective action of social work community, while also proposing advocacy initiatives or protesting the poor working

conditions in their workplaces, which do not allow them to be more engaged in civic activities. Collective action of professional social workers might reframe the radicalism of contemporary social work practices. The use of different wording instead of radical social work, has also come up in the data collection and analysis. While words and images have the power to impact the way social work is understood and practiced, various words can be and, in fact, are used to discuss the critical nature of the profession. As in the study conducted by Morgaine (2014), in which one of the participants noted, “Once we lose touch with social justice, we kind of lose touch with what we are actually supposed to be doing” (Morgaine, 2014, p. 2). It is important to constantly emphasize the spirit of activism and social justice, while providing clear practical guidance for social work practices.

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## Streszczenie

### **Radykalne i krytyczne podejście we współczesnej pracy socjalnej: przypadki aktywizmu i praktyk zorientowanych na rzecznictwo w wybranych polskich organizacjach społeczeństwa obywatelskiego**

Pracownicy socjalni często odnoszą się do idei sprawiedliwości społecznej i przewyższania ucisku, jako jednej z podstawowych wartości tego zawodu, stanowiącej imperatyw etyczny. Takie stwierdzenia są podkreślane w różnych dokumentach dotyczących tego zawodu, zarówno na poziomie globalnym, jak i lokalnym. Podczas gdy wielu pracowników opieki społecznej jest zaangażowanych w niestrudzoną walkę z nierównościami i uciskiem, przedstawione badania próbują podważyć profesjonalne określenia, które często wydają się oczywiste, lecz nie wiadomo w jaki sposób są rozumiane i włączane w codzienną praktykę. W dzisiejszych czasach, gdy w wielu kontekstach praca socjalna jest prowadzona przede wszystkim w instytucjach państwowych, koncepcje korzyści z radykalnych i krytycznych strategii pracy socjalnej dla bezpośredniej praktyki, wydają się zbyt teoretyczne lub problematyczne we wdrożeniu. Słowa takie jak sprawiedliwość społeczna i ucisk wydają się nieistotne dla decydentów, a radykalne i krytyczne podejście w dziedzinie pracy socjalnej wydaje się być tylko nośnym hasłem. Z tego powodu w badania wykonane w Polsce dotyczące koncepcji radykalnych i krytycznych podejść we współczesnej pracy socjalnej, poprzez analizę aktywizmu i praktyk wspierających, w polskich organizacjach społeczeństwa obywatelskiego, są traktowane jako terenu implementacji wartości w sferze praktyki. Stosując metodologię studium przypadku, obserwacji terenowych, pogłębionych wywiadów z działaczami i pracownikami socjalnymi, badanie zawiera także rekomendacje dotyczące przyszłych praktyk pracy socjalnej, aby aspirujących aby łączyć zawód pracownika socjalnego z idea sprawiedliwości społecznej.

**Słowa kluczowe:** krytyczna praca socjalna, aktywizm społeczny, rzecznictwo, społeczeństwo obywatelskie, ruchy społeczne, organizacje pozarządowe, studium przypadku, Europa Wschodnia, Polska, postsocjalistyczna praca socjalna

## Exploring the Role of Narratives in Online Advocacy Work: Lessons Learned for Social Work Professionals

### **Abstract**

This article explores the intersection of social work, social media, and advocacy, specifically the use of narratives in online advocacy campaigns. Using a variety of methods, the study questioned NGOs, storytellers, and audiences on how they see the role of narratives as used in online advocacy campaigns. This article hopes to discuss if social media are used as a tool to correct the lacunas of past advocacy initiatives, namely, to empower storytellers. It will examine if e-advocacy is an empowering experience and if social media have permitted campaigns to include more diverse voices. In doing so, this article aims to contribute to a better understanding of the current trends in e-advocacy work and the role of social workers in this increasingly technologized field.

**Keywords:** advocacy, social media, narratives, social work

### **Introduction: aim of the research**

According to Guo et al., “technology has significantly changed the landscape of social work practice, and perhaps no area has been impacted more over the past decade than community organizing and policy advocacy. Social media platforms dominate discussions of online advocacy because of their ease of use and abilities to tap into peer-to-peer networks to spread advocacy messages” (2015, p. 154). It is important for social work to understand the rapid changes in which our social interactions, relationships, and opinions are evolving and being influenced by social media. While a large part of academic discussions around social media have tended to focus on their many organizational and ethical considerations, social media however, also provide many opportunities for innovation and these aspects of the technology also merit social work’s attention. Social media’s ability to reach across geographic and social barriers, to reach broad audiences and isolated populations,

makes them a powerful tool for those who aim to influence public opinion or raise awareness of social causes. Social workers' concern for the value and promotion of social justice, as well as the representation of marginalized and oppressed voices, makes social media an important and, I should argue, heavily underutilized tool. Social media are a tool that can serve to amplify voices, mobilize support, and foster community connections both online and offline (Curnew and Sitter, 2016). Goldkind and Wolf aptly state, "Technology has altered each component of the social work equation: redrawing the human environment, altering our notions of self, and profoundly unsettling the fit of individual into context. Change of this transformative magnitude has to be pursued, researched, and accommodated by the discipline at every level—micro, mezzo, and macro—across the broad range of practice contexts" (2016, p. 100).

This research had two main interests. The first interest was the narrative element. Advocates of various issues have long used narratives as an efficient tool in their campaigns. Narratives are effective means of communicating simply understood message, while connecting audiences emotionally to a cause or a distant 'other' (Hofhuis, 2016; Jung et al., 2016). In clinical work, narrative therapy has been used as a powerful tool to empower service users and help them 'reauthor' their identities and perspectives (Altenberger and MacKay, 2008). This paper hopes to explore whether these two beneficial uses of narratives are coexisting in the development of advocacy campaigns. In other words, do storytellers perceive their participation in social justice campaigns as empowering? Using an empowerment framework, this research wishes to explore how e-advocacy is impacting those who share their stories, as well as how e-advocates create campaigns.

Social media is the other aspect this research explored. Previous transnational advocacy campaigns have been criticized for their irresponsible and unidimensional representation of the people they aim to support. Simplistic narrations and unidirectional media flow contributed to the limited, and at times skewed, representation of 'others' (Madianou, 2013; Pallas, 2016). Social media distinguish themselves from the previous forms of media as a unique platform that enables dialogue or multilogue. With their emphasis on multiple user content and multidirectional communication flows, online advocacy campaigns have the possibility to create a continued multilogue. This multilogue can feature multiple voices which, as a result, have the potential to create more empowering and responsible campaigns. This gives online advocacy the potential to go beyond a mere presentation of simple narratives, towards discussions and debates, thus enabling the engagement of both those represented and the audience. This paper will discuss if social media are used as a tool to respond to the criticisms of past advocacy initiatives.

## **Theoretical background and research context**

### **The development and conceptualization of empowerment**

Empowerment is a notion that places the service users in the center of the intervention, often with a positive strength-based approach. While empowerment is a difficult concept to define, it is equally difficult to objectively measure. Successful interventions that increase the wellbeing or social situation of a service user does not necessarily equate with empowering the service users. Likewise, interventions that are service-user-led may be empowering even if they did not achieve their initial objectives. For this reason, this research turned to two of the pioneers of empowerment discourse, Barbara Solomon (1976) and Paulo Freire (Ambrose J. et al., 2015), to conceptualize empowerment. By evaluating the role of the service users in the campaign's organization, how the stories are collected, written, published and shared, gives an idea on how involved the service users are in the process and what degree of power they exercise. In order to operationalize empowerment, this research also looked at three main aspects. The first of them was the storytellers' subjective feeling of whether they saw themselves as actors of change in their community as a result of the campaign. This aspect was key to both Freire's and Solomon's conceptualization of empowerment. The second element examined in the study was the changes in the role of the storytellers in their community. To do this, the research examined if the people sharing their story had previous experience as activists, as well as if they continue to show involvement in the advocacy campaign or in similar activities. Lastly, the research explored what new tools, knowledge, or skills the campaign uses to equip its participants to develop empowerment.

### **The increasing focus of empowerment throughout the history of advocacy**

Like many social work values and practices, organized advocacy work can be traced back to the works of religious groups. Writing about transnational advocacy, De Waal (2016), discusses the development of advocacy in representing distant 'others' and marginalized populations. He suggests that the first major advocacy works came from the religious movements whose principle interest in the campaigns were not their own material benefit, but rather based on their humanitarian and religious values. He suggests that the first major instance of organized transnational advocacy was the English Quakers' campaign to end slavery in the Americas and the British Empire. This model based on humanitarian and religious values would remain the standard form of advocacy for much of history. It suggested that privileged and educated groups have a moral obligation to pressure their governments or representatives to act to improve the situations of poorer and powerless groups.

In the 20<sup>th</sup> century, with many non-western countries gaining independence and recognizing the value of self-determination, advocacy movements began to change

accordingly. The new generation of advocacy movements saw the importance of having local populations express their own goals and methods of achieving independence and combat exploitation. In contrast to the previous advocacy actions, these advocacy movements prioritized a stronger local and empowered population, emphasizing self-determination and power over the involvement of other governments and western institutions. De Waal claims that these anti-colonial solidarity movements peaked in the 1970s with mass movements against the Vietnam War and with independence gained by many African and South Asian countries. While the anti-colonial solidarity movements still depended on the sympathies of foreign populations, they permitted an increasing possibility for the empowerment of local populations to define the objectives and means of their campaigns. This movement of actions and communication between ‘northern’ advocates and ‘southern’ advocates or from local-global-local have become what advocacy literature refers to as the boomerang model (Pallas, 2017; Keck and Sikkink, 1998).

This model has been important in studying and understanding the dynamic power relationships that form between local and foreign NGOs during their collaboration. The questions of agenda setting, chosen strategies, indicators, and evaluation are the most common areas studied when examining power dynamics in NGO advocacy. Since its appearance, other theorists have also suggested the existence of the inverted boomerang model (Pallas, 2017), where international (northern) NGOs recruit local (southern) NGOs for partner projects in which their role is to increase the visibility and legitimacy of international NGOs or their political agenda.

Yet another transition in advocacy came about in the 1990s (De Wall, 2016). Following the decolonization movements, the international community was left struggling between two core values. On the one hand, the concept of human rights began to gain traction as a universally applicable concept; on the other, so did the importance of state sovereignty and governments’ right to self-determination. While international governments were becoming aware of the abuses of power and corruption of some of the newly freed states, they were hesitant to intervene for fear of infringing on the states’ sovereignty. De Waal describes this era of advocacy as the “anti-atrocity era” (2016). Contrary to the previous models of advocacy which aimed at strengthening governments, the anti-atrocity movements responded to the human rights abuses and invasiveness of the local governments and their institutions. The campaigns placed an increased emphasis on empowering people rather than governments. Exposing human atrocities and the ineptitude of local institutions to respond to the crises, advocacy campaigns began to utilize a tactic of “mobilizing shame” or “leveraging hypocrisies” (DeWaal, 2016). These campaigns did not aim for direct intervention from colonial or local governments but rather aimed to educate and solicit the sympathies of foreign people. This change was also accompanied by an expansion of the concept of rights. Advocacy groups

no longer militated for civic and political rights only but also for a diverse range of other privileges including economic, cultural, and social rights (de Waal, 2016). With this expansion, NGOs and advocacy groups began to specialize in specific areas and causes (famine, gender rights, etc.). The specialization of advocacy, in combination with globalization and the recognition of private corporate responsibility in respecting human rights, led to a multiplication of advocacy venues. Interventions towards local governments, foreign governments and international organizations or international populations each required different skills and strategies to be effective in exacting change. Advocacy work during this period starts to require an increasingly specific skill set, of communication and lobbying skills as well as resources. This push towards semi-professionalization of advocacy work has unintentionally created a barrier for some individuals and communities who lack the resources, access, and skills to effectively advocate for their own community.

Today, advocacy work continues to develop in many ways. One of the more interesting changes is the development of advocacy online using social media. As discussed earlier, many of the advancements in advocacy work throughout history have led to an increasing consideration of the local populations. Theoretically, e-advocacy, using social media, has the potential to continue the empowerment project and the push towards greater participation of local populations in advocacy campaigns, counteracting the perverse effects of professionalization. Social media platforms dominate discussions of online advocacy because of their ease of use and abilities to tap into peer-to-peer networks to spread advocacy messages (Guo et al., 2015). The low cost, most often free, social media accounts, as well as the relatively simple interface means that large campaigns can be achieved by organizations/collectives with very little means and resources. This in turn allows for a multiplication of campaigns with diverse perspectives and causes. No longer is the field of advocacy dominated by a few well-financed and networked NGOs.

Some academics suggest that we are moving towards what Chouliaraki (2010) termed the “post-humanitarianism” advocacy era. Older atrocity era campaigns that relied heavily on emotional content and shock value have taken their toll on their audiences. The combination of the multiplication of social justice campaigns and the ever-present social media has been responsible, at least in part, for the compassion fatigue that plagues social justice campaigns. As a result, post-humanitarianism is distinguished by a “de-emotionalization” of campaigns as well as a “technologization of action,” referring to the simplification of involvement and call-to-action, sometimes popularly referred to as “clicktivism.” Madianou (2013) claims that in post-humanitarian campaigns, the focus lies less on understanding the issues in the campaign than an introspection of the members of the public themselves. Discussions around post-humanitarian campaigns therefore, center less on the narrative of the represented population, but rather on how these campaigns are utilized to contribute to part of the online identity, or narrative, of those who interact

(‘reshare,’ or ‘like’) with it. Understanding how individuals and groups curate their online identity is still a developing area for many theorists and researchers. The implications of these newly evolving theories will no doubt continue to influence our understanding of how and why e-advocacy campaigns are shared online but also the potential impact the campaigns can have on the audiences as well as the campaign contributors.

### Using narratives in intervention and advocacy

A narrative or a story in its simplest form is a series of events placed in a sequence over a period of time containing a flow or a plot (Morgan, 2008). In social work, narratives have long been used as a therapeutic tool to aid the individual or community, to self-reflect, create coherency and meaning through life events, often emphasizing or strengthening certain identities and events over others. In this way, one of the desires of narrative therapy is to illicit a reaction in the storyteller themselves. However, the principal application of narratives in advocacy work has typically been more concerned with the response from the audience, rather than the storyteller. Personal narratives have the ability to elicit emotional responses in the audience, strengthening the sense of solidarity, and the impact of the message. This allows others, who may be quite different and distant, to be able to connect to a cause in which they would otherwise not be able to relate to. This capacity to create emotions, or pathos, along with ethos (credibility or character) and *logos* (logic) form the three key elements in the art of persuasion in rhetoric dating back to Aristotle (Porter, 2014). By emphasizing the human commonalities, narratives can draw on the power of the audience’s emotions to solicit action for a cause. In this way narrative stories are particularly interesting tools in regards to international or cross-cultural advocacy, as they permit the narrator to share small aspects of their culture and daily lives with the audience that is often distant and poorly informed, all the while emphasizing the commonalities of human emotions. “There would be no activism without emotion. No humanitarianism or progressive politics without the emotion of outrage, sympathy, empathy and the personal fulfillment that comes through acts of kindness and solidarity” (Ambrose et al., 2015, p. 18). In addition to the emotional aspect of narratives, stories tend to use only selected events, often in a linear fashion. Because of this, they have the ability to present a comprehensible narrative of an otherwise complex situation. Not only would an empathetic response from the audience be hindered by a complex story, but simple stories allow the audience to retain the one or two key messages of the campaign without much effort. A final advantage, narrative can be communicated using a variety of media: written, audio, visual, video etc. Autobiographical books, documentaries, blogs (or vlogs) and in some ways even social media profiles all have the potential to relate narrative or stories to an audience.



Narratives used in social justice campaigns are, however, not without their caveats. While campaigns put forward one story that may be exemplary of a social justice issue, doing so risks oversimplifying a complex situation in which there is no easy solution. Similarly, when campaigns only present one or two voices of the many that may be affected by the issue, they ignore the multitude of other voices in the community. Solutions meant to respond to the needs of the community may in fact only respond to the needs of the few included in the campaign. If the issues, as presented by the narratives in the campaign, are too narrow or simplified the solutions may not consider other intersectionalities or address the globality of the situation. Over the years, there has been a growing concern over how narratives are utilized in social justice campaigns, how narratives can be used to unwittingly create a one-dimensional characteristic of those who it seek to help. While they may be initially meant to create understanding and relatability, they can lead to creating misunderstandings and stereotypes whose consequences are long-lasting (Madianou, 2013).

### **Methodology and research description**

To answer the research question as thoroughly as possible, this project explored the issue from several perspectives. Employing several data collection techniques permitted a richer portrait of social work e-advocacy to be made.

### **Getting outsiders' and insiders' perspectives**

The first means of data collection used in this research was an online questionnaire with examples of e-advocacy campaigns using narratives. The questionnaire was designed to obtain some feedback regarding the effectiveness of stories in online campaigns, as well as to collect a few details on how viewers evaluate the narratives including what kinds of details they consider important. The questionnaire was posted on several social media sites available internationally from the researcher's profile. Due to this, it is likely that the majority of respondents come from social work related professions. However, as personal data was not collected, it is impossible to verify the above assumption. The questionnaire was open to anyone who had obtained the link and remained open for 30 days.

In order to understand the creation process and the ethical considerations that go into creating social justice e-campaigns, it was important for the researcher to include the voices of the social workers and advocates who created the campaigns. Informal, semi-structured interviews were therefore conducted individually with 2 NGOs in Poland and 1 NGO in Canada. The discussions during the interviews aimed to explore:

- How are the campaigns and narratives being designed and created?
- What impacts do advocates believe the campaigns have on the public and storytellers?

- How do NGOs perceive the empowerment of campaign storytellers?
- What are the perceived obstacles, concerns and lessons learned by the advocates?

The majority of narratives used by these organizations were text-based, first person narratives that are accompanied with a single portrait of the narrator(s) but also included several other media such as videos and soundbites. The narrators of the stories share events from their personal experience but also reflect on the larger political or social situations.

### **Storytellers**

In a study that aims to explore the empowerment of participants it was essential that the research also contain content from people who had participated in the advocacy campaigns by contributing their stories. Semi-structured interviews were also conducted with two couples who had shared their story with an e-advocacy campaign. The topics discussed in these interviews were:

- Exploring storytellers' advocacy experiences prior to and after their participation in the campaign.
- Feeling of empowerment throughout the process.

### **Results from the research What audiences think**

Overall, those who responded to the questionnaires found the e-advocacy campaigns examples to be generally positive. However, some respondents expressed concern over the ability of such campaigns to effectively treat ethical issues, particularly the need to balance the need to represent diversity while being inclusive and accepting all of those who wish to participate. Another respondent expressed concern over social media algorithms affecting the ability of the campaigns to reach new audiences on whom the campaign may have a persuasive impact.

### **NGO & storytellers**

The two central issues that this study aimed to explore with the storytellers and NGOs were:

- 1) The possible empowerment or therapeutic impact for storytellers of campaigns through the development and use of personal narratives.
- 2) Whether or not social media permit advocacy campaigns to present more complete and diverse narratives through increased engagement and discussion.

Recalling what was discussed in the framework of this study, empowerment was conceived as having three central indicators, a subjective feeling of being

empowered and having control over one's story; an increased role of leadership in the community or activism; and, lastly, the development of new skills or knowledge. It would appear that both NGOs and storytellers seem to agree that the storytellers are, for the most part, well informed and generally empowered prior to participating in the campaigns. The storytellers are seen as having a good level of social and financial capital which permits them to feel comfortable enough to participate in the campaigns. They generally have previous experience in leadership or activist roles in the community. Both NGO and storyteller respondents seem to agree that they have little control over the story as it is shared on social media and the reaction the stories receive. They acknowledge the risk of their story attracting injurious comments and trolls. Despite this, storytellers do not seem too negatively affected, as they appear to have adopted a perspective that permits a distance between themselves and the potential injurious comments. While many would point out that the distance and anonymity of social media is exactly what allows trolls and their hateful comments to proliferate online (Levmore, 2010), it is also possible that this anonymity and distance allows storytellers to feel secure and safe, therefore permitting them to share their story. As one storyteller mentions, this anonymity may not be possible in campaigns that take place in smaller communities. All respondents prefer to believe that the negative comments and shares have little impact on them personally in real life. It would seem that there is a certain acceptance of malicious comments and trolls as an inevitable part of social media and therefore the social media campaigns. When asked if they received any negative comments due to their role in the campaign, one storyteller responded: "I would say not more than you would expect...they [the negative comments] were from people we had no idea who they were, and you do not really know if they are trolls. So you do not put much emotion into Facebook comments."

For the NGO informants, it was generally assumed that the campaigns did not have a large impact on storytellers beyond the threat of being exposed to trolls, in which case the online identity of the storytellers was a major concern for the NGOs. Two NGOs mentioned that it is very unlikely that storytellers face hostilities or dangers in real life due to online activities. It was assumed by the NGOs that those who do not wish to participate do so because their vulnerability places them at more risk of real-life dangers (loss of work, relationships etc.).

In response to the second inquiry, the results of the study found that advocacy campaigners from NGOs are increasingly aware and concerned about the diversity within their campaigns. They are aware of the how the narratives used in their campaigns contribute to the overall representation of their service users/storytellers in the media and greater society. As such, campaigns are often designed to include a greater diversity of people and perspectives but do not use social media to continue to foster this diversity.

### **Discussion: diversification of voices**

The NGO informants appear to agree with the literature in having similar concerns for diversity of social media advocacy campaigns. Numerous researchers discuss the role of social media in permitting smaller NGOs with less financial resources to have access to a platform to promote their causes adding to a multiplication of advocacy campaigns with a variety of aims and perspectives (Guo and Saxton, 2018b; Gupta, et al., 2018). The NGO informants participating in this study perceive themselves as the examples of this diversity. Two of the organizations considered advocacy work as outside of their strict organizational mandate, yet they decided to take on the campaign as they felt that the campaign would be a voice that has been lacking in other campaigns in the field. All NGOs interviewed confirm that they have little means to conduct the campaigns and have no permanent team devoted to such advocacy work. None of the organizations had previous experience with advocacy campaigns pre-social media era and therefore could not respond on how social media has influenced the practice of advocacy. The availability and the perceived effectiveness of social media tools do appear to contribute to the NGOs expanding the limits of their organizations work to include advocacy.

Previous studies warn of the possible negative impacts that this diversification and increased accessibility to social media platforms could have on e-advocacy. E-advocates must compete with other campaigns and a large amount of online 'noise' to be heard by their target audience (Guo and Saxton 2018b; Saffer and Yang, 2018). In her work, Birgitta Höijer (2004) discusses the role of NGO campaigns and media in the development of 'compassion fatigue' leading to inaction and indifference. Both informants who responded to the questionnaire as well as the NGOs believed that social media advocacy does cause a certain level of desensitization to issues. Those who responded to the questionnaire mention the feeling of being bombarded by advocacy campaigns on social media.

Many of the NGO informants mention a concern for representing diversity within their own campaign. Some NGO informants cited that the need of their campaign to include diverse participants would help a wider diversity of people to relate to the campaign and therefore increase the effectiveness and reach. This experience is also confirmed by studies on narratives in advocacy campaigns as a means of connecting to audiences (Jung et al. 2016; Höijer, 2004). While other NGO informants desired diversity as they were concerned over the simplification of the social issues by only presenting one type of narrative. One informant in particular was concerned with how the public perception of the represented community would be impacted if only one type of narrative was presented.

Of course, they [the community represented in the campaign] understand that our mission is to stress the problem so as to put some light on the problem, but by publishing these articles we can make the situation worse. ... We had somehow created the image of women as being poor victims in the situation.

This respondent went on to discuss their concern for having storytellers from diverse backgrounds but also narratives from a variety of perspectives as a means to present the multiple angles and complexities of the social situation which the campaign wishes to address. The respondent's concerns in this regard are justified and supported by the literature (Gupta et al., 2018; Madianou, 2013), which suggests that narratives are effective tools in simplifying complex issues, as they selectively highlight certain aspects while ignoring others as a means to influence the audience's opinions. Whether purposeful or accidental, this can result in the campaign narrative creating a biased or incomplete portrait of the situation.

Given the NGOs' concern for diverse narratives in their campaigns, many make special efforts to ensure that their campaigns are representative of specific populations. All NGOs admit that they struggle to ensure their campaigns represents a diversity of voices from a wide range of perspectives, while also mentioning difficulties in recruiting voices from the more marginalized communities. There are a couple possible explanations for the difficulty in reaching diverse populations. The first explanation, as discussed by one of the NGO informants, is the campaign storytellers generally need to have a certain amount of capital (social and economic) before they can think of participating in a social media campaign. All the NGO informants mention that in general the majority of their storytellers have some financial comfort and some previous activist experience prior to contributing to the campaign. Potential storytellers coming from more marginalized communities may lack the necessary capital to participate. They may lack the emotional or physical energy and the time required by such campaigns. One LGBTQ rights organization, for instance, hypothesized that those from more marginalized communities faced greater risk of losing their job or social networks due to participating in their campaign. The storytellers that did contribute their stories were generally already 'out' to their social networks and had stable secure jobs not at risk should they be identified as a member of the LGBTQ community.

### **The importance of strategic reflection**

Concurrent with the literature (Davis et al., 2016; Dorfman and Gonzalez, 2012; Guo, et al. 2015; Saffer and Yang, 2018), the NGO informants emphasize the need to thoroughly plan targets, means, and measurement for e-advocacy campaigns. Whether it be a call-to-action, education, or awareness-raising, online advocacy techniques necessitate detailed planning and organization to be effective. NGO respondents

tend to echo experts in claiming that campaigns should ideally be designed to ensure that the aims, means, and indicators of the campaign follow a logical progression. Some NGOs mentioned that because social media campaigns were new to the organization or because they were not clearly mentioned in the mandate of the organization, little resources were dedicated to these projects. The respondents mentioned that given more time, resources, and possible access to experienced professionals, their campaigns would likely have a greater impact. While the specific indicators of progress and measures of results differ between campaigns, all the informants (NGOs and storytellers) agree with the literature in stating that objectively measuring or understanding the impact of the campaign is challenging (Hammer et al., 2010; Guo and Saxton, 2018b). Less tangible goals of awareness campaigns and those aimed at fighting stigma are a particular challenge to measure when compared to campaigns that aim to obtain specific policy goals or services for a population. While comparing pre- and post-campaign public opinion surveys and approval ratings can be quite reliable in showing the changes. However, they often lack the ability to show causality between the changes and the campaign. There could be a wide number of variables that influence societal changes besides the campaign (Dorfman and Gonzalez, 2012).

The data sample from the current project confirms the findings of Edwards and Hoefer (2010); Davis et al. (2016), as well as Guo and Saxton (2018a), who found that advocates in NGOs tended to limit their use of social media to only educate or announce. All the campaigns examined in the study used the social media campaigns as a means of raising awareness. Guo & Saxton (2018a), Madianou (2013) and Hofhuis (2016) agree that many NGOs are successful in making use of social media's peer-to-peer networks as a means for disseminating their campaign message. While this is a very important aspect of advocacy and awareness-raising, the same authors critically question if it utilizes web 2.0 technologies to its full potential? Guo and Saxton (2018a), in particular, are critical of NGOs' social media use and found that social media campaigns lack the ability to create discussions, to elicit responses, collect opinions or information from their online community. NGOs did not systematically engage with the comments or shares beyond the deleting of negative comments. In their conclusions Davis et al. attempt to highlight the importance of this by stating,

Negative social media is also a large part in much of Web 2.0 conversations. This situation can severely thwart the proactive efforts of a non-profit by broadcasting a competing message. It is not an overstatement to suggest that the success of future signature events may depend on how well non-profits engage with the digital community via social media and how well they can moderate, mediate, and influence the direction of commentary online. Either way, their presence in online conversations is mandatory... The problem is, if left unanswered, these comments will propagate incorrect information or damaging information. The opportunity is for organizers to use the existence of negative comments

as an opportunity to interact and engage with its target audience. Social media can be used as a tool to guide conversations, responding to negative commentary, confronting stereotypical or stigmatizing discussions, and initiating more positive and productive conversations (2016, p. 269).

Interestingly, storytellers similarly stated that they followed the narrative for only a short period of time but did not necessarily invest time or energy in responding to the comments or interacting with the story.

### **Offline impact of campaigns**

As mentioned in the previous section, the respondents in this study concur with the literature in mentioning that it is difficult to measure with any certainty the impact of social media advocacy campaigns. This is especially true when the aims of the campaign are to influence public opinion and stigmas such as these changes could happen over long periods of time and may involve many variables. Neither the literature reviewed, nor the respondents make any mention of evaluating how storytellers were impacted by the campaigns. Despite the difficulty in measuring the impact of the campaign on the general population or target population, it would be conceivably easier to measure the impact of the campaign on the lives of the storytellers. None of the organizations, however, had considered storytellers as possible informants in the evaluation process of the campaign. Incorporating storyteller feedback in the evaluation of the campaign may not be able to clearly indicate the success of the campaigns ability to influence public opinion, it could nonetheless, shed light on how the campaign has impacted the lives of the population it aims to represent. A lot of social work literature typically places emphasis on the importance of keeping the storytellers at the center of our interventions. As such, some of the literature reviewed did mention the importance of keeping 'stakeholders' involved throughout the campaign process (Saffer and Yang, 2018; Curnew and Sitter 2016), however they made no mention of involving storytellers in the evaluation process either as informants or as consultants in evaluation design and measurement.

### **Recommendations Suggestions for the social work profession**

Media literacy and digital skills are more and more in demand by employers in many fields, to the point of being quasi-essential in certain domains such as advocacy. There is an impressive amount of social work literature discussing the ethical questions of consent, double relationships and privacy in social media (Bogo et al., 2014). It is felt, however, that concrete technical skills and tools are less present

in social work education (Goldkind and Wolf, 2016). This may be due to the fact that social media are still seen as a novel space of intervention, and best-practices may have not yet been identified. It may also be due to the assumption that younger generations of social workers are ‘digital natives,’ and are thought to have an inherent understanding of social media from personal experience. However, NGO respondents in the study briefly mentioned their lack of confidence and limited experience with the online tools, often seeking more experienced partners. Considering this, there are important elements that schools of social work could include in curriculum for new social workers and advocates. Social work courses that already focus on communication could be enhanced by incorporating concepts of digital communication. Such courses should go beyond writing professional emails and non-verbal communication to include aspects of advocacy, community building in online communities. By doing so, the social work professionals could greatly increase their impact as practitioners by developing such digital communication and technical skills.

It is also important that we as professionals recognize the limits to our knowledge and skills. In such cases it is felt that social workers need to continue their efforts to collaborate with specifically skilled partners such as those in the field of communications or technology. Social workers have a long history of collaborating with those in the health, social, and political fields. Our similar interest and knowledge base can facilitate collaboration. Going forward, as social workers develop collaborations with new professionals in a variety of private information technology and communication fields, it is important that social workers do not lose sight of the core values and objectives, such as keeping the service user at the heart of our interventions. From the experiences mentioned by the NGO respondents in this study, collaboration with the partners in other fields is not always simple. It is important that social workers navigate potential differences in motives, values, and objectives between their organization and that of their partners. While recognizing the value these collaborations bring to advocacy campaigns by aiding the campaigns to establish large reach and commercial success, it is important for social workers to continually represent the best interest of the vulnerable populations or storytellers. It is important that social workers do not sacrifice the voices of the represented population in an attempt of gaining greater reach or more likes. In their commentary, Goldkind and Wolf skillfully and succinctly say,

[al]though technological innovation continuously alters the landscape of human possibility, it does not guarantee momentum toward the values of social justice. Social work is both uniquely positioned and ethically obligated to ensure that the drive of technological evolution is a project open to all, and that it does not replicate or amplify existing inequalities (2014, p. 85).



### Suggestions for advocacy organizations

At the organizational level, the findings of the study suggest that there is a need to consider the space and resources we attribute to advocacy work in fulfilling organizational mandates. Despite the central role advocacy plays in the definition of social work and the profession's values, our frontline organizations and institutions seem to place little importance or attention to community or societal level advocacy. Given the scant resources and limited means to evaluate and prove the efficiency of advocacy campaigns, advocacy and civic engagement are often perceived as non-essential services (Goldkind, 2014). As mentioned in the research, no organization interviewed was able to find the resources to establish a permanent advocacy team or committee. To fill the gaps that other organizations were not responding to, ad hoc campaigns were created with limited resources and time. If organizations truly adhere to the definition and values of social work as expressed by our representing bodies, our organizations need to reappropriate community and societal level advocacy work in our institutions. Dedicating adequate time and resources to these advocacy departments not only increases the chances that our campaigns will be effective it also permits the campaigns to develop more responsible and ethically. Given proper resources, campaigns could adequately work with the communities they represent, incorporating peoples' needs, ideas, and efforts more successfully into all aspects of the campaign.

One of the difficulties that the NGOs which participated in this research mentioned was the difficulty they encountered in their attempts to recruit storytellers from marginalized communities. The findings of this study suggest that people from marginalized communities may be lacking certain resources or capital that would place them in a position to contribute to the campaigns. If we accept this interpretation, then advocacy campaigns should not be conceived as stand-alone projects rather they need to start incorporating workshops or empowerment concepts in these communities prior to recruitment efforts. Empowering community members and helping them see themselves as actors of change would, theoretically, increase the chances that they will be willing and able to collaborate on advocacy campaign.

While it may have been a particularity of the study's specific sample, the organization that developed the campaigns provided little or no front-line services to the affected populations. While the organizations were highly informed and knowledgeable about the issues, they had only punctual contact with service users (storytellers), mostly through networking and the occasional workshop. They were slightly removed from the people they sought to represent as they did not provide continual direct services to these populations. It could be suggested that organizations or institutions that provide direct services and have more continuous direct contact with the community should take on a larger leadership

role in the advocacy campaigns. If front-line organizations were to take on a greater role in these campaigns, it would likely increase the perceived legitimacy of the campaign. More importantly, as front-line organizations have frequent and direct contact with service users and have generally built up trusting relationships with the community, their ability to recruit storytellers from more marginalized communities will likely be more effective. Of course, professional ethics dictate that essential services should never be considered dependent on a service users' participation or not in such a campaign. Service users should also be presented with multiple possibilities to participate in the campaign, beyond only sharing their narratives. Hopefully, bringing advocacy work to front line organizations will contribute to conceiving social work intervention with clients and advocacy work are one and the same, rather than two separate areas of social work that compete for resources.

A final suggestion for the organizations that perform advocacy online would be the necessity to find means for engaging storytellers, followers, and the general public on social media, beyond and between social media campaigns. This is a suggestion that has been made by numerous other authors (Bessi et al., 2017; Caba-Pérez et al., 2018; Chun et al., 2014; Curnew and Sitter, 2016; Guo et al., 2015; Olinski and Szamrowski, 2018). While the NGO respondents in this study claim to make regular use of social media for sharing their campaigns and disseminating information their participation with comments posted to the campaign were limited to deleting negative/hurtful comments. Social media presence goes beyond networking and dissemination of information. Rather, it is suggested that advocates need to find ways to advance the conversation by engaging with the comments of followers and detractors alike. Doing so increases online visibility (Madianou, 2013), allows false information to be debunked (Bessi et al., 2017), and facilitates the monitoring and shaping of the online discussion (Guo et al., 2015; Caba-Pérez et al., 2018).

### **Wider discussions of social work's engagement in e-advocacy**

Expanding beyond the scope of this project, there are some concerning trends in the field of advocacy work that should be addressed. The increasing professionalization and restricted practice of advocacy is one such trend. There may have been a short window of time when social media was full of promise in its ability to afford grassroots, less-financed NGOs an access to influence public opinion and stakeholders. That hope, however, has been withering with the realization that larger NGOs still maintain greater access to stakeholders, decision-makers, and have greater influence on public opinion (Yang and Saffer, 2018). While the professionalization of advocacy work suggests that there will be an increase in the effectiveness and more systematic and considered ethical standards, it is reasonable to question: at what cost? Is the price of these advancements the exclusion of service user voices and

opinions? Is the professionalization of advocacy relegating smaller grassroots NGOs and service users to limited consultative roles who only punctually participate in the campaigns when it is strategically appropriate? These questions are also linked to the, at times, conflicting values of social work. As professionals, social workers are required to be knowledgeable and efficient. Our user-centric perspective and value of empowerment, however, dictate that we should support the service users with *their* solutions. This, at times, may seem like a slower process and a challenge to the traditional/bureaucratic conception of efficiency. Finding a convergence between social work's value of professionalism and our value of empowerment of service users, remains a challenge in the advocacy field especially while collaborating with many different actors; service users, IT consultants, politicians etc. Social workers need to continue to carve out a clear role for us to play among all these actors.

As previously discussed, digital literacy and skills are an increasingly important skill for new social workers; however, there is equally the necessity to work on closing the digital divide that has been documented across the different generations of social workers as well as regions. This digital divide has been caused by the unequal access to, and experience with, technological resources, as well as uneven development of infrastructures (Goldkind and Wolf, 2016). There is the possibility of a rich collaboration between social workers of different generations. Older generations of social workers who have extensive knowledge and experience in advocacy and community building could greatly inform younger generations of social workers. Newer generations of social workers may then be able to innovatively translate effective pre-digital advocacy methods, means, and tools into the internet era.

There remains much to be explored in the fields of social work, social media, and advocacy. While this study does give us a small glimpse into how storytellers feel about their narratives being online, the real-life impact of these stories on the audience is still largely unknown. Further research into online identity creation is also merited if we are to increase our understanding of the post-humanistic trends in advocacy work. With this understanding, we will be able to hopefully create more engaging campaigns and combat the negative effects of 'clicktivism.' More research and understanding of the phenomena of trolling and cyberbullying is also needed if NGOs are to actively engage online communities.

The larger socio-political environment must also be acknowledged. While this paper may be advocating for social workers to consider greater digital literacy and more service user engagement in online spaces, there is also a larger discussion at many levels, discussing the importance of neutrality and the possibility of regulation of social media and internet providers. Recognizing the huge potential and influence social media has, people and governments all over the world are attempting to hold GAFAs (acronym for Google, Amazon, Facebook, Apple) and other major tech companies responsible for regulating public generated content on their platforms as well as questioning confidentiality and security issues. GAFAs representatives,

on the other hand, argue that governments are the ones with legitimate authority (through laws and justice systems) to dictate acceptable actions and behavior online as they already do offline (Article19, 2018; Biyere, 2018). While society and governments search for solutions, NGOs and social workers are making headway in their attempts to find ways of advancing social justice causes through debate, all the while maintaining safe places (online and IRL) for those involved. Only time can tell if these initiatives will be enough to redeem the social media space as an efficient and powerful tool for democratic debate and exchanging of ideas it was once considered to be.

### Conclusions

Given the prevalence of social media in society, social works engagement and adoption (or, at bare minimum, an understanding) of these technologies is necessary if we are to remain relevant and effective as a helping profession. It is hoped that this research contributes to the understanding of ways in which social media technology is, or can be, used to counter some of the ethical concerns that have long plagued social justice campaigns. By understanding the role social media play in shaping public opinion and therefore political policy, it is hoped that the profession continues to critically examine how social workers can engage with such tools ethically and responsibly in order to advance social justice while authentically empowering the people with whom we work.

Despite the appreciation of the contribution many non-government organizations make to society, there is still a perception among some that policy advocacy work by NGOs is frequently not sufficiently supported by evidence or lacks in nuance (Hammer et al., 2010). Ethical issues such as transparency (Council of Europe, 2009), accountability, and legitimacy (Crack et al., 2017; Hammer et al., 2010) have compromised their ability to effectively carry out their missions and campaigns. Many academics and studies attempt to inform NGOs and advocates of the many ways in which they can regain public trust and effectively attend to their mission. The findings of this study are coherent with the findings of other studies and literature which state that narratives are perceived as an effective tool for creating legitimacy and relatability in advocacy campaigns. This study demonstrates that NGOs are aware of their ethical responsibility, and as such have started to adopt many 'better practices' when it comes to representation of diverse participants and aim to have more complete (complex) campaign messages. In their introductory chapter on Transnational Advocacy in Contention, Ambrose et al. (2015) discuss one of the central mottos to social work advocacy for the last couple decades, "Nothing for us, without us." Given the findings of this study, as well as a large body of previous studies, it could be suggested that modern advocacy work has perhaps lost sight of what this phrase truly means. While e-advocacy campaigns incorporate

service user and storyteller content (such as narratives, photos, and comments) into campaigns there are still missed opportunities for engagement and empowerment of storytellers. At best, this study indicates that advocates, despite their lack of experience or knowledge, are making efforts to respond to previous criticism and become more representative and ethical. At its worst, the results can be perceived as NGOs adopting altruistic catchphrases regarding empowerment, all the while making only superficial adjustments to their functioning. Either way, more can still be done to work towards greater participant involvement and engagement to make campaigns more effective. Social media resources remain largely underutilized in this regard.

NGO advocates should make more efforts to empower and connect with marginalized and vulnerable populations if they wish to address the issues of legitimate representation. It is hoped that this research contributes to the ever-growing body of literature exploring the subject area, all the while refocusing the conversation around the involvement and empowerment of local communities in the online advocacy campaigns. It is acknowledged that while understanding the larger societal impacts and reach of NGOs' social media campaigns is important, it is equally important to explore the direct impact on those closest to the campaign and to hear the voices of the storytellers.

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## Streszczenie

### Badanie roli narracji w działaniach związanych z rzecznictwem online. Wnioski dla osób zajmujących się pracą socjalną

W artykule omówiono obszar badawczy istniejący na skrzyżowaniu pracy socjalnej, mediów społecznościowych i rzecznictwa, w szczególności analiza narracji w internetowych kampaniach rzeczniczych. Korzystając z różnych metod, w badaniu pytano organizacje pozarządowe i osoby, które mówią o problemach społecznych oraz odbiorców o to, jak postrzegają rolę narracji stosowanej w internetowych kampaniach rzeczniczych. Ten artykuł ma na celu omówienie, czy media społecznościowe są wykorzystywane jako narzędzie do korygowania braków w inicjatywach rzeczniczych z przeszłości, zwłaszcza we wzmacnianiu osób, które opowiadały swoje historie. Zbadane zostało, czy e-rzecznictwo jest wzmacniającym doświadczeniem i czy media społecznościowe dopuszczają kampanie obejmujące bardziej zróżnicowane opinie.

Czyniąc to, tekst ten ma na celu przyczynienie się do lepszego zrozumienia aktualnych trendów w e-rzecznictwie i roli pracowników socjalnych w tej coraz bardziej technologizującej się dziedzinie pracy socjalnej.

**Słowa kluczowe:** rzecznictwo, media społecznościowe, narracje, praca socjalna



## Exploring Social Work Practice in the Area of Social Entrepreneurship

### **Abstract**

Social entrepreneurship has emerged as a potential alternative to be explored and piloted in the recent years. This concept and its organizational form, known as social enterprise, have received much attention from social change deliverers, including social workers who have been coping with the challenges of neo-liberal discourse. This paper explores the congruencies between social work and social entrepreneurship by capturing and gaining insights into social work practice in some specific social enterprise settings. The research shows interconnections and complementarities between social work and social entrepreneurship, suggesting to social workers a potential for collaboration and adoption of social entrepreneurship, without being cautious of the remaining debates around its contested nature and complex formality. Thus, further research should be conducted to explore and affirm which definition, which approaches, and which areas of implementation are suitable to social work profession. Further research is also necessary to discover the insights of particular groups of social-workers-turned-social-entrepreneurs.

**Keywords:** social work, social entrepreneurship, social enterprise, social work practice, social entrepreneur

### **Introduction**

Social entrepreneurship is a relatively new and contentious concept (Choi and Majumdar, 2013; Berzin, 2012; Mair and Marti, 2006; Nicholls, 2006). Its dual identity is characterized by economic activities driving the pursuit of social goals, aimed to ensure social wealth creation for disadvantaged individuals, groups, and communities (Stevens et al., 2015).

There have been debates around the relevance of social entrepreneurship in relation to the social work profession, especially given that both of these two arenas are greatly influenced by neo-liberal discourse. Many commentators argued

that social entrepreneurship appears in liberal economies as the result of welfare reforms, and that it is perceived as a means to reconstruct and restructure social services (Grant, 2008; Mair, 2011; Cook, Dodds and Mitchell, 2003; Ziegler, 2009). Meanwhile, social work has undergone the transformation of decentralization due to the influence of neo-liberalism in the 1980s and onward (Sievers, 2016). This decentralization refers to the gradual withdrawal of the state in services provision; changes in relationships and roles between the state and the voluntary sector; transformation from grants to contracts and shifting priorities in social work from caring and providing welfare to work integration. Many authors therefore concluded that the decentralization developments in social work increased the interest in social entrepreneurship in many countries (Sievers, 2016; Germak and Singh, 2009; Gray et al., 2003). The 20<sup>th</sup> century has seen the development of social enterprises around the world, which were embraced by governments and states globally. In the recent years, one particularly noticeable trend has involved the conversion of social workers into social entrepreneurs.

The literature review reaffirms the potential link between social work and social entrepreneurship (Berzin, 2012; Nandan and Scott, 2013; Gray, Healy and Crofts, 2003). However, social work is still absent from the discussion and definition of social entrepreneurship (Berzin, 2012). There has been little attention paid to the role of social work in the social entrepreneurship movement, since the findings and evidence in this field are scarce (Berzin, 2012; Nandan and Scott, 2013; Gray, Healy and Crofts, 2003). The relevant literature also raises the need to conduct further research on the congruence between social work and social entrepreneurship.

### **Theoretical background and context of the study**

#### **The concept of social entrepreneurship**

Social entrepreneurship has emerged as “an innovative approach for dealing with complex social needs” (Johnson, 2002, p. 1). As a research field, social entrepreneurship is relatively new (Kusa, 2012; Sievers, 2016). This probably explains why there has been a great deal of discussion on what social entrepreneurship actually is (Grenier, 2009; Mason, 2012). The definition of social entrepreneurship varies and very much depends on the adopted focus (Kusa, 2012). For example, when seen through the lens of social policy, social entrepreneurship is viewed as a way of solving social problems, both for those experiencing them and those striving to provide help. In addition, social entrepreneurship is treated as a way to realize the idea of social justice (Seelos and Mair, 2005). In economic terms, social entrepreneurship is considered as an instrument of work mobilization or work reintegration. This is especially relevant when it comes to the support extended to those affected by the actual or potential social exclusion, which is referred to as social economy (Hulgård, 2010; Kusa, 2012). In terms of innovation and effective use of

resources, social entrepreneurs are seen as individuals with commitment to, and initiative in, solving social problems (Mair and Marti, 2006; Martin and Osberg, 2007). The concept of social entrepreneurship may also serve as a development of non-profit management theory and practice (Boschee and McClurg, 2003; Lasprogata and Cotten, 2003).

Social entrepreneurship refers to an 'umbrella concept' including both social entrepreneurs as individuals and social enterprises as organizations (Nicholls, 2006). Social entrepreneurship is therefore a broader term referring to a type of action, while social enterprise is an organizational form that is often viewed as being the result of certain social entrepreneurial activities. Social enterprise is a hybrid organizational form that exists in the intersection between state, market, and civil society, with "an explicit social aim" (Defourny and Nyssens, 2008). A social entrepreneur is the individual who sets up a social enterprise and is generally referred to as a "change maker" (Barendsen and Gardner, 2004; Sharir and Lerner; Shaw and Carter, 2004; Van Slyke and Newman, 2006).

Despite the broad discussions around social entrepreneurship definition, social entrepreneurship is mostly defined as a combination of social and economic value creation, and innovation (Sievers, 2016). Considering this matter, and in order to facilitate the purpose of this research, social entrepreneurship will be defined as: "the creation of a social value that is usually produced in collaboration with people and organizations from civil society who are engaged in social innovations that often implies an economic activity" (Hulgård, 2010, p. 297).

This definition emphasizes the three elements that characterize social entrepreneurship: the creation of social value, economic activity, and social innovation. This definition is also in line with what was proposed by Mair and Marti (2006), who posited that social entrepreneurship can be broadly considered as a process of generating value by combining resources in new ways that are primarily aimed to explore and utilize opportunities for creating social value by stimulating social change or meeting social needs (Mair and Marti, 2006).

In terms of social value creation and economic activity, Dacin et al. (2010) stated that social entrepreneurship actually keeps the balance between both of these missions. Thus, the mission of social value creation does not necessarily contradict or diminish the focus on economic value. In fact, economic value is crucial for the creation of social value. However, it seems that there is a hierarchical order of social and economic value creation. Gray and Crofts (2002) argued that experts on social entrepreneurship embrace the idea that business discernment can be applied in empowering ways to ensure an actual transfer of economic power to disadvantaged individuals and groups. Thus, the main difference between entrepreneurship in the business sector and social entrepreneurship is the relative priority given to social wealth creation versus economic wealth creation (Mair and Marti, 2006). In business entrepreneurship, social wealth is a by-product of the economic value

created (Venkataraman, 1997 cited in Mair and Marti, 2006); in social entrepreneurship, the main focus is on social value creation. However, economic value creation (i.e. earned income) is also important, in order to sustain the initiative and ensure the financial self-sufficiency. In a word, according to Rykaszewski and her colleagues (2013), the social mission is at the core of business, with income-generation playing an important supporting role. Social impact creation has become a more central criterion rather than wealth creation. Economic wealth does not go to social entrepreneurs; it is just a means to an end (Dees, 2001).

In term of social innovation as an element of social entrepreneurship, Mair and Marti (2006) emphasized the importance of social entrepreneur as an individual who initiates the tool to solve social problems. A social entrepreneur's ability to create innovative solutions and utilize business principles in order to stimulate sustainable and high-impact social change is perceived as a competitive advantage (Rykaszewski et al., 2013). Thinking innovatively enables social entrepreneurs to align their mission with concrete outputs.

### **Social entrepreneurship and neo-liberal ideology**

According to Dey (2013, p. 3), social entrepreneurship is somehow “naturally” related to neo-liberalism. Neo-liberalism was defined as “the dominant ideology shaping our world today” (Saad-Filho and Johnston, 2005, p. 1), which has been treated as a prevailing trend globally (Thorsen and Lie, 2007). It has also been perceived as a set of ideas which had a certain impact on politics and society in recent years. As put by Harvey, neo-liberalism proposes that “human well-being can best be advanced by liberating individual entrepreneurial freedoms and skills within an institutional framework characterized by strong private property rights, free markets and free trade” (2005, p. 2). Free markets and free trade were believed to set free the creative potential and the entrepreneurial spirit. Therefore, these conditions lead to more individual liberties and improved well-being, along with a more efficient resources allocation (Thorsen and Lie, 2007). Neo-liberalism also stresses the idea of a “good and virtuous person” as the one who is able to access to relevant markets, function as a competent actor willing to take risks, and adapt to rapid changes (Thorsen and Lie, 2007, p. 15). Through the neo-liberal lens, individuals are also seen as being solely responsible for their choices and decisions. The practical implementation of neoliberal ideology will lead to a shift of power from political to economic processes, from the state to markets and individuals (Thorsen and Lie, 2007, p. 15).

In line with Dey (2013), Mair (2011) also suggested that social entrepreneurship is more likely to appear in liberal economies. Grant (2008) pointed out that, in New Zealand, the scope of contemporary social enterprises in the country was influenced by neoliberal reforms dating back to the 1980s. Furthermore, social

entrepreneurship is perceived as the means which “Third Way writers propose to reconstruct welfare and [which] involves building social partnerships between the public, social and business sectors” (Cook, Dodds and Mitchell, 2003, p. 57) while stimulating market behavior in the interest of public goals. The figure of social entrepreneur is associated with the idea to “restructure social services with a ‘neo-liberal’ twist” (Ziegler, 2009, p. 14).

On the other hand, some authors argued that social entrepreneurship is not a pragmatic solution to resolve social problems; rather, it has been criticized for “being a neoliberal strategy for social service provision” (Dey and Steyaert, 2012, p. 4). Not surprisingly, Dey further added that social entrepreneurship creates an ideal vision which “conceals the real conditions of the social sector” (2013, p. 4). In this sense, the state and other relevant actors embraced social entrepreneurship in an effort to cover up the government’s failures in addressing socioeconomic issues, and the government’s share of responsibility toward society’s problems. Therefore, Wacquant (2010) pointed out that social entrepreneurship serves as an instrument of state power to make sure that the civil society will self-function and be able to take care of itself. Dey (2013) saw this as an endeavor aimed at regulating society in particular ways, where social entrepreneurship is seen as a way of governing the population in the state interest.

### **Neo-liberalism and social work**

Neo-liberal discourse also has great influence on the decentralization developments in social work that accelerated in the 1980s and onward (Sievers, 2016; Neal, 2015). In the context of social work goals, neo-liberalism stresses the idea of independent, responsible, and active clients. The state has shifted to the position of a partner in the provision of social services, rather than a primary services provider. A lot of criticism targets the “one-size-fits-all” model of the state; consequently, a new positive narrative of civil society and third sector began to take shape (Sievers, 2016). The re-positioning of the state led to a responsibility shift in voluntary sector which was remarked by the integration of NGOs in this field (Gray et al., 2003). In many countries, the roles of the third sector are noticed and appear to satisfy the needs which could not be met by the state and/or the market.

The decentralization in social and community work also meant that the relationship in the funding basis between state and voluntary sector was changed (Davies, 2011; Henriksen, Smith and Zimmer, 2012). There was a shift from the grant giver–grant receiver relation to a more market-based relationship, in which voluntary organizations offer a service and the local authority pays for it. In other words, there has been a great change from grants to contracts and, at the same time, a market-based logic was introduced in the relation between state and voluntary sector (Eikenberry and Kluver 2004; Davies 2011).

There has also been a global trend of an economic replacement of political power in manipulating the social system. Due to the economic crisis in the 1970s that affected many Western countries, state funding allocated to social welfare agencies was significantly limited. The non-profit sector has been growing because of the outsourcing social service provision to NGOs, and a consequent increase of competition for limited funds (Hasenfeld and Garrow, 2012). Social work professionals who work in human services have to cope with the uncertain future of their programs and their dependence on time-limited grants, which leads to disruption and gaps in the provision of services (Neal, 2015). In case of donations, organizations might have money for programs, but at the same time they may not be able to stimulate any development or pay their staff. Social workers are therefore confronted with the impossible challenge of balancing the lacking resources with the unrelenting pressure to produce measurable outcomes (Neal, 2015).

The primary goal of social work has undergone a transformation, too, from being concerned with caring and providing welfare, to being increasingly concerned with work integration (Aiken and Bode, 2009; Alexander, 2010). Work integration is often understood as programs of creating job training opportunities, activating unemployed people, providing up skilling courses, establishing new enterprises with potential new job openings for marginalized people, and so on. The tasks that professional social work, voluntary social work and community development should perform were perceived differently. There is a general expectation of social work to protect clients from social exclusion, or to support them in their reintegration into society. In the situation when employment is considered to be a keystone of integration, social work seems to be getting into trouble, as it is not able to create any job opportunities itself (Castel, 1995).

The demand towards social service providers to have the ability of demonstrating measurable outcomes has also affected the social work field. In many cases, social workers are asked “to do more with less” (Gray et al., 2003, p. 144). Many social workers are coping with the limitations of individual welfare provision to empower clients and enable sustainable social and economic development (Midgley 1996; Mawson, 2001; Gray et al., 2003). The low extent of clients’ participation in social work practice has also been criticized. According to some authors, it is not easy for social workers to claim the results of empowerment, which is one of the significant factors that characterize the social work profession. Social work has always struggled with the question of how to empower clients so that they can develop their skills and knowledge, and improve their participation (Gray et al., 2003). Another question that has been raised is that of the sustainability of supporting services, which are not only constrained by the limited funding, but also by their limited applicability. The inappropriate usage of aid or funding in social work can create a group of passive people in society while also heightening their demands with respect to government support (Pankiv and Duranowski, 2014).

## The global emergence of social entrepreneurship

According to Sievers (2016), the decentralization developments in social work increased the interest in social entrepreneurship in many countries. The 20<sup>th</sup> century saw a great emergence of social enterprises around the world. In Western Europe, due to the economic downturn of the 1970s, economic growth decreased and unemployment rate escalated, which placed a big pressure on the welfare state system. In order to cope with many social problems that occurred in this situation, civil societies developed various programs and initiatives, particularly in work integration. Social enterprises emerged throughout Western Europe with the focus on employment-creation for those who were poorly qualified and/or unemployed in society (Poon, 2011). Governments perceived social enterprises as partners through whom they could resolve the socio-economic problems, which the welfare states were unable to effectively address. Social enterprise in the West European context was often viewed as equivalent to social cooperative (Ucieklak-Jez and Kulesza, 2014). For example, Portugal created 'social solidarity cooperatives' in 1998; Italy created 'social cooperatives' in 1991; Greece created 'social cooperatives with limited liability' in 1990; Spain created 'social initiative cooperatives in 1999,' and the UK created 'community interest companies' in 2004. These models were seen as the results of the Digestus Project implemented by the European Commission which promote social enterprise based on the Italian model of cooperative enterprises (Lindsay et al., 2003).

The social enterprise sector in Eastern Europe emerged from the withdrawal of the state's roles due to the fall of communism. The fall of communism in the late 1980s, along with the economic recessions of the 1970s and the transition to a market economy, caused massive dislocations in the economy and high levels of unemployment (Ucieklak-Jez and Kulesza, 2014). Meanwhile, these changes also simultaneously reduced the state's role in addressing various socio-economic issues. In that situation, foreign actors played an important role in catalyzing the development of the social enterprise sector, drawing on the West European experience of social enterprise. As a result, technical expertise and financial aid provided from such foreign actors led to the growth of the local social enterprise sector. Further, to prepare the countries for joining the European Union, many East European countries strove to meet an important condition, which was to address the various socioeconomic issues such as unemployment. This further reinforced the growth of social enterprise sector in addressing these problems (Borzaga et al., 2008). For example, in Poland, due to the shift from the centrally planned economy to the market economy in 1989, the role of the state as an employer was minimized, and the access to social benefits and services was limited (Kusa, 2012). This situation led to the increased rate of unemployment and poverty, and widened the gap in

social benefits and services system (Ucieklak-Jez and Kulesza, 2014). The systemic and economic transformations in Poland have also led to other trends, such as the transfer of social objectives to the non-governmental sector and the focus on the provision of independent financial sources. These trends expanded the prospects for social entrepreneurship (Kusa, 2012; Praszkiel, 2014; Pankiv and Duranowski, 2014). The social economic operators in Poland display the characteristic features of social entrepreneurship, such as the fact that the income generated from economic activity must remain within the capital of those organizations and be re-invested for the benefit of the members (Ucieklak-Jez and Kulesza, 2014). Over ten thousand of social entrepreneurship entities in Poland conduct activities focusing on work mobilization, especially of the long-term unemployed or the disabled persons support (Kusa, 2012; Ucieklak-Jez and Kulesza, 2014).

In the United States, the emergence of the social enterprise sector was driven by the political withdrawal of the state due to economic conditions, the prominence of business approaches, and the support from private foundations and academic institutions (Poon, 2011). The high oil prices of 1973 led to a prolonged economic downturn in the US. Consequently, government funding for non-profit organizations was cut by the Reagan administration. Meanwhile, there funding competition increased because of the growing number of non-profit organizations and the rising social needs. Therefore, a shift toward commercial revenue generation was prompted. According to various scholars such as Crimmins and Keil (1983) and Eikenberry and Kløver (2004), commercial revenue in non-profits was seen as a means of replacing government funding. This paved the way for the social enterprise sector to emerge as a widely accepted instrument toward addressing social problems due to the withdrawn role of the state.

In the meantime, business and management appeared as an attractive alternative means for generating income, instead of depending on the Government funding. In addition, this shift toward social entrepreneurship was strongly supported and reinforced by private foundations and academic institutions. As Poon (2011) explained, private foundations provided a range of operational support whereas academic institutions established a broad range of courses and programs to develop the necessary talent for the sector.

The social enterprise sector in Latin America emerged with a strong focus on cooperative-type organizations because of the influence of European traditions and practices brought by Western European immigrants. As Defourny (1992) proposed, the failure of the welfare state system, the fall of centrally-planned communism, and the subsequent economic crises increased the growth of socio-economic problems in these countries. Against these conditions, social enterprises—in the form of cooperative-type organizations—appeared as an effective solution. For example, Roitter and Vivas (2009) pointed out that in Argentina, social enterprises appeared and grew as an alternative to unemployment and social exclusion which were no



longer being addressed by the economic sphere and the public sector. This reality is similar to what has happened in the other regions worldwide.

The emergence of the social enterprise sector in Africa was mainly caused by the cuts in state funding and the influence of foreign actors related to the conditions of foreign aid (Poon, 2011). Decreased state funding and the escalation of socio-economic problems led many NGOs to adopt social enterprise models in order to enable sustainability in delivering services (Sesan, 2006). At the same time, deregulation and privatization created a pluralistic environment in which the role of the state as the sole party in socioeconomic development was diminished. Together these conditions led to the rapid expansion of the non-state sector. The inability of states to address socio-economic problems also attracted foreign aid to this sector in African countries. Much of this aid came from the US, and thus it brought along American concepts and models of social enterprises. This constituted a crucial factor in the growth of social enterprises in Africa (Chabal and Daloz, 1999).

The emergence of social enterprise in Asia differed from country to country. For example, in India the socio-economic problems were exacerbated due to the influence of global economic development. The country has seen a trend toward smaller government roles and greater deregulation, which have often been imposed externally through foreign aid agencies (Swissnex India, 2015). Furthermore, India has a strong NGO culture and an associated emphasis on rural development amongst citizens. These social and cultural characteristics therefore provided a fertile ground for development to large numbers of social enterprises. Indian social entrepreneurs were influenced by the natural links with the US and Western Europe through the English language and a strong network of institutional support organizations. These entrepreneurs would then apply their expertise, knowledge, and resources to addressing massive socio-economic issues (Swissnex India, 2015).

In Vietnam, the 1986 renovation and the subsequent open-door policy have created favorable conditions for non-state economic and social organizations to flourish. This sector has made significant contributions to Vietnam's economic growth, and to the achievement of many important social objectives, such as poverty reduction, environmental protection, and social justice. In 2010, Vietnam was re-categorized as a lower middle-income country; since then, the international aid has been gradually reduced. Furthermore, due to the economic crisis in the country, the Government began to restructure and tighten fiscal provisions, and reduce government debt. Meanwhile, increasingly complex social and environmental issues still exist. In this context, many social initiatives have been implemented using business activities as tools to produce social solutions for the community under the social enterprise model (Nguyen et al., 2012). From then on, a number of NGOs have also transformed themselves into social enterprises to pursue new directions of development in service delivery.

## Social entrepreneurship as a way out of social problems

As explained above, the global tendencies of decentralization and marketization, along with the focus on work integration, have contributed to the development of social entrepreneurship which has become the obvious solution to social problems internationally (Sievers, 2016; Gray et al., 2003). Linton (2013) contends that the current challenges faced by social workers globally create a higher demand for social workers to be knowledgeable on the development of enterprises and non-profit organizations. The global financial crisis requires social workers to become educated on the potential benefits of social enterprises, prepare to take risks and embrace this approach (Germak and Singh, 2010). The increasing needs of service delivery and the contextual shifts in social services provision create a need for establishing the linkages between social work and social enterprise practices in order to effectively address contemporary social problems (Neal, 2015).

Germak and Singh (2009) continued to raise concerns about the difference between the needs versus the demands of clients in social services. For example, do social workers know what clients truly want? Does what they want really overlap with what social workers determine to be their needs? Germak and Singh (2009) further stressed that the client's right to self-determination is terminated by programs that prescribe what the client needs. Such concerns can be more easily resolved in a social entrepreneurship paradigm, since social entrepreneurship is an approach to understanding social needs (Townsend and Hart, 2008). When an organization no longer depends on donations and government contracts, it can respond to market demands and develop services in response to what clients need. The understanding of market demands is fundamental to the success of a for-profit business; however, it can also be explored in the context of social services (Stevens et al., 2015).

Indeed, social entrepreneurship is not a new idea; rather, it has always been part of social work practice (Gray et al., 2003). Recent studies on social entrepreneurship and community development suggested that social entrepreneurship is a way to grow local communities. (Jain, 2012; Eversole, 2013; Lan et al., 2014). It "enhanced food security, employment generation, community strengthening and local economic stimulus" (Eversole, Barraket, and Luke, 2013., p. 259). Social entrepreneurship "generated economic viability for services delivery to a vulnerable population as well as raising awareness of stigmatization of people with intellectual disabilities" (Ersing et al., 2007, p. 212). Further, the links between social entrepreneurship and community development have shown the ways through which social enterprises simultaneously utilize, create and generate social capital in the community they operate in (Kay, 2006).

Social entrepreneurship appeared as a natural response to the gradual withdrawal of the state from providing social welfare services (Pankiv and Duranowski, 2014; Neal, 2015). Social enterprises help to extend the options of social and

economic participation for clients (Gray et al., 2003). They help to develop clients' skills, knowledge and attitude. Santos (2012) affirmed that it is an approach that seems suitable to address some of the most pressing problems in modern society. For example, Praszquier and his colleagues (2014) discussed one of the problems that social entrepreneurship attempts to address: the employment of those who do not have jobs and are socially excluded. Social enterprises act as facilitators of integration and reintegration, which are crucial in building social bonds. Moreover, social entrepreneurship is likely to provoke significant changes in individuals involved in this activity. Besides, social entrepreneurship plays an important role in changing negative stereotypes about excluded groups (Ersing et al., 2007), such as people with disabilities, addicts, or homeless people. The aim of social entrepreneurship is to facilitate certain social situations such as increased mobilization, full integration, sustainable employment, and reduced marginalization. These situations are essential and contribute to the well-being of clients (Pankiv and Duranowski, 2014).

### **The connections between social entrepreneurship and social work**

Many discussions have been recently launched on the relationship between social entrepreneurship and social work since some components of social work fit within the definitions of social entrepreneurship (Berzin, 2012). The vision of social entrepreneurship entails social wealth for disadvantaged groups and individuals (Gray and Crofts, 2002). Social work also pursues an approximate ultimate goal of the profession that is defined as the one that strives to "address life challenges and enhance wellbeing" (IFSW, 2014). Both social work and social entrepreneurship embrace the empowerment of people and their liberation by transferring economic power (in social entrepreneurship) and by professional intervention (in social work).

The core purposes of social work show a clear commitment and mission to address social problems, since social work challenges barriers, inequalities, and injustices that exist in society (IFSW, 2012), with the aim of promoting social change and development. Quite similarly, the aim of social entrepreneurship is to tackle social problems, for example social entrepreneurship is considered as one of the effective instruments to achieve the Millennium Development Goals (MDGs). The MDGs noticeably alleviated poverty, unemployment, and female powerlessness; and social entrepreneurship has become an alternative to these issues (Tunde, 2015). Social entrepreneurship stimulates social change and meets social needs, which is also the mission of social work profession toward its clients. Although it is important to consider the mechanisms by which social change is accomplished, these matters, according to Berzin (2012), suggested potential links in the mission and value of social work and social entrepreneurship.

One such potential link may be found in professional working competence of both social workers and social entrepreneurs. London and Morfopoulos (2010) and

Ashoka (2013) identified many competencies that make successful social entrepreneurs. Besides the typical financial and managerial skills, social entrepreneurs must be able to build coalitions, conduct policy analysis, encourage citizen participation, advocate for issues, and lobby decision makers. Their crucial skills include conflict management, collaboration, cultural competency, self-awareness, emotional intelligence, empathy, and active listening. These listed competencies are relevant to social work's areas of expertise, such as community development, policy analysis, cultural competency, discrimination and oppression, and communication/interpersonal skills. Social work is built on the principles of social justice, human rights, collective responsibility, humanities and indigenous knowledge (IFSW, 2012). Therefore, many authors suggested that it would make social work become an ideal partner of social entrepreneurship (Nandan and Scott, 2013; Berzin, 2012; Tunde, 2015). Both Wuenschel (2006) and Hoefer (2003) affirmed that a master's degree in social work is the most appropriate qualification for leaders of human service organizations. In short, social entrepreneurship is a field in which the expertise of social workers is undoubtedly useful and appropriate (Germak and Sign, 2009). Knowledge in social work and business is necessary to successfully develop a social enterprise (Linton, 2013).

Social work and social entrepreneurship also share the same concern of sustainability. Social work emphasizes addressing contextual barriers and formulating visions of sustainable change. The call for sustainable development is also responded by social entrepreneurship in terms of alternatives and innovation. These alternatives serve as products of continuous changes in the implementation of sustainable development (Tunde, 2015). Social entrepreneurship usually starts with small local efforts, and targets social problems expressed locally. Yet it also has to be acknowledged globally (Mair et al., 2006). Therefore, social entrepreneurship is argued to be one of the instruments needed to accomplish global equality (which is also the aim of international social work). In fact, given that social entrepreneurship has the potential to provide alternative source of funding, empower clients, it actually supports the values of social work, such as human service, integrity, competence, and social justice (Neal, 2015).

### **Calls for research on social entrepreneurship, with a focus on social work**

Discussions in the literature show the alignment between social work and social entrepreneurship, and therefore demonstrate that social work is capable of engaging in social entrepreneurship. The social entrepreneurship movement is increasingly relevant to social work, particularly in the context of tight funding and increased accountability requirements. Social enterprise and social work "are compatible and even complementary" (Neal, 2015, p. 8). However, Berzin (2012) stressed that social work seems to continue to be notably absent from the discussion on, and

definition of, social entrepreneurship movement. By not engaging in the public dialogue on social entrepreneurship, social work misses an opportunity to benefit from the effectiveness of social enterprise, especially in terms of funding, attention and social entrepreneurs' talent (Neal, 2015; Gray et al., 2003). Moreover, it seems that thus far, relatively little interest from social workers have been given to social entrepreneurship research, education, or practice (Nandan and Scott, 2013). Despite the congruence between social entrepreneurship and social work, little attention has been paid to the role of social work in promoting and developing social entrepreneurship. In the same line of thinking, Gray, Healy and Crofts (2003) stated that, "Social workers involved in community development initiatives with impoverished communities have been strong advocates of social enterprise... though, on the whole, it has been a marginal theme in professional social work" (p. 141-142).

Wuenschel (2006) emphasized that it is a must for social work to be present in public discourse on how to approach and resolve complex social problems. In 2002, Healy made the argument that "if social workers are to achieve service outcomes consistent with their values, they must be conversant with the new public management discourses now shaping the field" (Healy, 2002, p. 529). Social enterprise discourse shapes the ways countries address social problems (Neal, 2015). As such, the social work field has an ethical responsibility to pursue the best solutions and should therefore engage in social entrepreneurship to stop the disruptions and fill the gaps in services. Furthermore, Germak and Singh (2009) cautioned that if social workers do not engage in the discourse shaping society's approach to social problems, then "other professionals may lead social work agencies in greater proportions, and the impact on the clients served would be a result of the values and ethics of professions other than social work" (Germak and Singh, 2009, p. 91). In a word, social workers have a duty to bring the realities related to social entrepreneurship to the attention of stakeholders, and to contribute to the global debate about new solutions. Also, in its ambition of creating solutions, social work is "committed to work in collaboration with other professions which aim to promote human rights and the social and environmental well-being of individuals and communities" (IFSW, 2012).

Germak and Singh (2009) proposed that social entrepreneurship is a potential good match for social work; thus, it can be "worth the effort." Dart (2004) further explained that adopting the business approach in the human services can offer new service delivery models that are more independent than the traditional ones. It is the responsibility of ethical and professional social workers to experiment and then determine whether to adopt such models, or go back to traditional ones. Social workers should involve and play a role in social enterprise initiatives to evaluate whether measurable social impact outcomes are actually achieved, rather than just avoid a movement which has called much attention, resource, human talent, and funding to solving social problems (Neal, 2015). In summary, social workers not only

have the knowledge, skills, and competences applicable to social enterprise but also the ethical responsibility to explore the best possible solutions to social problems.

These statements suggest a need to revisit the social work field in the context of social entrepreneurship (Berzin, 2012). In essence, much more relevant research must be conducted, including, for example, comparisons between the effectiveness of social entrepreneurship and traditional social service interventions (Stevens et al., 2015; Germak and Singh, 2009; Neal, 2015; Berzin, 2012). However, it is recommended that social workers and business professionals conduct research jointly in order to avoid the biases that could unfairly depict the conclusions. According to Stevens et al. (2015), relevant research to-date has specifically focused on the importance of the dominant social mission from a theoretical perspective. As such, the “social” is largely taken for granted, and the “economic” is considered as a crucial framework condition. Therefore, further research is necessary to look beyond the “meta-rhetoric of social entrepreneurship” and get into the concrete enactment of social entrepreneurship in a specific setting (Sievers, 2016, p. 80). It needs to focus on what has been identified as neglected topics, such as the experience of the people working and participating in the social entrepreneurship movement (Amin, 2009; Sievers, 2016), including social workers.

### **Methodology and research description**

This research can be described as a cross-national study based on data from two countries that represent two different regions of the globe (Europe and Asia).

The main research question is: “How is Social Work practice in Social Entrepreneurship?” The overall aim of the project is to answer this question by investigating the “how” of the social work practices in social entrepreneurship; and to see how these play a part in developing and promoting this field. Based on this goal, some sub-questions are developed as follow:

Sub-question 1: Where do social work practices takes place in the work of a social enterprise?

Sub-question 2: How do social workers and/ or staffs apply their knowledge and skills – which related to social work – into their working activities?

Sub-question 3: What are the issues, dilemmas, or tensions exist between the two working aspects (social versus entrepreneurial)? How can these be addressed?

This research followed a qualitative approach which aims at a complete, detailed description that accounts for the context of events and circumstances (Cooper and Burnett, 2006). Semi-structured interviews were conducted to gain the rich data in the language used by the interviewees, and contextual and relational aspects were considered as crucial to the understanding of their perceptions (Newton, 2010). Moreover, such interviews created more freedom for the interviewees to provide

richer information; as pointed out by Newton (2010), the semi-structured interview method is in line with the participatory and emancipatory models.

The research applied Guba and Lincoln's (1985) criteria for evaluating qualitative enquiry. Guba and Lincoln established techniques which can support the researcher in achieving the trustworthiness of the study, including credibility, transferability, dependability, and confirm-ability. The process of triangulation was applied, using semi-structured interviews, the analysis of the online material through a website and a blog; and the documentation received from the interviewees (Shenton, 2004).

The interviews were conducted with five informants, four women and one man. Three informants came from Poland (Poznań, Wrocław and Warsaw), and two from Vietnam (Hanoi). Among them, three informants held qualifications and had a background in social work. Their working positions ranged from the founder to manager, director, and social worker at different organizations, which would be classified as 'social enterprises' in Vietnamese context and 'social cooperatives' in Poland. The study focused on various social enterprises working in different fields in order to draw a wider picture of the social aims of social entrepreneurship.

One limitation of this research is its small scale, so it can be treated only as an initial sample. In addition, the language barrier of the researcher collecting data in Poland affected the richness of the data collected in the course of the study. However, the strength of this research was gaining insights of social work practice in some specific social enterprise settings. It explored the perspectives of different actors (founder, manager, staff member) working in the social entrepreneurship movement.

Informants characterized their organizations as "a social cooperative for juveniles" [Informant 1], "a start-up social cooperative run by creative people" [Informant 3], or a social cooperative in the form of "an eco- friendly, vegan-friendly hostel;" to "a social enterprise - a social café, serving "not only the food and drink services but also the 'spiritual/ mental' service" [Informant 2 and 4].

These social enterprises' target groups were varying, from youth, juvenile, people with disabilities, to those who are long-term unemployed or homeless or living on the street. Besides, community and natural environment were also considered as important targets, since many social enterprises offer the programs on community development, and environment protection.

## Research results

There are clear connections between social entrepreneurship and social work.

Firstly, it is important to note that these studied social enterprises have similar target groups within the social work profession. The research results showed that juveniles, youth with mental health issues, people with disabilities, long-term unemployed or homeless people/people living on the street, are the target of social

enterprises. Interestingly, as in the statement of the International Federation of Social Workers (IFSW) regarding human development in globalized reality, social work concerns the well-being of humans, especially those who are “marginalized, socially excluded, dispossessed, vulnerable and at-risk” (IFSW, 2012a). The conducted research has also indicated communities and environment as the targets of these social entrepreneurship activities. This is also in line with one of the biggest concerns of social work related to human rights. Upholding and defending human rights also including working toward the social as well as the natural environment.

Secondly, though economic value creation (i.e. money generated from business activities) is important for sustainability and financial self-sufficiency, the main focus of these social enterprises was to improve the quality of human lives by offering support and providing the required services, selling responsible and better business products, or providing employment opportunities for people in difficulties. These social enterprises are clearly striving to create positive changes and more social values. When referring to social work’s vision, we definitely see a similar goal. The international definition refers to social work as the profession working toward “social change, problem solving in human relationships and the empowerment and liberation of people to enhance well-being” (IFSW, 2014).

Thirdly, research results showed an adoption of social work’s empowerment approach in social enterprise’s activities. Empowerment in social work means to liberate people from social and psychological barriers so that their natural goodness can flow through (Thompson, 2007). Cowger and Snively (2002) regarded empowerment as central to social work practice and perceiving clients’ strengths as providing the energy for that empowerment. These perspectives of empowerment can be seen in the way social entrepreneurs analyze their clients’ strengths and, at the same time, create favorable conditions for their clients by transferring economic power (mostly under the form of employment as in studied organizations). That approach of empowerment through employment is widely viewed as the effective instrument to tackle social exclusion and promote integration.

Neoliberal ideology shapes the reasons behind the adoption of social entrepreneurship and the challenges facing social work.

The economic downturn in many European countries during the 1970s increased the unemployment rate and expanded the influence of neo-liberalism. Under the great influence of neo-liberal discourse, social work has been facing tough challenges. These are not limited to the withdrawal of the state as the main service provider followed by the shift from grants to contracts; the limited funding with the demand of doing more with less; the pressure of undergoing a transformation, from being primarily concerned with caring and providing welfare to being increasingly concerned with work integration. In this context, social work seems to get into trouble, as the profession is not able to create any job opportunities itself (Castel, 1995). Also, work integration stresses the idea of independent, responsible,



and active client. According to Pankiv and Duranowski (2014), this process also aims to shape the positive attitude and behaviours of individuals and communities. Meanwhile, the research findings showed that the main reasons for adopting social entrepreneurship approach among the informants lay in their realistic irritations, namely the difficulties facing people, mostly those who are marginalized and suffered from inequality; the inadequacy and unresponsiveness of contemporary services; and the gaps and limitations in social welfare policies and the supporting models that are no longer suitable. As a response, these social enterprises and cooperatives emerged to provide social services that are not satisfied by the government and/ or the market. Employment was seen as a crucial tool in empowering clients, and a mechanism by which individual and social changes are accomplished. These social enterprises emphasized the idea of helping their clients be responsible, independent, and competent as a desired state to be achieved.

Social work expertise appears to be applicable and important to social entrepreneurship

In this study, social enterprises/cooperatives which have social workers as founders and/or staff showed more attempts to adapt the organizational working conditions and approaches to the needs of their target groups. Their vision was achieved through a long-term process of empowerment. The evaluation of social impact focused on the changes in human in terms of ability, confidence, resilience, and so forth. This study also found that organizations without social workers seemed to have attempted to provide target groups with immediate support and services more often. Their evaluation of social impact was mostly quantitative (it relied on number of people, workshop and similar). Given the small scale of this research, to confirm that having social workers is actually an impactful factor requires further exploration; however, it is fair enough to say that the presence of social workers seemed to direct the social enterprise better towards its social goal.

When studying these enterprises, the researcher found their activities similar to social work practices, which ranged from direct intervention (working, coaching, consulting, counseling) to project planning, management and implementation, supervision, and working with groups and communities. It is also worth noticing that there were more interactions with the community and group than with individuals among these social enterprises. Meanwhile, community development has already been considered as one important element of social work practice. This actual match between the two fields supports the suggestion found in the literature review, namely that social entrepreneurship has always been a business of social work (Gray et al., 2003). In fact, “social workers involved in community development initiatives with impoverished communities have been strong advocates of social enterprise” (Gray, Healy and Crofts, 2003, p. 141).

Moreover, social entrepreneurs with a social work background actually find their social work knowledge, skills, and approach relevant and helpful in their work in

social enterprises. Even though business knowledge would be an essential element, those informants who do not have any background in social work recognized the demand for recruiting social workers and/or having such expertise that is relevant to social work knowledge, skills and competencies, such as community development, policy analysis, cultural competency, discrimination and oppression, and communication/interpersonal skills. Besides, social work is built on the principles of social justice, human rights, collective responsibility, humanities and indigenous knowledge (IFSW, 2012). Social work is both interdisciplinary and trans-disciplinary (IFSW, 2014); therefore, it is promising to address the challenge of working in inter-disciplinary social enterprises.

Social entrepreneurship's innovation and leadership are considered as meaningful to social workers in tackling social issues.

Freedom, responsibility, and leadership are inter-related characteristics that define social entrepreneurship. Leadership was performed in a decision-making process as an ability to take initiative and actively react to the challenges and changes. Innovation is one of the crucial elements that can be seen through the working approach of these organizations. As such, they have adopted creative and different approaches to those traditional social support models. For example, rather than seeking for financial aid from outsiders, they use the adopted business model to generate income, reinvest, and implement social activities at the same time. With regard to the social goal, they developed services that are suitable to the needs of clients, proactive, and creative.

These innovations even challenge the 'traditional' understanding of giving help, such as the common myth that mental health issues should be seriously concerned as psychiatric problems; that counseling services should only be offered by psychiatrists in designated settings such as hospitals or clinics; or that those associated with potential problems (e.g. criminals, the long-term unemployed, the disabled) are unable to work and should just rely on charity.

All of these features appeared to be meaningful to social workers, especially in the context of social work's ethical responsibility to challenge unjust policies and practices—where resources are inadequate or where the distribution of resources, policies and practices is oppressive, unfair or harmful—in order to stimulate effective solutions in addressing social problems.

### **Discussion and recommendations**

#### **New territory for social workers (social work expansion)**

Data analysis shows the congruencies between social entrepreneurship and social work in terms of the commonalities in vision, target groups and beneficiaries, and the purpose toward social wealth creation, inclusion and integration. More importantly, both social work and social entrepreneurship embrace the idea of empowerment

of people and their liberation. Empowerment is considered as a desired state to be achieved, and an important mechanism to tackle social exclusion and promote integration, by which individual and social changes are accomplished. Social work basis, understanding, knowledge, and skills were acknowledged by the informants as helpful for their works. The challenges facing social enterprises actually belong to the expertise of social work. Social workers are employed in social enterprises, and are considered as recruitable, mostly to work with the target groups or deal with communication issues. Various forms of social work practice can be found in the daily activities of these organizations, mostly with respect to community works. Therefore, the connection between the two fields is further reaffirmed, as community development has been considered as a fundamental element of social work practice.

These matters of fact showed the *potential for social workers to be engaged in social entrepreneurship development more deeply*, given that social work knowledge and skills appear to be appropriate and helpful in this field. Therefore, social entrepreneurship could be considered as an exciting new field of employment market for social workers, especially in the countries where social work institutions are not fully developed.

However, it is necessary and crucial for social workers to be aware of the challenges they might have to cope with when attempting to engage in the field of social entrepreneurship. Social workers may find themselves caught in the midst of ethical dilemmas between the social and entrepreneurial missions. Social workers need to be attentive and undertake significant efforts in order to balance their commitment to clients and that to external stakeholders. Besides, it is a tough mission to stay simultaneously focused on both of the social goal and the business purpose (Germak and Singh, 2009). If too much attention was paid to social activities, perhaps clients could be well served in the short term. However, this would lead to the loss of business focus and diminish the generated income, which would consequently threaten clients' well-being.

In addition, social workers should also be aware that their education and training might not fully prepare them to participate in market driven activities (Linton, 2013); therefore, they must work in collaboration with an interdisciplinary team in social entrepreneurship. Such teams, formed by people who have knowledge and expertise in social services, business, and finance, are indispensable to creating a social enterprise.

### **Filling the gaps in the current social work practices and methods/ interventions (social work improvement)**

The reasons for adopting the social entrepreneurship approach with the informants stemmed from their irritation with reality, namely the difficulties facing people, the inadequate and unresponsive contemporary services, and the gaps and

limitations in social welfare policy and outdated supporting models. As a response to these shortcomings, social enterprise and cooperatives emerged to provide social services, which are not met by the government and/or the market. The approaches of these organizations appear to be proactive, innovative, and suitable to their target groups.

The above suggests that social entrepreneurship should be considered as an experimental solution to social workers, especially when the social work profession has been faced with decentralization and transformation under the great sway of neo-liberal discourse. At the time when economies struggle to overcome increasingly serious problems, people focus on new, alternative forms of entrepreneurship that could reduce unemployment, if only on a small scale. Moreover, traditional social work practices are not for everyone, and social entrepreneurship helps to fill the gaps and meet the needs of those who are on the outside looking in at the existing systems of support.

In fact, many commentators argue that social workers not only have a skill set applicable to social enterprise but also an ethical responsibility to explore and pursue the best possible solutions to social problems, in order to offer insulation from disruptions and gaps in services (Neal, 2015; Germak and Singh, 2009; Healy, 2002). As social entrepreneurship is viewed as a relatively new field in many countries, it is also the responsibility of professional social workers not to avoid but rather experimentally test the effectiveness of this model and be present in social entrepreneurship initiatives to evaluate whether the measurable social impact outcomes are attained (Neal, 2015).

In terms of their identity, the informants did not see themselves as social entrepreneurs, but rather social workers. This could be explained by the construct of the mind based on individual experience, including working experience as social workers in the past and present. This finding suggests that social entrepreneurship is not necessarily a replacement of social work practice; rather, it is a complement to social work profession, a new method that is internationally tested.

In the process of adopting the social entrepreneurship model, social workers should be cautious of the contested concepts and definitions of this field, as well as the dependable legal identifications of social entrepreneurship which could be locally different. Furthermore, while some of the most pressing social issues such as unemployment and poverty have proven to be effectively addressed by social entrepreneurship, social workers must understand that this approach may not be fully successful in resolving other problems. Again, further studies and experiments are required so as to explore to which arenas of social work social entrepreneurship should be applied.

### **Approach to professionalization, innovation and creativity (social work leadership)**

Innovation is one of the crucial elements that can be seen through the working approach of these organizations. As such, they have adopted a new and different approach to traditional social support models. For example, they adopted the social entrepreneurship approach, which means using a business model to generate income and implement social activities at the same time. With respect to the social goal, they have developed their services in line with the needs of clients, proactively and creatively. Thus, social entrepreneurship can make social work practice more creative by contributing its innovative style to this field.

This could be seen as an opportunity for ethical and professional social workers to be critical and reflective of their works. Reflection seems to be an activity that has been taken for granted, especially by those social workers who have been working in the system for years. Being proactive, creative, and innovative is therefore crucial to social workers in order to develop and pursue new ideas in their pursuit of professional goals and bring about more positive social impacts.

These social entrepreneurship innovations challenge the traditional understanding of providing help. They also challenge the discrimination and prejudice against vulnerable groups in society. These understandings are misleading, unjust, and strongly affect community awareness and social justice. Social workers should challenge unjust policies and practices, wherever resources are inadequate, or the distribution of resources, policies and practices is oppressive, unfair or harmful. Therefore, it is the obligation of social workers to challenge the social conditions that contribute to social exclusion, stigmatization or subjugation, and to work towards an inclusive society. This also refers to the social work activities and working approaches that are no longer appropriate.

Nonetheless, social workers must not perceive innovation and leadership as the only factors leading to success. Being a leader of social enterprise requires in-depth understanding and competence. Also, the literature brims with accounts of failures of many innovations in the field of social entrepreneurship. Rykaszewski et al. (2013) discovered that the success of a social enterprise is also associated with proper legal support, external funding (especially in the early stage), appropriate personnel, a strategic business plan and comprehensive social impact evaluation. Thus, social workers must consider the features of innovative and leadership as crucial; at the same time, they do not need to conceal the importance of other elements.

Also, social workers running social enterprises may have to cope with the critique of social entrepreneurship characteristics as contradictory to the values and culture of social work (Fargion et al., 2011). Accordingly, the ability of being innovative, proactive, and willing to take risks is often associated with the actions of social entrepreneurs as individuals and presumed to collide with the idea of social work understood as a partnership.

### **Enhancing the competences of social workers (social work education)**

Besides the above, the conducted analysis shows that social workers engaged in social entrepreneurship were required to have business-related knowledge and skills. This is seen as a basis to establish and drive a social enterprise to success. Thus, it is necessary and important for social work education to establish social entrepreneurship as one of the core subjects in the curriculum. As the concept of social entrepreneurship is still relatively new, practical models and concrete definitions would be very helpful. The curriculum could focus more strongly on social-entrepreneurial skills, including project planning, implementation, and management; project evaluation; budget management, human resources, and so on.

However, given the fact that social work curricula have been developed and “carefully selected to balance the need[s] of students, the profession, clients, and society” (Bent-Goodley, 2002, p. 292), it is essential for social workers (as educators and learners) to be aware that the limited time offered by curricula restricts their respective inputs. Therefore, social entrepreneurship may not actually be established as a core area of knowledge and skills; nevertheless, it could complement curricula in the form of a specialization or an important topic in social work education.

This study also suggests *the need to build a bridge and facilitate a working collaboration between social work and the entrepreneurial sector*. This might be seen as a challenge for many social workers; however, it seems helpful and necessary for them to be able to learn and receive support driven by entrepreneurial expertise.

### **Practical consideration of financial issues (social work management)**

According to Perlmutter and Adams (1994), many social workers believe that social work is driven by business demands “as opposed to professional ethics.” The perceived focus on business is seen as “antithetical to social work values” (Fargion et al., 2011, p. 967). Thus, while other professions started to seek economic goals and prepare their professionals to establish their own organizations, social workers are often discouraged from engaging in entrepreneurial thinking (Bent-Goodley, 2002). Social workers need to break this ‘taboo’<sup>1</sup> of entrepreneurial mentality. It is necessary to find the way to be more financially competent, as the issue of finances is one of the biggest difficulties in social work practice. The literature shows that in many countries social workers have been increasingly required to demonstrate concrete outcomes despite limited funding. Meanwhile, in spite of operating in market environment, social entrepreneurship is associated with seeking and utilizing resources in innovative ways, and therefore it is viewed as a business for social profit (Martin and Osberg, 2007). As presented, social workers not only contribute

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<sup>1</sup> ‘Taboo’ is meant here as idealism, naiveness, impracticality, or pretence.

their values, knowledge, and skills that are applicable to social enterprise but also assume an ethical responsibility to explore, experiment with, and pursue the best possible solutions to social problems (Neal, 2015; Germak and Singh, 2009; Healy, 2002). Therefore, social workers “can be both entrepreneurial and ethical” (Bent-Goodley, 2002, p. 292).

### **The engagement of social workers in studies on social entrepreneurship (social work research)**

All of the above information suggests a need for social workers to be engaged in further research exploring social entrepreneurship, focusing on how social work’s expertise can effectively be useful and conducive to the success of social entrepreneurship. Further studies also need to see the contribution of social entrepreneurship approach to the goal of social work; the determination of the arena in which this approach will prove to be suitable; and the ways of adopting and/or adapting this approach to social work toward human well-being. The exploration of the social work-entrepreneur relation is also important, as it has been a popular trend that many social workers transform themselves into social entrepreneurs in the world nowadays, with the ambition of undertaking social work practice in a new and different way.

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## Streszczenie

### Odkrywanie praktyki pracy socjalnej w obszarze przedsiębiorczości społecznej

Przedsiębiorczość społeczna jest potencjalną alternatywą, którą należy zbadać i wypróbować w obecnych czasach. Koncepcja i forma organizacyjna zwana przedsiębiorstwem społecznym zyskała wiele uwagi ze strony środowisk zainteresowanych zmianą społeczną, w tym pracowników socjalnych, którzy borykali się z wyzwaniami dyskursu neoliberalizmu. Ten artykuł bada powiązania między pracą socjalną a przedsiębiorczością społeczną poprzez uchwycenie perspektywy praktyki pracy socjalnej w wybranych przedsiębiorstwach społecznych. Badania pokazują wzajemne powiązania i komplementarność między pracą socjalną a przedsiębiorczością społeczną, sugerując pracownikom socjalnym potencjał współpracy i przyjmowania przedsiębiorczości społecznej, bez obawy o dalsze debaty na temat spornej natury i złożonych aspektów formalnych. Wymaga to zatem dalszych badań w celu zbadania i potwierdzenia, która definicja, jakie podejście i który obszar realizacji przedsiębiorczości społecznej byłby odpowiedni w zawodzie pracownika socjalnego. Konieczne są również dalsze badania w celu odkrycia doświadczeń grupy przedsiębiorców społecznych, którzy stali się z nimi będąc początkowo pracownikami socjalnymi.

**Słowa kluczowe:** praca socjalna, przedsiębiorczość społeczna, przedsiębiorstwo społeczne, praktyka pracy socjalnej, przedsiębiorca społeczny

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From Montréal, Canada, Matthew William Biddle graduated from McGill University with a BSW before continuing to complete a master's degree in Advanced Social Work Practice through the Erasmus Mundus programme. Matthew has worked extensively with grassroot and community organisations, predominantly in the Montréal area. This has permitted Matthew to gain valuable experience working with a variety of communities ranging from adults with mental health struggles, LGBTQ+ youth, to Aboriginals experiencing homelessness.

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Hue Dao has been working in the Non-Governmental sector in Vietnam for over 10 years. Her professional experience includes disability inclusion, community development, and eye health. Hue has an interest in and a passion for research, counselling, and training. She holds a master's degree in Advanced Development in Social Work (ADVANCES-2016).

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John Ddembe graduated from the University of Lincoln (UK), receiving M.A. degrees in Advanced Social Work and Development Studies. He has led various teams in the implementation of numerous community-related projects in long-term sustainable community development for over 12 years. Currently based in Kampala, Uganda, he has conducted needs assessments, monitoring and evaluation, social research, tracer and ethnographic studies in Uganda, Kenya and Somalia. A dedicated social researcher, social worker and/or humanitarian through and through, he enjoys sports and reading.

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Articles connected with the Erasmus Mundus ADVANCES Program:

Rasell, M., Join-Lambert, H., Naumiuk, A., Pinto, C., Uggerhoj, L., Walker, J. (2019). *Diversity, dialogue, and identity in designing globally relevant social work education*, Social Work Education. DOI: 10.1080/02615479.2019.1570108

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A collection of research works concerning social work and conducted in 2015–2019 by students involved in various fields of social, educational and aid activity as part of Erasmus Mundus ADVANCES (Advanced Development in Social Work) master studies. The major asset of the publication is the presentation of different aspects of social and educational support in Poland, as well as social work and other assistance activities from the multicultural perspective in view of global changes and international education.

The texts written by authors who have practical experience gained in their own countries and who are pursuing international careers inspire discussion on different aspects of social work all over the world. Increasing mobility of researchers, practitioners and users of assistance activities forces changes in thinking about the objectives and functions of these initiatives, which should be enriched by the outside perspective. There is no better way to discuss the identity of discipline, the variety of attitudes and universality of aid standards than recognising the diversity of perceiving the same phenomena.

The researchers, students, academics and practitioners will find here many interesting issues, which can stimulate further discussions, research and social practices related to providing assistance to other people.