Eligibility for social services: social policy development in an international context

Elegibilidade para serviços sociais: desenvolvimento das políticas sociais num contexto internacional

Éligibilité aux prestations sociales: mise en œuvre des politiques sociales dans un contexte international

Elegibilidad para servicios sociales: desarrollo de las políticas sociales en un contexto internacional

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ELIGIBILITY FOR SOCIAL SERVICES
Social policy development in an international context

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Abstract   The article[1] provides a frame of reference for reviewing the basic processes underlying the development of formal social policy. The bases for the article were provided by: (1) review of the literature in related social services policy development areas; (2) analyses and review of the literature specific to service eligibility; (3) analyses of related socio-economic data from international organizations and registries. Eligibility is proposed as an essential element of social services within the context of citizens' rights, cultural mores and customs, political processes and economic conditions of the six contributing countries. These data sources were augmented by review of summary narratives of the history and status of social services development.

Keywords: eligibility, social policy, social work.

Resumo   O artigo apresenta um quadro de referência para a revisão dos processos fundamentais subjacentes ao desenvolvimento de políticas sociais formais. O artigo baseia-se em: (1) revisão de literatura das áreas de desenvolvimento das políticas de serviço social; 2) análise e revisão de literatura específica sobre a elegibilidade dos serviços; 3) análise de registos e dados socioeconómicos de organizações internacionais e registos. A elegibilidade é proposta como um elemento essencial dos serviços sociais no contexto dos direitos dos cidadãos, costumes culturais e valores, processos políticos e condições económicas dos seis países contribuintes. Estas fontes de informação foram ampliadas pela revisão de resumos de narrativas da história e estado de desenvolvimento dos serviços sociais.

Palavras-chave: elegibilidade, políticas sociais, serviço social.

Résumé   Cet article présente un canevas pour la révision des processus fondamentaux qui sous-tendent la mise en œuvre de politiques sociales formelles, en se basant sur : (1) la révision de la littérature des domaines de développement des politiques de protection sociale ; 2) l'analyse et la révision de la littérature spécifique sur l'éligibilité aux prestations ; 3) l'analyse des fichiers et des données socioéconomiques d'organisations internationales. L'éligibilité est proposée comme un élément essentiel des prestations sociales dans le contexte des droits des citoyens, des habitudes culturelles et des valeurs, des processus politiques et des conditions économiques des six pays contributeurs. Ces sources d'information ont été

élargies par la révision de résumés de récits de l'histoire et de l'état de développement des services sociaux.

Mots-clés: éligibilité, politiques sociales, prestations sociales.

Resumen   El artículo presenta un marco de referencia para la revisión de los procesos fundamentales subyacentes al desarrollo de políticas sociales formales. El artículo se basa en: (1) revisión de literatura de las áreas de desarrollo de las políticas de servicio social; 2) análisis de la revisión de literatura específica sobre la elegibilidad de los servicios; 3) Análisis de registros y datos socioeconómicos de organizaciones internacionales y registros. La elegibilidad es propuesta como un elemento esencial de los servicios sociales en el contexto de los derechos de los ciudadanos, costumbres culturales y valores, procesos políticos y condiciones económicas de sus países contribuyentes. Estas fuentes de información fueron ampliadas por la revisión de resúmenes de narrativas de la historia y estado de desarrollo de los servicios sociales.

Palabras-clave: elegibilidad, políticas sociales, servicio social.

Purpose

The purpose(s) of this article are to: (1) propose a functional framework for understanding and impacting the basic social policy development processes; (2) review and discuss concepts and perspectives of service eligibility as a seminal element of social policy and services delivery with consideration of the factors and forces, which influence service eligibility definitions and applications within social policy development processes; (3) illustrate the range of national socio-economic indicators of social priorities and policy development; and (4) propose implications for social work professionals and related personnel preparation programmes.

Introduction and background

Reforms of social services have occurred, and are continuing on national, multi-national and global levels. The evolvement of neoliberal economic-political models affecting the development of human services has been a significant factor in this flux of definitions of social policy, citizen rights, program philosophies and goals, service eligibility criteria, program definitions, quality indicators and program evaluation standards and fiscal support processes. The primacy of market based, cost benefit oriented models over value-based, person referenced planning approaches is of concern to many constituencies. While the utilization of neoliberal economic models has been international in scope, their application is affected by the socio-political conditions, economic status and cultural mores on a country specific bases. The complex, inter-related variables which underlie social services delivery processes present major challenges in service design and implementation (Guarneros-Meza & Geddes, 2010; Liebenberg, Ungar & Ikeda, 2013; Parnell & Robinson, 2012; Wallace & Pease, 2011; Wiggan, 2012). Understanding of these social, political, and economic processes is critical to influencing policy development, the definition of social services. Implications for research, personnel preparation and service delivery in social work areas are both pervasive and clear. Social work, as a discipline, must empower itself to impact on the

basic processes which define social policy if it is to meet its leadership obligations and opportunities.

It is assumed that the primary goal of any system of social services and supports is to contribute to the capacity of individuals to achieve the highest possible levels of self-determination, civil participation and social inclusion. It is recognized that individuals must be supported in empowering themselves. Further, it is posited that rights and protections for vulnerable persons are recognized and provided within the context of more general socio-economic conditions. Ben-Ishai (2012: 153) suggested that "Our status as autonomous agents is often constituted by larger social relations that configure the distribution of recognition and respect in our society: institutional, cultural and market relations, among others". Thus maximizing levels of self-determination and social inclusion is a commonly accepted mission of social services and is considered basic to a positive quality of life.

Social inclusion has been promoted by European Union projects in the 1970s-1990s and was associated with politics and policy at the beginning of the 2000s (Peace, 2001; Wright & Stickley, 2013). The term "social exclusion" is used to identify individuals, groups or entire communities to be disenfranchised, and is commonly associated with poverty, unemployment, inequality and disadvantage (Wright & Stickley, 2013). Economic and social inequality and unattainable wealth are viewed as causes of social exclusion (Wilkinson, 2005; Marmot, 2010; Wilkinson & Pickett, 2010). Some researchers consider social exclusion as the inability of people to exercise their full rights of citizenship (Burchardt, Le Grand & Piachaud, 1999; Sayce, 2000). Sen (1999: 74) notes that "inclusion is characterized by a society's widely shared social experience and active participation, by a broad equality of opportunities and life chances for individuals and by the achievement of a basic level of well-being for all citizens". Exclusion can take place through practices and processes that are embedded in cultural mores, conventions and traditions, legal codifications, and religious beliefs.

History suggests — e.g. Will and Arial Durant as notable historians — that these cultural values, conventions, traditions and customs are the primary indexes of societal capacity to respect diversity and promote social inclusion. These factors may be far more rigorous in determining the ultimate impact of social policy and legal enactments than the law itself. When custom and convention are coupled with religion (providing a supernatural or divine credentialing base) their integrated effect supersedes legal standards and constitute the essential determinants of the real impact of social policy initiatives. This points to the need for broad continuing public awareness and education programs.

The development of social policy and the initiation of social services for vulnerable populations involve fundamental political and economic processes basic to representational governance processes and structures unique to each country. Thus public policies regarding the commitments to social services are not within the purview of social work or any professional discipline. Professional program planners, advocates, social activists or service providers intending to affect public policy development must be aware of and understand these basic processes, and how to access them, if they are to influence social policy development processes; or

to have impact on decisions regarding program authorizations and fiscal appropriations. Elective bodies are constantly bombarded with competitive, conflicting proposals and requests from vested interest groups (lobbyists). Social work professionals must be knowledgeable of the basic processes involved, the formal and informal points of access to the process and options for building political "credit" and credibility.

A functional framework for social policy development

The three primary areas common among countries having national representative governance structures and processes which define public policies and program authorization are: (1) executive functions usually associated with the office(s) of elective national presidents or prime ministers; with attendant departments and agencies; (2) legislative (political) processes usually associated with elective bodies such as senates, parliaments, houses or *dumas*; with attendant committee supports; and (3) judicial or legal functions usually associated with the systems of federal or supreme courts and related regional, state or district levels of jurisprudence; with attendant involvement of states attorneys and other legal counsels. These three areas of function, decision making, and influence, constitute a combined Iron Triangle, which defines public policies, provides for all programme and fiscal authorizations, and provides the mechanisms to test the constitutionality or legality of executive or legislative actions. This is in accordance with the balance of power concept basic to representative governance. The importance of these three spheres of influence has historical precedence, e.g. Montesquieu, an early 18th century, French political philosopher, championed the concept that this balance among the three spheres of influence provided the best base for individual liberty.

The combined effects of these basic spheres of function provide the essential basis for all systems of public social services. Implementation of the programmes authorized via these processes leads to the need for regulations, program and fiscal management structures, with accountability or compliance standards and procedures. This produces the much maligned "bureaucracy". This bureaucracy should functionally support and guide the implementation of direct services and supports. This support of direct services and supports for improving the quality of life for vulnerable persons should the *raison d'être* for the bureaucratic administrative entities.

It is proposed that these spheres of influence represent a functional framework for reviewing the processes involved in social policy development. Social policies are developed (proposed, debated, enacted and tested) within the Iron Triangle of Executive, Legislative and Judicial or legal functions. Direct services, interventions and supports (best practices) are delivered within the context of administrative structures and procedures developed to facilitate programme implementation. Thus the inclusive framework for delineating policy and their relationships to administrative functions and direct services may be summarized as the following:

— executive leadership functions in domestic and international domains commonly associated with the office of national President or Prime Minister; with supportive departments, agencies and offices;
— legislative/political processes which define social policy via statutory enactments to authorize program development, provide fiscal support, and designate administrative responsibility;
— judicial/legal processes and procedures which interpret and define constitutional intent and legal status of rights and services, including provisions defining citizens' rights and protections;
— administrative/management and evaluation models, structures and procedures in programme and fiscal areas;
— implementation and provision of direct services, life opportunities, interventions and supports to vulnerable persons and populations.

Each of these spheres of influence or contribution is an integral part of the social policy, and subsequent service development process. However, it is the collective effect of *first three spheres* of influence which provide the policy basis for service program development, with the executive leadership and legislative spheres authorizing and appropriating funding for programme implementation. *The fourth sphere* provides the management, administration and evaluation supports facilitating the delivery of social services and supports to vulnerable citizens. *The fifth sphere* provides the actual direct protections, supports, interventions and services which determine the life opportunities and the quality of life for vulnerable people.

The following summary discussion of the proposed framework for social policy development is based on the field experience of the primary authors and extensive input from stakeholders or service recipients. This provides the basis for the assumptions and conclusions posited. Since the essential processes are generic there is a diversified body of related research which would be cited in more definitive follow-up research.

Related major considerations

As previously noted, factors such as cultural mores, embedded social customs and conventions, and religious biases, myths or beliefs within each country must be considered. The influence of culture in social and health care as a core issue is noted by a number of researchers (Andrews et al., 2013; Kao & Travis, 2005; Ramos, 2007; Ruiz, 2007). This suggests that programmes of public awareness and education must be implemented to foster and promote real social inclusion for vulnerable persons. An informed and participating citizenry is essential to social activism in policy areas. Ergo, programs of public education are essential to an informed citizenry sensitive to the rights and needs of vulnerable persons; particularly in areas such as community-based service development and social inclusion.

Laws, in themselves (either statutory or judicial) do not ensure a society responsive to the requirements for true social inclusion based on respect and human

values for all its citizens. To illustrate, no one would seriously suggest that the caste systems of India, with the range from Brahman to Shudra, to Untouchable; which endured as the only sustained governance structure for over 2500 years, would be summarily dismissed by a seemingly arbitrary legal mandate. It is far too woven into the religious, legal and civil fabric of the culture of the country. Such belief systems involve the religious, legal, pedagogical and civil elements of its culture. As such, they represent the core values or moral fiber of the society.

Nor should it be anticipated that consequences of the historically negative social values and practices of long-term institutionalized devaluing and segregation of people of color in South Africa will end with enactment of a new statute or promulgation of a new policy mandate. Neither the institutionalized bureaucratic corruption (considered as just "the cost of business") by many Russians nor the influence of the Italian Mafia will end with a new proclamation of legislative intent. Over 150 years after freedom for slaves and fifty years after the enactment of national civil and voting rights legislation, America is still struggling to fully enfranchise a significant segment of its population. These illustrations hint at the range of socio-cultural factors which affect social policy development and service delivery.

This does not in any sense negate the value and purpose, and the promise of statutory provisions (legislative law). These political processes are basic to countries with representative governance structures and procedures. As such, they provide the most fundamental formal definitions of social values, priorities and policies. In the vernacular, they are the "only game in town" for development of formal statutory social policies.

Nor should the role of the courts and related legal systems be minimized. The judicial/legal system should protect the rights of all citizens in a society as well as penalizing those who violate its laws.

Actualizing the promise of national policy enactments must be supported by equivalent attention to the laws and ordinances, enacted at the regional, state, and local or municipal levels. Such laws and ordinances may be in direct conflict with the national provisions and be coercive in failure to recognize the status, human dignity and rights of minorities or other devalued groups. In some instances, e.g. South Africa, a minority had disenfranchised the majority of the population. Cities adopting some version of "sundown laws", i.e. laws which prohibit representatives of a particular racial or ethnic group from being in town overnight or after sundown, illustrate the nature and effect of such local jurisdictions.

The communication, trust and decision relationships existent at the direct points of service "delivery" constitute the basic tests of whether the social policy initiatives are appropriate and effective. Lipsky (1980) proposed these relationships as embodying a "street level bureaucracy". Early recognition of the importance of this street level bureaucracy as essential determinants of the effects of social policies was confirmed by Lasswell (1958).

A number of researchers have authored discussions of the implication of street level bureaucracies to staffs of particular service programmes, e.g. Proudfoot & McCann (2008). These applications were in the areas of urban change processes. Evans (2010) extends the discussion of street level bureaucracies and their relevance to

professional discretion in staff function. The need to functionally support direct service staff within these processes is discussed by Keiser (2010) and Rowe (2012). Lipsky (2010) suggests additional qualifications from the original conceptual formulations.

These summaries illustrate the complexities inherent in the processes determining the real effects of formal social policies. Social advocates must be aware of the range of the challenges complicating the social services development processes.

Eligibility within Social Service systems

Since service eligibility is a keystone to social service planning and development, its concepts and application must be considered at all levels of policy development, administration practices, and direct service delivery. On this basis, it was proposed as an illustrative element of social policy development; with discussion regarding the variables and factors influencing its definitions and applications.

The complexities and interactions of the multiple variables within the policy development framework, i.e. executive, legislative, and judicial/legal spheres, are critical to the definition and application of eligibility standards and procedures. The management models ensuing must reflect the perspective and intent of the product of these fundamental policy processes. Obviously, the appropriateness and effectiveness of direct services should be indexed to the needs of the eligible populations.

From a general perspective, eligibility is a multi-faceted concept with diverse interpretations and applications. Generic dictionary definitions focus on necessary or required qualities and conditions (*Oxford Dictionary*, *Cambridge Advances Learners Dictionary and Thesaurus*). Applications of the concept of eligibility may be complementary or competitive at national, regional or state and local levels. Definitions differ widely among public or private and non-governmental organisations (NGO), non-profit organisations (NPO), and for profit organisations (FPO). These definitions reflect the constitutional, statutory and case law influences and enactments in the respective countries. Again, cultural mores customs, traditions and religious biases may be affective. Specific indices may include or reflect: (1) citizenship status; (2) place of residence; (3) age; (4) sex or gender; (5) income or financial status; (6) race or ethnicity; (7) disease or disability; and (8) political or religious affiliation.

Logic and ethics suggest that service eligibility should be conceptualized within the context of citizens' rights of each country and reflect its social inclusion processes and practices. In practically all participating countries services general service eligibility may require national citizen status in the country of residence; with special consideration in areas such as immigrants, refugees and migrant workers. Marshall (1950) proposed three basic types of citizenship rights that combine to give full citizenship status: (1) civil, (2) political and (3) social. *Civil rights* provide for the freedom of individuals to pursue their goals for full participation in

society. *Political rights* support the freedom and responsibility to participate in free elections and political processes. *Social rights* were proposed as the protections of the individual from the consequences of factors such as industrialization and capitalist expansionism. Social theorists commonly view the right to work and full equality in the job market, full access to health and education services and welfare benefits (including old age and disability pensions) as fundamental social rights (Dudwick, 2011).

Just as eligibility is an integral part of a set of the complex relationships and processes basic to the evolving Social Service system(s), the philosophical right to services concept may be embedded within the context of broader citizen and individual rights. Actualizing these rights for all citizens has been a priority in many countries. For example, building toward inclusive social welfare systems in countries such as India and South Africa have become an imperative to support the on-going socio-cultural changes and to mitigate the risk of widening the gap between the rich and the poor.

Service eligibility involves citizens' rights and obligations, basic human rights and is frequently based on constitutional protections, social policy commitments, as well as political and economic processes and conditions. The consequences of decisions regarding service eligibility affect the inclusionary status and, consequently, the basic quality of life of all vulnerable individuals and groups.

Eligibility issues are key to the identification of people to be served, the services to be available, the management models used to ensure service accessibility, the quality control mechanisms or compliance standards employed, and the fiscal procedures supporting service delivery. This appears constant in both public and private sectors. Since definitions of eligibility may be used as administrative tools to limit service access as a means to regulate programme costs, they are of paramount importance within the policy determination processes.

In summary, service eligibility criteria and processes are viewed as fundamental to the planning and implementation of all social services. Eligibility is the defining base for decisions regarding which individuals and groups shall receive services and supports. It represents the lifeline for vulnerable people in need of opportunities, services and supports. On this basis service eligibility merits and requires investigation and understanding. It is useful to conceptualize the processes and factors affecting eligibility issues within the social policy and service development framework.

Eligibility research component: objective and approach

The objective for this component of the current investigation was to accomplish a systematic review of the literature regarding concept(s) of service eligibility within an overall framework for the social policy development, service planning and provision; with emphasis on citizens' rights. This review was intended to explore the scope and content of extant literature (published in English) among the participating countries, beginning with the year 2009 related to the variables effecting

eligibility criteria and applications. Formal comparative analysis among the participating countries was not proposed. The articles identified and reviewed were not subjected to assessment or evaluation in areas such as validity of the theoretical constructs involved or the efficacy of research design(s) employed. Such evaluative protocols and procedures were outside the purview of the current preliminary investigation specific to the scope and focus of articles related to service eligibility. Such evaluations could be the foci of further research. Further research could also focus on literature searches from multiple data registries, development of protocols and procedures for comparative analyses among countries, and reviews of the literature in the primary language(s) of the participating countries.

The present review of the literature included EBSCO (selected as a representative data registry) articles published during the period of January 2009 through March of 2014. Given the common time lag between research and publication, it was anticipated that this period would reflect an approximate decade of inquiry. The research focused on the published (in English) articles of the three member nations of the EU: Finland, Italy, and the United Kingdom (UK) and three non-European Union nations: India, Russia and South Africa. The key descriptors for literature searches were: (1) eligibility plus citizens' rights; (2) eligibility plus country; and (3) eligibility plus social services, plus country. Since social policy develops within the context of broader socio-economic variables, analyses of data from related economic and human development areas were performed, e.g. Gini index, human development index, and indicators of quality and access to education. This project research included review of statistical data from related international organizations, e.g. The World Bank, International Labour Organization, United Nations, International Monetary Fund, and International Social Security Administration.

General results of the literature search(s)

Review of the literature from the six (6) countries participating in the study referenced to the three levels of key descriptors obtained the following:

Key descriptors: eligibility plus citizens' rights

Nine articles were identified as relevant to the research topic. None of the articles had direct relationship to any of the participating countries, i.e. European Union (EU) members Finland, Italy, and the United Kingdom or non-EU countries India, Russia and South Africa. Seven of these articles were referenced to issues and programs in the United States of America (USA), e.g. employment of people with disabilities, right to vote as a presumptive right of the mentally disabled, right to receive food stamps, stem cell research, limiting access to certain types of contraceptives and access to fertility treatment. Citizenship rights for migrants in Canada and gender inequality in Pakistan were addressed in one article in each area. The relative paucity of research reported may be considered as establishing a priority

for related investigation(s) and dissemination patterns and practices. It may also suggest that service eligibility was not considered from the perspective of human or citizen rights.

Key descriptors: eligibility plus country

These searches obtained a wide variance of country-specific responses, e.g.:

Finland	14
India	80
Italy	111
Russia	4
South Africa	64
UK	330

A relationship between the general level of English fluency (affecting the translation and entry process) and the levels of inclusion in the data systems may exist. The criterion that selected articles must be in English translation affected or limited the data pools. There may be a wealth of potentially useful data which is not accessed via current EBSCO registry entries. The record of publications in the Russian Federation may be affected by the relative recent development of sociology and social work programmes during the post-soviet era, i.e. beginning with the 1990s, sociology and social work as a licensed profession did not exist in the USSR.

Key descriptors: eligibility plus social services plus country

Searches identified sixty five (65) articles; with the topical content illustrated by health care, aging or gerontology, HIV-AIDS related issues, programme evaluation, mental health, alcohol and drugs, psychology and psychotherapies, housing, immigration, and emigration.

Summary review of literature and discussion related to variables effecting service eligibility

Recognizing that the philosophical premise that rights underlie services is not universally accepted, the current authors suggest that the philosophical underpinnings for the design and development of human services are based on fundamental human and civil rights. It is assumed that all citizens have the rights to basic protections and deserve opportunities for social inclusion and civil participation. It is further assumed that the dignity and value of the individual must be recognized and that focusing on the intended human impact of service goals will increase the probability that services with real life opportunities to improve the quality of life of vulnerable persons will be the outcomes. Cost analysis does not index human impact. Shifting to value and rights based service development models and practices

must consider the entrenched political and social patterns, and economic factors, traditional cultural mores, punitive or discriminatory legal codes, and the religious tenets common to the respective country. This, however, is a desirable goal, e.g. South Africa's efforts of transformation from a society, based on institutionalized segregation toward a "rainbow nation" in recent decades is a case in point (Boaduo, 2011; Beall, Gelb & Hassim, 2005; Elirea, 2006; Siphamandla, 2008).

Service eligibility must be considered in relation to three related terms: entitlement, availability, and accessibility. The basic process appears to involve *eligibility* (*entitlement*) → *availability* → *accessibility* = *real service outcome.* Further, the outcomes of social services need to be considered across three domains: quality of care, quality of life and system efficiency (Freeman & Peck, 2006; Nies, 2006; Peach, Cook & Miller, 2013).

The concept of *entitlement* represents a unique type of eligibility linked directly to citizen rights. The philosophical assumption is that groups of people have a basic right to protections and services based on the status or characteristics of the group specified and the types of services to be provided, e.g. age or health. Not all services are entitlement based. Only the services considered a basic right and not contingent on other conditions or qualifications are viewed as entitlements. For example, eligibility may be based on the assumption that all people have the basic right to medical or health services. The assumption that all children and youth have a basic right to free appropriate public educational opportunities further illustrates the concept of entitlement. Thus entitlement rights based eligibility may be very inclusive and may serve major segments of the population. As such, they may require major budget commitments.

A particular type of eligibility or entitlement applies to groups such as international refugees. The massive migrations of nationals among the nations of the Near or Middle East and North Africa document the need for international responses to the need to provide basic subsistence and medical care to major populations of refugees. These conditions illuminate the need for multi-national service eligibility qualification or entitlements and service responses.

Availability is the existence of services which are potentially usable by a vulnerable individual or group, i.e. whether or not the service actually exists. There may be high levels of service density in urban areas with limited or no availability in rural or sparsely populated areas. Service planning may not be referenced to life span learning and development with needs which may range from pre-conceptual genetic counselling to infant stimulation to gerontological programmes; and may include services in medical or health, educational, psychological, sociological and basic subsistence areas.

Accessibility is determined by whether or not those who qualify under the eligibility criteria actually receive or use the service. Thus *access* can be defined as the actual use of services and everything that facilitates or impedes their use. It is the link, the point and time of contact between the services' system and the persons they serve. An important measure of program effectiveness should be whether or not the services have been available to and accessed by those persons they were designed to empower or support. Again, the goal is to improve their self-determination, social

inclusion and quality of life. Determinants of accessible services are those factors which make them geographically available and readily accessible. Services are judged to be adequate when "the organisation of care meets the clients' expectation" (Obrist et al., 2007). Accessibility is basically how easily people who satisfy eligibility criteria are able to claim or utilize their benefit(s). Accessibility reflects the policy goals of a specific country responding to social issues and is defined in the programme frameworks of the country. Individual eligibility characteristics, e.g. disability, age, financial status and chronic illness, must be considered.

For *accessibility* the services must be located within a reasonable distance; be available in a timely manner; and be provided on a schedule when the intended beneficiary of the service is able to use them. To illustrate, most service offices or service sites are open only during the same periods of the day when potential clients or caregivers may be employed. Re-defining the "workday" for service staff may be appropriate. Inconvenient time scheduling or locations can be a barrier to accessing services (Coleman, 2000) as well as a lack of available transportation, especially in suburban and rural areas (Whittier, Scharlach & Dal Santo, 2005). Therefore, services must be accessible in time and place.

Given the services are both available to and accessed by the intended recipient the matter of outcome or impact evaluation becomes critical. Is the service both effective and appropriate? Does it contribute to improvement of the quality of life of persons and the family and promote social inclusion? Do the services provide real life opportunities? Are stakeholder evaluations to be included and considered? Is "consumer satisfaction" considered important? The question of cost effectiveness has become an increasingly important issue. However, services may be efficiently managed with excellent records of cost effectiveness and yet be inappropriate and lacking in positive impact and contribution.

From the viewpoint of the person being served, services are judged to be adequate when "the organisation of care meets the clients' expectations" (Obrist et al., 2007). This position is referenced to the need for programme evaluations to include appropriateness, effectiveness and satisfaction ratings by the persons receiving the services in the programme evaluation designs and procedures. It points to the need for involving the intended recipients (stakeholders) of the services in planning and development processes.

Thus eligibility, though a critical element of the service matrix, is rendered meaningless unless accompanied with programme availability and accessibility to appropriate services and supports. Again, persons may be eligible for the service; the service may exist (availability) but the service may not be used (accessed) due to such factors as geographic isolation, time schedule and cultural or social status.

In some cultures, e.g. Italy and Russia, the family is expected to be the first or primary service support; sometimes to prevent institutional placement, with formal community services as a second line of support. In these situations, family status is the eligibility criterion. In some cultures this "familism" (family responsibility in caregiving), especially in case of multiple generational households may actively deter use of formal services (Mutchler & Burr, 2003; Delgadillo, Sörensen & Coster, 2004; Ruiz, 2007). Demographic trends, such as decreasing family size, weakened

inter-generational bonds, and increasing participation of women in the workforce have eroded the family service base. Women have traditionally been the major source of family caregiving (Leow, 2001; Mason, Lee & Russo, 2006; MCDYS, 2006, 2007; Ng, 2007;Ng, Westgren & Sonka, 2009).

Economic factors (cost) have become a paramount consideration. Concerns may include: to what degree can a society afford the costs associated with meeting the economic demands created by the rights based entitlement commitments to relatively huge service populations? Some countries view that relatively massive entitlement costs may be a major contributing factor leading to potential national bankruptcy. Containment or capping of costs is considered essential to programme continuance. How to achieve fiscal limits without compromising eligibility or entitlement rights is a basic issue. These economic realities apply at national, state and municipal levels. The combinations of health and retirement costs; together with related legacy benefit costs for a broad range of public employees, e.g. teachers, police, and firemen are viewed as unsustainable and may lead to bankruptcy of public agencies and political jurisdictions.

Applications of level funding, funding caps, and cost reduction based planning procedures are particularly stressful in areas of service with a high rate of increase in service needs, e.g. gerontological services. Increases in life expectancy, together with the demographics of reduced birth rates and early retirements, result in a marked increase in the percentage of the general population within the categories of service or benefits eligibility, while the traditional fiscal support base may be eroding. Ergo, providing improved health services promotes increased life expectancies with concomitant expansion of service needs to the aged population. This occurs while the costs of both health care and services to the aged populations are markedly increasing; with the priority to curtail or control costs in both areas.

Needs based eligibility programmes frequently require adjustment to prevent the fostering of welfare dependency for major segments of the population. What may be intended as limited term supports to assist people through crises, may become life span dependency support programmes; frequently on a multi-generational basis.

Eligibility criteria may serve a gatekeeping function by granting access to some but denying services and benefits to others. Not all vulnerable people can access services even if they are available (Guzzardo, & Sheehan, 2013). Immigrants and minority groups, for instance have numerous barriers in the use of formal services; particularly in language areas (Delgadillo, Sörensen & Coster, 2004). Other factors deterring service access include lack of knowledge about services (Delgadillo, Sörensen & Coster, 2004; Gelman, 2003; Ramos, 2007), fear of discrimination (Delgadillo, Sörensen & Coster, 2004; Gelman, 2003), and frustrations with service providers (Gelman, 2003).

In the last two decades, especially in developed countries the problem of young men's reluctance to use social services due to stigma, distrust of professionals and other reasons has been noted (Armstrong, Hill & Secker, 2000; Biddle et al., 2006; Richardson & Rabiee, 2001). The services provided to non-citizens may differ significantly in the matter of providers (usually non-profit organisations), times (most often time limited or just once), and space (in exact place).

Eligibility for and access to services is frequently not unconditional. Eligibility is related to experiencing the contingency and according to Twine (1994) is not related to the income or economic status of the person. They may involve the concept of contingent rights but may require contingent contributions.

As noted demographic factors place stress on the ability of national, states and municipalities to respond to both rights based commitments for services and the realities of finite fiscal resources. Increased life expectancy results from improved health care and improved quality of life. In some participating nations, e.g. Finland, the birth rate is decreasing. These two conditions result in the aging of the population with significant increases in the number of elderly persons eligible for services; accompanied by significant decreases in the number of persons contributing to the financing streams or tax base to meet the costs for very real needed services. Earlier retirement from remunerative, and tax paying, employment places further stress on fiscal support areas. The conditions of increased life expectancies and reduced birth rates result in more and more people eligible for services and fewer and fewer people contributing to the revenue base to support these services. Capping these spiraling programme costs is a major challenge at national, state and local levels. Therefore, eligibility for some specialized services may be based on a condition, e.g. disability and economic status (Hollenweger, 2010).

Early policy researchers made a priori assumption that the state was the sole focus of social policy. This led to the view that state-based dictates were the sole basis for social policy development. This approach was supported by the large-scale politicization of social factors which occurred during the later nineteenth and early twentieth centuries. Max Weber posits that this led to the bureaucratization of management and the development of complex administrative functions of the state.

Eligibility criteria can both define the intended client group to be served and provide a means of managing demand within finite resources (Burton, 1997). By applying certain contingencies and procedures the pool of those eligible for services can be broadened or narrowed to the desired level. These conditions apply to non-entitlement programmes actions. This has led to the realization that denying the interpretation of basic or constitutional rights provisions (entitlement) is a necessary precursor to denying of service. Given reduced budgets and expanding service populations the basic decisions relate whether to reduce levels of service or to reduce the potentially eligible service pool. An alternative option is to find more cost-effective ways to provide the needed services. Bureaucratic inertia is a primary impediment to the latter effort.

Priorities for cost containment or reduction and perceived failures in the public agency sector illustrate the factors which led to increased market (private sector) structures in service provision. The expectation was that such market based services would cost less and be more accessible. Some no-cost to the person services could be provided by networks in local communities. Other services might be available on a cost basis. The users would have the right to choose which services to access and to select the service provider (Otto & Ziegler, 2006). This approach involves a basic level of self-determination and personal responsibility. Eligibility remains a key factor.

A common strategy in many countries is to tighten the eligibility criteria on a level of need basis, i.e. only the greatest perceived acute needs receive attention and subsequent service responses. Russia, for example considers this approach as fundamental to service development. The intent is that services can be selected and controlled, but with the probability that some services will be terminated (or never offered) with disregard of user defined needs and preferences (Cowden & Singh, 2007). Again, eligibility criteria are used to regulate both potential service populations and the scope of services to be provided.

For example, within the areas of health care and disabilities, a person may (or may not) be eligible for access to a range of service options: (a) drugs and treatment, (b) health insurance, (c) assistive technologies, (d) specialized programme placement, and (e) specialized interventions in educational environments. Individuals can be identified as eligible for: (a) special health care, (b) special supports in a given setting, or (c) be eligible on the basis of belonging to a specified group requiring special interventions and environments (Hollenweger, 2010).

There have been significant increases in the levels and types of services provided by community social service organisations. Many civil societies are oriented to the provision of community based social services. They serve to complement and broaden the services provided by publicly funded agencies (Cook & Vinogradova, 2006; Kulmala, 2008). These non-governmental organisations (NGO) and related non-profit organisations (NPO) comprise a major segment of the service spectrum in many geographic areas. They frequently function with eligibility criteria which are different from those effective for the agencies within the public bureaucracy. However, when the NGO or NPO accepts public funds as part of their operating budgets, the eligibility criteria of the funding agency are usually in effect for the particular programme or service.

The development of private sector social services has been prominent in recent decades. Services to children, disabled and elderly persons have been commonly the initial primary target priorities, e.g. in Russia. Some of the private sector service entities are for profit organizations (FPO). Contracting (out-sourcing) of public funds to FPO by the administering public agency has become a more common practice. Direct purchase of care or services by persons or families able to pay has rapidly increased. On this basis, the ability to pay is the primary eligibility requirement.

Social and economic forces have led to altered functions and practices among traditional concepts of state (government) roles in service programme design, development and operations. Models for generating and managing fiscal resources are in flux. Policy development practices and decision authorities have been modified. Standards for assessment of fiscal and program effectiveness have also been subject to changes. A major result of this process of flux and re-definition of roles and relations has been a greater priority for increased involvement of civil society and an emerging role in areas of corporate social responsibility (Sivakumar, Li & Dong, 2014). Concepts of eligibility must be re-defined within this context; and with differing concepts of eligibility.

The relationships between corporate social responsibility and private sector involvement in the provision of social services are of significant concern to many social
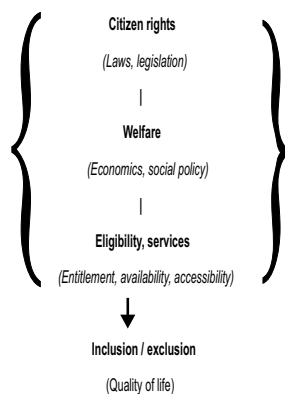
Figure 1   The interrelation of the basic conceptual framework

planners. These tensions are also reflected in the perceived consequences of cost-based program planning models focused solely on cost-benefit indexes. Some theorists view this model as synonymous with the neoliberal approach to service development. It has been suggested that the neoliberal approach negates the essential philosophical base for value based planning referenced to individual service needs. It is feared that too many administrators will "know the cost of everything and the value of nothing".

As noted above, social inclusion/exclusion processes are unique to each country and depend on many factors, including the philosophical bases for eligibility. Social inclusion is the processes of involvement and participation of individuals and groups in society. Both rights and responsibilities must be recognized. The processes are intended to improve individual capacity, increase in life opportunities, and engender respect for the dignity of people who are disadvantaged on the basis of their ability to take part in society. Whether the individual will be included / excluded depends on their rights as citizens, societal commitment to respect diversity, economic factors and ultimately eligibility for, availability of and accessibility to supports and services. Based on the above, a schematic of the interrelationships of the discussed basic concepts was developed (figure 1).

The decisions regarding social policy and service development reflect the moral and ethical values as well as the political priorities of the society in which they are made. These decisions essentially define the relationships of society to the individual and state to its citizens. It is recognized that value based, person referenced planning models, focused on the human impact of the life supports to vulnerable persons, have limited congruency with solely cost-benefit approaches and planning goals. To illustrate, a citizen rights based approach assumes a relationship between the state (society) and the individual not found in an approach which suggests that the individual has no basic right to services (constitutionally defined or otherwise) and the index should be whether or not the potential return to society warrants the investment in the individual. This implies a capitalistic "profit only" concept of social services.

There may be general agreement regarding the goals for services and life opportunities for vulnerable people while having major differences in ideology and approaches regarding the appropriate means to achieve those goals. The neo-liberal model for social policy development is based largely on a free market approach wherein services provided substantially or entirely by the private sector. This alters the historical social contract between the state, society and its citizens. The recognition of basic citizens' rights or entitlements within the processes of privatization is a fundamental concern. The redefinition of service eligibility standards and procedures is a direct corollary to the core concerns for individual rights and societal obligations.

Representative national social and economic characteristics

The following data summaries indicate select national social and economic characteristics which may be considered in relation to policy development and social services planning. Since social policies are developed within the context of these more general socio-economic conditions and processes, they should be considered in developing an understanding of factors affecting decisions regarding social priorities and commitment of public funds. It has been noted that identification of national priorities is simple — find where they put their money. These data illustrate the range of general societal priorities, processes and conditions which affect the development of social policies: Gini index (figure 2), human development index (table 1), gross domestic product (table 2), public spending (table 3), and indicators to education (table 4).

The Gini index (viewed as a measure of inequality) applied to the participating countries shows that South Africa has the highest level of this index. Finland has the lowest index. Further, the deciles index (differentiation) in Finland is the lowest among all project countries. This indicates that this country has the highest level of eligibility for citizen well-being among the countries considered.

The integrative representation of differences in well-being is indicated by data from the human development index (HDI); which gives a combined index of interaction between wellbeing, health and education (table 1).

Again, Finland leads (closely clustered with Italy and UK) with South Africa and India at the other extreme. Russia appears to be in the median range.

Other indicators which may relate to levels of human services availability include:

— Gross domestic product (GDP) per capita and level of poverty in the country.
— Public expenditures on social services, health and education (and military).
— Populations with secondary education and mean years of schooling.
— Number of social organizations and professionals per population.

India has the lowest rate of GDP per capita and the second from the highest ratio to poverty. Even though South Africa has more than four times bigger GDP per capita

Figure 2   Gini index in the project countries

World Bank (2013).

Table 1   Rank of human development index of the project countries

Countries	Rank
Finland	21
Italy	25
the UK	26
Russia	55
South Africa	121
India	136

UN, *Human Development Report* (2013).

Table 2   Gross domestic product and national poverty line in the project countries

	Finland	India	Italy	Russia	South Africa	The UK
GDP 2013 (billions U.S. $)	256.922	1,870.65	2,071.96	2,118.01	350.779	2,535.76
GDP per capita 2013 (U.S. $)	47,129.30	1,504.54	34,714.70	14,818.64	6,620.72	39,567.41
Poverty headcount ratio at national poverty line (% of population)	–	21.9 (2012)	19.6 (2011)	11.0 (2012)	31.3 (2009)	14 (2006)

IMF — The International Monetary Fund (2013).

Table 3   Public spending in the project countries

(% GDP)	Finland	India	Italy	Russia	South Africa	the UK
Government expenditure on social protection	23.8 (2011)	1.5 (2010)	20.5 (2011)	13.32 (2010)	5.05 (2010)	17.6 (2011)
Public spending on health	6.7 (2010, UN) 7.9 (2011, OECD)	1.2 (2010, UN)	7.4 (2010, UN) 7.4 (2011, OECD)	3.2 (2010, UN)	3.9 (2010, UN)	8.1 (2010, UN) 7.9 (2011, OECD)
Public spending on education	6.8 (2010, UN) 6.4 (2011, OECD)	3.1 (2010, UN)	4.7 (2010, UN) 4.2 (2011, OECD)	4.1 (2010, UN)	6.0 (2010, UN)	5.6 (2010, UN) 6.4 (2011, OECD)
Public spending on military	1.4 (2010, UN) 1.5 (2011, OECD)	2.3 (2010, UN)	1.7 (2010, UN) 1.5 (2011, OECD)	3.9 (2010, UN) 4.4 (2012, SIPRI)	1.3 (2010, UN)	2.6 (2010, UN) 2.5 (2011, OECD)

Human Development Report — Expenditure on Education, Public (2014).

it still has the highest ratio of poverty. There is no information about poverty ratio in Finland; these data are not available in checked sources. The percentage of GDP spending on social protection and education is the highest in the UK among participating countries. It is noted that the national line(s) of poverty depends on the "market basket" in each country and may provide an unstable base for general inter-country comparisons.

Russia holds the middle position in public spending on social protection, health and education; between EU countries and South Africa. While India (whose governmental expenditure is the lowest in these areas) has a higher percentage of spending on the military. This military expenditure for India is higher than its health spending and almost the same as the educational expenditure. The quality and access to education can be demonstrated by the correlation between public spending on education and mean years of schooling and educated general population. Finland illustrates this relationship. At the same time broad access to education in Russia (that is demonstrated by longest period of mean years of schooling and high percentage of educated population) and relatively low level of governmental expenditure can put in doubt the quality of education in terms of infrastructure and governmental compensation to teachers.

Public policies regarding the rights and protections for vulnerable citizens and the commitment of resources to support services to them are embedded in the more general socio-economic and political processes for the respective countries. These data illustrate the more general socio-economic characteristics of the countries included in the review of social services and the status of eligibility issues.

Table 4   Indicators of quality and access to education in the project countries

	Finland		India		Italy		Russia		South Africa		UK	
Public spending on education (rank)	1		6		4		5		3		2	
Mean years of schooling (2010)	10,3		4,4		10,1		11,7		8,5		9,4	
Population with at least secondary education (% ages 25 and older 2006-2010) F/M	100	100	26.6	50.4	68.0	78.1	93.5	96.2	68.9	72.2	99.6	99.8

Human Development Report — Expenditure on Education, Public (2014).

Implications for social work within the policy, management and direct services framework

Consideration of the functional relationships among policy development, management and evaluation, and direct services suggests the basis for conceptualizing three levels of role(s) and function(s) for social work professionals: (1) provision of direct services, supports and interventions to vulnerable persons; (2) programme and fiscal management and evaluation; and (3) leadership in affecting social policy development and comprehensive planning. The definition of the roles and functions among the areas of social work professionals is particularly critical for the direct service staff. It is this level of staffing which determines the quality and effectiveness of the total social service system. It is determined by the provision of specific services to specific individuals or families by specific direct service staff. This staff must be supported by administrative functions which respect their critical role(s) and provide for caseloads which permit real professional responses to service needs.

It is evident that differential competencies are appropriate and required for each level or area of function. Effectiveness in direct service provision does not necessarily correlate with effectiveness in administrative areas. Further, effective professional management skills are not necessarily effective in the political and legal arenas where basic social policy is formulated, enacted and tested. It is a truism that many effective administrators, left to their devices, will have little or nothing to manage. It is suggested that programme development relates to leadership, rather than management.

Since relatively few professional or advocacy groups have the services of full-time salaried lobbyists or advocates, the reality is that these leadership functions must be accomplished by persons whose primary responsibilities are in direct service and management areas. Social work professionals should recognize that their efforts in advocacy or leadership areas may be viewed by many legislators as the self-serving actions of vested interest people who are only "feathering their own nest", i.e. their primary goal is to amplify and expand their own roles and importance rather than improving needed services to real people. These point to the need

for social work professionals to coordinate their efforts with other professional and lay organisations and constituencies. Many times the stakeholders (service recipients) and figures in other public arenas are far more effective advocates than professionals.

Further, many professionals have difficulty accepting roles in political areas. They frequently do not understand or respect the political processes and cultures at national, state or local levels. They may, in fact, consider politics as a somehow "dirty" business in which they want no part. Further, they may forget that their professional language is frequently neither understood by, or persuasive with the public or legislative figures. Since the definition of social policy via statutory enactments is essentially a political process it involves "politics". Lobbying is the term commonly applied to efforts to affect decisions regarding politically based priorities and funding. Social activism or advocacy is, in reality, a form of lobbying; an effort to have maximum impact on decisions regarding the recognition of the rights and needs of vulnerable persons and the allocation of public funds to support service initiatives. Given the multiplicity of competing priorities, issues and needs common to all legislative processes, effective lobbying for social services is not only appropriate, it is essential. Social workers should become effective in providing expert testimony in both legislative (statutory law) and judicial/legal (case law) arenas.

As advocates and stakeholders learn to use the courts to protect rights; particularly in areas such as class issue actions, the role of professionals must be redefined. Getting on the agendas of public hearings is a common point of access to the legislative process; with opportunity for a brief (3-5 minutes) presentation, and leaving a full statement for later legislative staff review. Effective participation, e.g. affecting legislative committee decisions, requires a clear understanding of the processes involved and the nature and type of information to be provided in either oral or written form. Similar contingencies apply to the functions of providing expert testimony in court procedures.

Expertise in the use of mass media (radio, television, newspapers) is important for the implementation of public education and awareness programmes. The developments in information technologies and dissemination systems over the past four decades have provided the base for immediate and direct communication with major segments of the population on a scale heretofore impossible. The development of the myriad applications accessed through the World Wide Web and Google search platforms illustrate these developments. The functions of social networking are an important facet of the information dissemination and access networks. Social workers should understand the potential and applications of these technologies and processing systems.

Given that there is merit to these conceptualizations of differential levels of functions and associated competencies for social work professionals, implications for the design and development of social work training programs appear obvious. A comprehensive training programme may commit to providing all three levels or areas of preparation; from a core body of knowledge basic to all. These considerations also relate to issues of programme accreditation, licensure and certification, and differential academic degree programs.

At the more operational level, training programs may consider such options as the development of field placements, practice or internships in the offices of elected representatives at national, regional, or local levels. Similar training options in the executive and judicial areas should be considered. Being involved in and contributing to the background research and drafting of proposed legislation is an excellent vehicle for social workers to empower themselves to influence policy development. Such involvement provides the basis for understanding the basic political processes; identifies the respective decision points or bodies; identifies the schedules of meetings and hearings (points of access) which permit input and testimony; and facilitates the development of organisational advocacy.

Given the mix of agencies and disciplines comprising the social services network, competencies in development of inter-agency (among agencies and organisations) and inter-disciplinary (among professional disciplines within agencies) relationships and processes appear essential for both administrative and direct service personnel; with differential applications of basic competence. Nurturing of joint planning and service activities would benefit from competence in cooperative communication processes, mediation and decision making. A challenge for social workers will be to demonstrate disciplinary competence in an inter-agency and inter-disciplinary environment involving collaborative coalition building processes.

Summary and conclusions

Changes in global and national socio-political and economic conditions in recent decades have markedly affected social policy development and planning of social services. Budgetary considerations and constraints have become a more urgent concern and have made the allocation of public funds for social services much more competitive. These changes in the general socio-economic-political areas have affected social policy priorities; altered the historical relationships between states and their citizens, e.g. Russia; influenced service philosophies and goals, motivated re-examination of the concepts of eligibility and entitlement; increased the impetus for private sector involvement in social services; and led to re-configured fiscal support mechanisms. An awareness and understanding of the nature and effects of these complex inter-relationships at national and international levels is essential to furthering collaborative international research and development efforts.

Advocates and social activists must have a functional understanding of the basic processes underlying social policy development, programme authorizations, and fiscal appropriations. In nations with representative governance structures, these basic processes involve executive, legislative and judicial/legal spheres of influence and control.

Service eligibility is confirmed as a key element in the planning and development of social services. Both the philosophical base, and operational programme consequences are crucial in the service design and delivery process. It is proposed that a critical underpinning of service eligibility lies in the arena of general human

and civil rights. Therefore, its impact as a keystone of services to vulnerable persons is pervasive.

The results of this preliminary investigation of eligibility concepts within the general framework of variables affecting social policy illustrates the critical roles of the functional spheres of influence and contribution (executive, legislative and judicial/legal) has in the service development processes. Their combined effects determine the availability, accessibility, appropriateness of the service and opportunities afforded to vulnerable persons.

As these forces have shaped the social services environment they have also given impetus to re-defining the roles and functions of the social work profession. There is an old adage in business: "You can't do 'todays' business with 'yesterdays' methods and be in business tomorrow". The social work discipline must demonstrate a real relevance to todays and tomorrows conditions, issues and opportunities if they are to continue to be significant contributors to determining the future of social services. The maxim from futures planning that "you can predict the future… if you help determine it" appears relevant. The design and development of programmes training professional social workers should reflect the informational and performance competencies needed to function effectively in areas of direct service, management and evaluation, and leadership in social policy development and comprehensive service planning. In the area of advocacy (lobbying) to affect social policy processes, the development of operational guidelines or "how to" manuals for use in pre-service training and in-service professional development would materially facilitate these efforts.

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