

## **FUTURE FOR USE OF SUB-PROFESSIONALS AND VOLUNTEERS IN PUBLIC WELFARE AGENCIES\***

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The Office of Economic Opportunity programs, regardless of our opinion as to their value or lack of value, have contributed one side benefit for Welfare Departments, namely that of helping Welfare Departments in many areas re-evaluate the nature and scope of services to be provided, and the personnel to provide these services. We have looked sometimes somewhat in askance at the indigenous outreach worker meeting the needs of his fellow man in helping him obtain services in the community. However, we have seen him re-develop total neighborhoods, mobilize individuals on whom we had given up; we have watched him transport his neighbors to services, provide care for children, go to school with his neighbor when a problem arose regarding his child, and to serve as a counselor, confessor, and assistant social worker long after the Welfare Office had closed.

We have seen the vista worker with all varying degrees of education, from high school to Ph.D., go into communities of which they were not a part, to organize, develop and build, both physical structures and human dignity, at a level not even dreamed of by many Welfare Departments. We have seen those people work day and night, Saturday and Sunday, living, eating, sleeping and growing right in the neighborhood with the people they hope to help.

We also know that some of their programs fail, through lack of sound administration, lack of supervision, lack of financial

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support, and bureaucratic jealousies. I have proposed that we can learn by observing both their accomplishments and their mistakes. With structures available in Welfare Departments and in keeping with the Mandate of 1967 Amendment to the Social Security Act we can provide an imaginative and new service for the rehabilitation, or habilitation if you will, to those clients we serve, including even the "hard core" family and its children. The 1967

amendments indicate that Welfare Departments must train and make effective use of paid subprofessional staff, with particular emphasis on the full-time or part-time employment of recipients and other persons of low income as community service aides in the administration of the State plan. State and County must plan for the use of non-paid or partially paid volunteers in providing social service. Volunteers will provide services to applicants and recipients and assist on Advisory Committee established by the State Agencies. Emphasis will be on using recipients in these positions. We can tell you from experience that effective use can be made of these same individuals on Advisory Committees and on local County Agencies, which is also required in the 1967 amendments. These requirements become mandatory upon the States effective July 1, 1969.

When we begin talking about professional, the sub-professional, the pre-professional and the new professional, we find ourselves using a maze of definitions for such terminology. The National Association of Social Work Report maintains that the Professional is the Masters of Social Work degree, with everything below this level being sub-professional. This concept is all too frequently engendered in students at the graduate level, with the net result that the special training provided to these people is frequently lost in the training and supervision of less highly trained personnel. We have noted from individual to individual in operating our programs with the M.S.W. degree that they provided a more-in-depth therapeutic type of service to clients. We also note, however, due both to the scarcity of the M.S.W. qualified person and the scope of the job to be accomplished, that people with lesser education have made major contributions. This has been accomplished by developing innate ability through the use of under graduate social work training, in-service training programs, through supervision, through experience, and by the observation of the less technically trained caseworker by the trained caseworker. In our State we generally consider the professional caseworker to be a person holding the



position of Public Welfare Worker, where the current requirements are a Bachelor's degree from an accredited college and one year of Social work experience. Since this is a recent upgrading, we have workers of less college education. Therefore, in this paper we would consider sub-professionals to be those people who are serving in capacities below that generally considered to be a Public Welfare Worker. The problems in establishing sub-professional staff are many and very real. The first problem is the threat to the already established staff when job functions are removed. One method of solving this particular problem is, while removing certain job functions from existing caseworkers, to immediately establish new, and expand upon, existing job functions of existing staff.

The dental profession is a good example of how various tasks have been assigned to various levels of staff, thus relieving the highly trained dentist for the most complicated, difficult, and involved functions of the dental profession. At the top of the ladder of course is the dentist, with his very technical skill. The dentist may be considered comparable to the skills of M.S.W. or a very experienced caseworker.

The dental hygienist, who is also considered professional, works on such functions as cleaning of teeth, the identifying of problem areas for the dentist to further examine, routine matters such as the taking of X-rays, and providing dental hygiene education. Such a position might be comparable to our existing Public Welfare Worker. The dental assistant is not allowed to work in the mouth of a patient. She prepares the dentist's office, lays out materials, takes information, and with some experience may take some X-rays. This level may be comparable to what we are thinking of as the sub-professional.

We have still the other level of work which is comparable to our steno, namely that of the office receptionist and secretary who maintains records, including financial records, answers the telephone, etc.

We see in this hierarchy of staffing, defined functions, as well as varying status of personnel. These two factors are vitally important if sub-professionals are to be any more than high paid secretarial help in a Welfare Office. H.E.W. in December of 1965 through the Welfare Administration of the Bureau of Family

Services published a booklet entitled, "The Utilization of Auxiliary Staff in the Profession of Family Services and Public Welfare" in which it suggested several levels of sub-professionals that could be used to augment the providing of social services to clients. One sub-professional is referred to as an Administrative Aide. The suggested educational qualification for this job is graduation from high school. Some of the examples of the duties of this person are to receive inquiries from clients, provide information, and to refer problems to the direct service worker. This person verifies the accuracy and completeness of collateral data used by caseworkers, maintains appointment schedules for caseworkers, keeps the workers informed of appointments and cancellations, maintains files with regard to housing, jobs, educational opportunities and other community programs. These workers keep Face Sheet data current, and other factual data in the case files up to date. They prepare forms, maintain worker controls, escort clients, and help clients complete required forms both for the agency and outside the agency.

We have used summer aides in a capacity similar to this. The summer aides took responsibility for the functions indicated above for a unit of five individual caseworkers. These case aides were usually college sophomores or juniors, but in view of the fact that they worked only summers, they did not have the time available to become involved in the higher level sub-professional functions, which we will cover below.

Our experience with summer aides was that they in fact could free more time to caseworkers to provide services. This program worked best when all caseworkers were housed in the same office and records were maintained in this room. Although this position in some ways resembles that of a secretary, it requires more client involvement in both telephone and actual contact. We, too, experienced the problem of worker fear and jealousy with the loss of functions, and solved this problem by increasing the requirements on worker contacts, service calls, and assignments of helping train the case aid.

The second level of sub-professionals referred to above is referred to by H.E.W. as the Welfare Assistant. This person has a high school education plus two years of college or two years of experience as an Administrative Aide. The functions of this job are somewhat similar to the Administrative Aide, but are more involved in providing service to clients. The duties described for this task are verifying eligibility factors in all programs by



checking the facts, reports a need for information or additional search when information is inadequate or incomplete, serves in evaluating the client's housing conditions in response to requests, and submits reports; guides, escorts, and transports children on educational and recreational trips as planned by Professional workers; processes burial claims, determines whether payments are allowable; also checks out resources such as OASDI, Veterans Administration, insurance and property records, which in summary boils down to determining technical eligibility for assistance.

The City of Baltimore, Maryland became involved in the use of this type of worker on both a full and a part-time basis when they became so far behind in their determination of technical eligibility that they were in jeopardy of losing Federal matching. Baltimore utilized school teachers, full-time and part-time. The experiences in Baltimore indicated that a basic amount of in-service training is necessary before untrained workers can carry out the functions indicated, even though these functions are clearly defined in coordination with a Professional caseworker. It was found, however, that people less than professional could determine eligibility, thus allowing more service time to the highly trained staff. The teachers brought in resources not generally available to existing staff, primarily their knowledge in Baltimore of the Educational System. Baltimore also found that the eligibility technician must be trained in the limitations of his position, thus establishing status in the agency for himself as well as for other staff.

In Muskegon, Michigan we observed the use of sub-professionals working in conjunction with Public Welfare Workers "Professional." Case Aide "sub-Professionals" had the equivalent of a high school education and were directly involved with clients in carrying out such functions as transportation, help in budgeting, meal planning, shopping, development of sewing skills, reading skills, cleaning, and house hunting. They worked directly with clients and explained the resources available in the community such as the services of the Health Department, Economic Opportunity and the Community Action Program, the Planned Parenthood Association, the Welfare Department and Private Agencies. They went with clients to Court, to visit relatives in jail, to work out contracts, etc. All of these functions were under the direction of a trained social worker.

We have observed three different units in operation in Muskegon and found that when caseworkers and case aides shared the same physical room for working, they each gained a mutual respect for the other's skills, job position, problems and solutions; thus, the service provided to clients became optimum. In this situation the professional Public Welfare Worker determined the technical eligibility and the case aide provided meaningful and real service to the client that was not within the time limits of the professional worker and frequently not within his area of skills, as for example, help in shopping, cooking, sewing, etc. Half of the case aides used in the Muskegon project were clients of the Welfare Agency; the other half were from low income families. All were from the general area being served. One of the case aides in this project had a specific responsibility of coordinating the location of housing and helping clients enter into reasonable rental agreements with landlords, thus protecting the interests and rights of each.

We noted in the Muskegon project that it is important to carefully evaluate the special skills of each professional, thus making maximum use of the specialized and technical skills of the professional. Equal care must be taken to evaluate and utilize the skills of the sub-professional. These skills, in turn, must be carefully utilized and supervised by supervisors capable of recognizing the difference in ability, expectation, assignment, and job performance. One of the problems encountered in the Muskegon project was helping supervisors accept the new approach and help staff change functions.

As we have worked through this report, we have been discussing with regularity two concepts, function and status; both are vital to the success of any program. An administrator attempting to establish sub-professionals in an already existing agency must first ferret out those tasks which can be performed by someone with less than technical Social Work training. To do this, one should take a look at the day to day tasks carried out by the caseworker. First those tasks should be removed from the caseworker which could better be performed in the clerical part of a Welfare operation. Secondly, those tasks which involve contact with clients must be looked at. Here we come to a concept called client vulnerability, referred to in the Fergus T. Monahan "A Study of Non-professional Personnel in Social Work—The Army Social Work Specialist" done in 1960. In working with sub-professionals the administrator must always keep in mind the end person being served, namely, the client. When we



talk of professionalism we think in terms of a degree of responsibility and a degree of decision-making ability based on a body of knowledge and experience which looks out for the physical and emotional well-being of the client. Obviously, sub-professionals would not be expected to deal in those areas where the client would be vulnerable, such as in family relationships, emotional problems, child adjustment problems, neurosis, and the like. Once an administrator has listed all of the various tasks currently carried by caseworkers, he must think in terms of how these will affect the clients for whom he has responsibility. He must do this taking into full consideration the skills, abilities, and trainability of those sub-professionals he is placing on his staff. Since sub-professionals require a higher degree of supervision than the professional, functions would usually be assigned to them which are more easily identified and thus easier to supervise. Some of these are spelled out in examples cited above. Since functions of the professional vary from State to State and even County to County within State, it will be necessary in the initial implementation of a sub-professional program to allow some latitude to local County Administration to decide the use of both professionals and sub-professionals. Guidelines can be submitted from a State Office level providing a framework in which these decisions can be made. There are also many rehabilitative services, some mentioned above, some seen in the O.E.O. Programs, and some in the imagination of each of us, that can be developed for expanded use of both the Professional and the Sub-professional.

We have seen sub-professionals hired with various levels of education and experience. Several Junior Colleges in the country are now offering a sub-professional two year degree in Social Services. The Welfare Departments would do well to talk with these college administrators and be helpful to them in preparing programs that would be useful to the Departments in the future.

The 1967 Amendments to the Social Security Act speak of the use of indigenous workers and clients in the capacity of sub-professionals. We have seen in the Muskegon Program where this has in fact been accomplished with excellent results. The literature points out some of the problems in taking indigenous workers and clients and making them sub-professionals, and the problems they face in working in their own communities. These problems have not materialized to a great degree in the Muskegon Project. The major problem encountered is that the client identifies more strongly with the professional worker in the agency, thus

holding his peers in contempt. The opposite of this problem is where the client over-identifies with his peer group and attempts to manipulate eligibility requirements in their behalf. Another problem is the communication problem between professionals and sub-professionals that must be taken into consideration by supervision and administration.

As we look at the use of sub-professionals we find that they are frequently most effective if used to assist clients in various tasks of development. This of course is not true if the sub-professional is used as the administrative aide discussed above, where her functions are primarily office functions for doing detail work for a group of professional caseworkers. The basic decision as to function must be made by administration. This decision will have to be based on the philosophy of service of the Agency. To me, it seems possible and practical to use both administrative aides and case aides. The Federal requirement that we employ clients offers a real challenge to Departments. We immediately became concerned about confidentiality. There are currently three prior clients in our agency and this has not posed a serious problem. Again this is involved, as it is with all employees, in explaining the functions and expectations of the agency. We do not see a major problem in hiring clients as stenos, sub-professionals, and caseworkers, if they can qualify or be trained. In some cases this step will require patience, understanding, and effort above that which we may usually expect to expend on a new employee. Let me assure you that the results are worth the effort.

In Kalamazoo County we have also had experience in working with clients in our Citizen's Advisory Committee. This has been true for the past two years. Prior to that time, this Committee was made up almost entirely of private agency executives, leading citizens of the community, college professors and the like. The addition of clients to the Advisory Committee brought the reality of living in poverty directly to these community leaders. It also brought to the attention of the Welfare Department some of the attitudes, feelings, and problems being experienced by clients, which otherwise do not reach administrative levels. Kalamazoo County has had clients work as Volunteers with other clients, in specific job functions. The Citizen's Advisory Committee to the Kalamazoo County Department of Social Services has as one of its numerous projects, a Volunteer Service group, which works directly with families on Public Assistance. The



Volunteer is considered to be a treatment force in working with families and is expected to meet the problem that the worker and the client have identified. The Volunteer works with only one client family at a time, and with the full knowledge and acceptance of the client. A great deal of work is done in the orientation of Volunteers as to the role of the agency and the expectation of the Volunteer, before contact is made with clients. The professional worker and the volunteer meet, before the volunteer meets the client. Job expectations are carefully spelled out for the volunteer. Those clients who are encouraged to use volunteer services are those that have special needs. These needs may be to provide for children, such as babysitting while the mother is shopping, reading for the children in the home where the mother cannot or does not read, taking children from the home to the Nature Center, park, museum, ball games, library, children's plays, recreation, etc. Volunteers also serve children with special needs, such as providing transportation for children to Clinics, therapy for individual children, tutorial help, or helping obtain scholarships for promising youngsters. In addition, volunteers provide friendship, conversation, information about the community to new and old families in the community. They also help mothers in cooking, sewing, food purchasing, budgeting, house cleaning, or other areas where volunteers have specialties which are of service to clients. Volunteers are encouraged to encourage clients to make use of community resources, to attend school conferences, to attend Home and Family Living Courses, as may be appropriate to the needs of the family. They also give services to families in helping them to obtain housing, legal services, or generally acquainting a new family to the community; for example, tell them where to shop—maybe even better, where not to shop—how to obtain health services, recreation, etc. Many of these services are better provided by fellow clients, when clients serve as Volunteers, than they are by middle class Volunteers. The volunteers and caseworkers maintain regular contacts and the professional caseworker transcribes a summary of these contacts into the case record.

We have been able to operate this Volunteer Program, which involves some 60 volunteers, through the efforts of administrative staff and a single Volunteer Co-ordinator who is instrumental in setting up, with the help of the casework supervisors, the training programs and the on-going supervision of volunteers. This Co-ordinator, Mrs. Amy DeFree, was also responsible in helping set up the State Demonstration Project in Ingham County

which has now developed into a more sophisticated volunteer type service.

The Federal legislation talks about paid volunteers and it is my opinion that if there were an amount of money that could be made available to volunteers to cover their cost of transportation and babysitting costs rather than a "salary", we would be able to recruit a larger number of mothers who have a block of time they could provide but who are encumbered in using this time because of plans that must be made for children. I would strongly favor a program which would provide pay for these volunteer services which we have found extremely valuable to our clients and to our agency. An expense voucher program would be much easier to administer than a salary program. It would also continue the concept of being a volunteer, rather than an employee. This concept is important to both the client and the volunteer. Needless to say, programs of this type have the same problems of task determination and status recognition that exist as we discussed earlier in this report. We found that when we had carefully defined the role of both the volunteer and the professional, conflict ceased to exist between these two, and meaningful service is provided. In the programs we have observed and discussed, both volunteer and sub-professional, we see services to clients being offered beyond the 8-hour day and the 40-hour week. This is a necessary change if we are to serve clients. Even more important is placing staff where the people are, in the neighborhood, rather than in an ivory tower, where too many agencies are now housed. We must send both the professional and the sub-professional to the people if we are to really help the clients help themselves, which is the business we are in.

In conclusion, it is with a great deal of enthusiasm that I view the potential offered in the 1967 Amendments. There is a great deal to be done for, with, and in behalf of clients and we must recognize that there are others who can share in the helping profession. I would encourage those who are interested in initiating sub-professional positions or volunteer positions to utilize the experiences of agencies referred to in this report, as well as the very good materials prepared by the United States Department of Health, Education and Welfare, namely, "Utilization of Social Work Staff with Different Levels of Education for Family Services in Public Welfare and Selected Illustrative Job Specifications for Local Agency Personnel" published December 1965. The other booklet, "Utilization of Auxiliary Staff, Provi-



sion of Family Services in Public Agencies" was also published December, 1965 by H.E.W.

I see great potential in both the use of the sub-professional and the volunteer in the field of Welfare in the years to come. I have shared a few with you. I challenge you to use your imagination and resources and develop many more.