

A REVIEW OF SOCIAL WELFARE AGENCIES

A Study of the Annual Review Procedure
practised by the Portland Council of
Social Agencies

by

ANDREW ERNEST THOMPSON

Thesis Submitted in Partial Fulfilment
of the Requirements for the Degree of
MASTER OF SOCIAL WORK
in the Department of Social Work

1950

The University of British Columbia

A Review of Social Welfare Agencies

A Study of the Annual Review Procedure practised by the Portland Council of Social Agencies

This study deals with the annual review procedure of the services comprising the Portland Council of Social Agencies. An effective method of appraisal of the community social welfare services is an obvious necessity of a central planning body. Background information was obtained during a six month student placement with the above agency, through discussions with Council staff, and through participation on two review committees. Findings were also based on study of annual reports and minutes of committee meetings of the Council.

The thesis begins with a brief history of the federated planning movement in social welfare, and then describes the structure and function of a Council of Social Agencies. Attention is given to the development of the Portland Council, and the role of the review committee is shown in relation to the other functions of that Council. Discussion is made of the initial practice and the development of the review committee.

The review committee procedure is discussed in detail. Recruitment of members and their orientation to the review role is considered. The function of the council secretary in preparing for the meeting with the agency is shown. Emphasis is stressed on the participation by the agency in submitting material to be studied.

The development of the review report from the meeting of the committee with the agency is described. The techniques of formulating the recommendations and the various problems encountered are presented.

The educational influence of the review procedure is explained. Examples of the consideration of agencies to review recommendations are given. The emphasis on the effectiveness of cooperative review by committee and agency concludes the thesis.

ACKNOWLEDGEMENTS

I wish to acknowledge with gratitude the patient and kind assistance of the staff of the Portland Community Chest and Council. I am particularly indebted to the constant cooperation of the divisional secretaries.

Special acknowledgement is made of the persistent encouragement of Mr. John Whitelaw, executive secretary of the Portland Council, who gave generously of his time and professional advice during the preparation of this study.

The writer wishes to acknowledge also the keen interest and helpful counsel of Dr. L.C. Marsh, of the Department of Social Work, University of British Columbia.

TABLE OF CONTENTS

Part I. The Background of Review Committees

Chapter I. Development of Councils of Social Agencies

Brief history of federated planning movement. The structure of Councils. The function of Councils. Connection with review committee.

Chapter 2. Portland Council of Social Agencies

Description of Portland. Initial central planning body. Organization of the Council of Social Agencies. Function of the divisions.

Chapter 3. The Initial Practice of the Review Committee

One person visits. Groupings of Agencies. Brevity of reports. Results achieved. Recommendations stressed.

Part II. The Review Committee Today

Chapter 4. Preparation for Formation of Review Committee

Trend towards cooperative review. Grouping of agencies. Composition of committee membership. Recruitment procedure. Initiation of members.

Chapter 5. Preparation for Review Meeting with Agency

The Agency's role. Self evaluation in composing report. The Committee's role. Preparation of questions.

Chapter 6. The Review Meeting with Agency

The procedure of the meeting. Flexibility of procedure. Staff member's role in meeting. Insurance of attendance.

Chapter 7. The Report.

Passage of tentative report. Flexibility of passage. General recommendations. The intensity of review. Influences of review committee. Individualized approach to recommendations.

Part III. The Results of Review Committees

Chapter 8. The Effectiveness of Review Committees

The educational influence. The scope of review.
Examples of effective recommendations. The cooperative
attitude of agencies.

Appendices:

- A. Sample of Review Committee Report.
- B. Sample of Review Committee General Recommendations.
- C. Member Agencies of the Council of Social Agencies.
- D. Organization of Portland Council of Social Agencies.
- E. Organization of Portland Community Chest.
- F. Number of recommendations between 1945-1949.
- G. Bibliography

CHART IN THE TEXT

Fig. 1 Organizations of Chest and Council

Page 7

A REVIEW OF SOCIAL WELFARE AGENCIES

Chapter I

The Development of Councils of Social Agencies

During the latter half of the nineteenth century on the North American continent, growing public enlightenment concerning the many social welfare problems produced a rapid development of voluntarily financed agencies. Special groups and individuals becoming interested in specific welfare problems created agencies which they hoped would cope with these situations. There was no integrated plan into which these developments fitted. Sooner or later the need for a central planning body became obvious if an orderly development of agencies was to be possible. By such planning the greatest efficiency might be achieved in serving the welfare needs of the community.

By the beginning of the twentieth century several methods by which communities attempted to achieve cooperative welfare planning were discernible. Committees of representatives of agencies convened to plan action concerning specific problems. Charity organizations, small federations of agencies, and the Social Service Index - a central information bureau recording the names of clients served by agencies - were among the methods adopted. In 1910 in the cities of Milwaukee and Cincinnati the first Councils of Social Agencies in the United States were created. These councils were voluntary federations of representatives from the social welfare agencies and individuals in the communities. Their purpose was to promote joint planning in order that community effort might make optimum use of all the material and human resources available.

Collective planning and collective financing of services, of course, are closely connected. The necessity for a concerted system of gathering funds for the social welfare projects resulted in the "Community Chests", federations of agencies for the purpose of one overall fund-raising campaign. In many cities the development of Community Chests paralleled that of Councils of Social Agencies. In some cities the existence of a Community Chest resulted in the initiation of the planning body - the Council of Social Agencies - in order to assist in settling the Chest's budgetary responsibilities to the agencies. In other cities the Council of Social Agencies was established first, and it eventually initiated the Chest as a method for joint financing the plans of voluntary agencies.

Certain periods have given special stimulus to Council organization. During the year of 1914-18 "War Chests" were formed in several cities in order to consolidate the various independent campaigns to raise funds on behalf of the soldier. The success of federation having been proved during the war period, a special impetus was given to federated fund-raising and joint planning during the post-war period of the 1920's. Again, with the serious and widespread distress which swept this continent in the depression decade, there was desperate need for efficient coordinated planning and financing of social welfare services. The Community Chests and the Councils of Social Agencies again proved their value during this hard testing time. Most recently of all, stimulation was given to the federation movement for social welfare services during the war years

of 1939-45. Again "War Chests" were created, and federations such as the United Service Organization brought all voluntary welfare services on behalf of the soldier into one organization.

Today there are Community Chests and Councils of Social Agencies in approximately 350 cities in the United States, and 40 in Canada. They are now accepted as necessary media by which effective community welfare services can be carried out.

The Structure of the Council of Social Agencies

The Council of Social Agencies has been defined as a voluntary local federation of social welfare agencies and individuals. Merrill Krughoff has listed the following as the minimum essentials for a council of social agencies:-

"...incorporation, a constitution and by-laws; the usual officers; a basic membership body; a board of directors or executive committee; and a provision for the creation of divisions, departments, and committees to undertake specific projects."¹

The sections into which Councils of Social Agencies are divided are usually in broad recognized fields such as Family and Child Welfare, Recreation, and Health. Membership in these divisions is composed of agencies and individuals specifically interested in these respective fields. These divisions may be almost autonomous Councils of Social Agencies in themselves; however, they do connect with the overall community Council of Social Agencies in order to have a community central planning body. When specific problems for study overlap

¹ Krughoff, Merrill P., "Councils of Social Agencies", Social Work Year Book 1947.

into the areas of two or more divisions, committees directly responsible to the overall council board are formed. Depending on the size of the community and of the federation, Councils of Social Agencies have, as well as the divisions, separate departments such as Research, Publicity and Information. It is generally agreed that the basic membership should include representation from the staff and the board of the social welfare agencies composing the Council.

Provision should also be made to have outstanding public-minded citizens included as representatives-at-large. Their contribution in terms of prestige alone is of much value.

The Council of Social Agencies should give opportunity for the sharing of different viewpoints in the community. A truly representative Council is a great asset in planning for acceptance to the planning comes through active representation.

Examples of those organizations which have the expressed objective of the social welfare of the community have been listed as including:-

"the medical and dental societies, the schools, the police departments and the Junior Leagues,... nationality, business, labor, religious, patriotic, parent-teacher and other groups."

Each city has a different composition of membership depending on the background of the community.

Some Councils of Social Agencies require a certain standard to be met by an agency seeking membership. They claim this policy encourages the agencies to aim towards the entrance requirements. Further, they maintain that if they did

not demand standards for admission, their Councils would be implying approval of poor conditions in the agencies.

However the majority of Councils of Social Agencies maintain an open-door policy permitting all social welfare agencies to belong to their federation. These Councils maintain that it is only through close association all agencies will be educated to aim towards higher standards of service.

Councils of Social Agencies should and usually do include both local chapters of national organizations and governmental welfare agencies. Not only do the Councils thus achieve a more comprehensive community picture, but also they are the media by which those agencies understand the complete community aspect to their specific function. With respect to the governmental agencies, the Council is often a medium through which these agencies can interpret their function, can learn of their relationships with voluntary financed agencies, and can hear the private citizen's criticism or approval of their policies.

Through studying the variations in structure of an organization the limitations to its functions may be understood. It is obvious that the difference in admission requirements to Councils of Social Agencies will determine the comprehension of their representation in the community. Representation, as indicated above, will often control effective functioning.

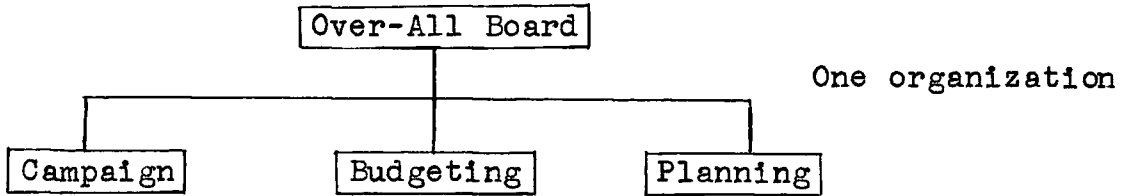
A structural factor which has been the subject of much consideration is whether Councils of Social Agencies should be amalgamated with Community Chests or not. The primary function

of a Community Chest is to raise and allocate the money required to meet the budgetary deficit of the member agencies. The primary function of a Council of Social Agencies is to plan services to cover adequately the community's welfare needs. It has been argued that by amalgamation, Council and Chest can achieve a better understanding of their respective functions. Again, there may be less cost in the administration of the two organizations, as clerical staff and departments such as research and publicity can be used by both. On the other hand, close association between planning and financing departments can result in the planning being curtailed by the financial interests. Councils of Social Agencies have been throttled by the purse strings of Chests to which they are bound.

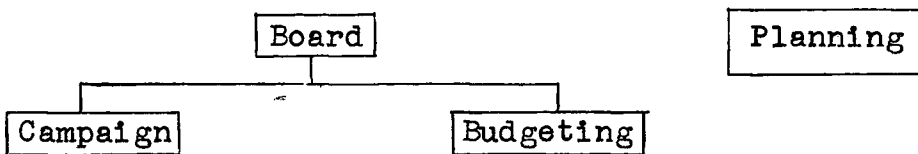
Three main ways in which the Chest and Council can be organized and related are shown in Chart I . A Council of Social Agencies separate from the Chest can be regarded by other community agencies as a central independent planning body. Agencies not financed by the Chest, whose delegation is necessary to give an adequate comprehensive community representation, may be more enthusiastic about joining an independent Council of Social Agencies. It is not necessary to decide such an issue in the present study although the real test as to whether Council and Chest should be amalgamated or not may depend on the conditions in each local situation and the relationship between the executives of the two organizations.

Chart I

1. Community Chest or Council of Social Agencies

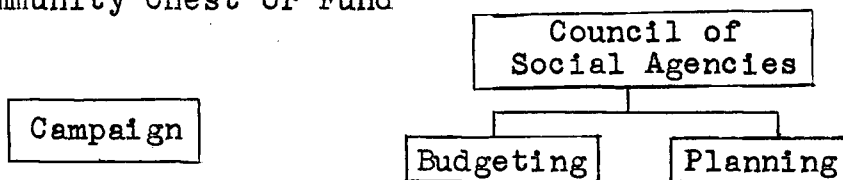


2. Community Chest or Fund Council



Two organizations

3. Community Chest or Fund



Two organizations

The Function of a Council of Social Agencies

It is the objective of a Council of Social Agencies to promote joint planning in order that the community effort may make optimum use of all the material and human resources available.

This objective may be achieved through the following functions:-

1. Fact finding
2. Coordinating activities
3. Joint action
4. Improving standards of services
5. Functioning common services that every agency needs
6. Public understanding

Facts are needed to develop sound planning; sound planning is needed to develop coordinated action; public understanding is needed in a democratic society for action to be effective. It is therefore obvious that the above functions are all inter-related, and the work of one aspect will commence activity by the others if effective results in the community are to be achieved. But it is also obvious that the other functions cannot proceed efficiently unless that of fact-finding is first carried out conscientiously and intelligently. The collection and analysis of data about the community's welfare problems provide the fuel from which the Council of Social Agencies can generate its power.

The data should include the extent of the social welfare problems in the community. These problems have been categorized by some writers into four main groups:-

- (1) Dependency. This category would include those people who due to lack of money require services in the way of food, clothing and shelter.
- (2) Behaviour and Social Problems. This covers many fields: child neglect, illegitimacy, divorce, mental disease and mental deficiency.
- (3) Health. This group includes those who have communicable disease, and would cover the necessary preventive measures as in water and milk inspections.
- (4) Recreation. This includes the need of the community to have the opportunity to make use of its leisure time. This need would include the physical facilities such as parks, swimming pools, club corners, organized programs such as athletics and dances, leadership and supervision of individual participation in group activity.

The Council of Social Agencies will not only require data concerning the extent of social welfare problems but will also wish to have information on the volume and adequacy of social services relevant to these welfare needs.

The basic community services considered necessary in a community have been summarized under the following twelve groupings:-

- (1) Educational facilities of standard quality for children and adults, organized in accordance with individual needs, interests and capacities, and closely related to the economic and social life of the community.
- (2) Family counselling and adjustment services, and provision for insuring the economic security of the family.
- (3) Services and care for children in their own homes, and provisions whereby substitute homes or institution care may be provided when necessary.
- (4) Mental hygiene clinics for adults and children.
- (5) Adequate children's court and detention facilities.
- (6) Provisions for the care of children of working mothers and adequate standards in child labour laws and full enforcement of such laws.
- (7) Recreation facilities and leadership for children, youth and adults.
- (8) Vocational guidance service for youth and adults.
- (9) Employment services for youth and adults.
- (10) Provisions for adequate care, adjustment and recreation for the aged.
- (11) A community health program designed to provide both preventive care and treatment for adults and children of all ages and economic status, including hospitals and outpatient clinics.
- (12) Adequate and well-trained personnel in education, health, welfare and recreation.²

2 Community Chest and Council Federated, Let's Make a Study, No. 1 Bulletin 114-A, p. 2

Various approaches are used by Councils of Social Agencies to gain the knowledge required on the welfare needs and services. A study may be focused on a specific aspect within one of the four categories of welfare needs. Again, a study may cover the total community welfare services and their adequacy in meeting the community needs. This total survey has been recommended to be carried out every five years in order that a general community social welfare stock-taking make take place, and from the findings sound planning made for the intervening years. Professional experts in social welfare may be employed alone to make a study. If they come from another locality they tend to have a more objective outlook and again, because they are recognized as experts, their findings have the backing of their professional status. However, the out-of-town expert has the disadvantage of not knowing the local community situation, and with limited time he is forced to derive this information second-hand. Further his recommendations may be ideal for most situations but not the complexity of the present circumstances. Sometimes by understanding the expert's philosophy and reading the recommendations of previous surveys he has made, his analysis of a local situation can be grasped without the expense of his presence.

It is an accepted principle of social case work that the worker should help the client to gain insight into his own personality, and this can be carried over into the field of community organization. Studies carried out by experts should involve the cooperative function of community members in order that they themselves can gain insight into the structure of their

community. The experts can make the most farsighted recommendations, but until these are accepted by the citizens of the community, they are as dreams. Therefore the experts should use their special abilities to give direction to the community; but it is through participation in formulating these directions that acceptance results. The method of review committees composed of citizens-at-large and professional social workers is therefore used for both specific and general study of the community.

The Review Committee and the Council of Social Agencies

It has been explained that a Council of Social Agencies requires constant intelligent analysis of data about the community's welfare problems in order to function efficiently. The effectiveness of services is obviously included in the required data. Constant appraisal of these services is therefore necessary.

Councils of Social Agencies have therefore been using the various methods of survey in order to make this appraisal. The advantages of the method of the review committee is that the membership is composed of representatives from the community. The expense of the outside expert is avoided, and review can also take place annually. Through continuous review by community people, there is greater opportunity for the acceptance and for the implementing of the recommendations.

Although it is an obvious and vital function of the central planning body of a community to assess its services, there has been little study made of the various methods of assessment. The Council of Social Agencies of Portland, Oregon, has established the review committee during the past five years. It is the purpose of this study to analyse this method of evaluating the community welfare services.

Chapter II

Social Welfare Planning in Portland

Portland was established as a boat landing for traffic on the Willamette River in 1844; it received its charter in 1851, but remained a village community until 1890. The removal of the sand bar at the mouth of the Columbia River and the dredging of the Willamette channel opened the port to ocean vessels and the world trade. The building of three major railroads stemming out from the north, east and south of the city hurried its development as a market centre for a considerable trade area. The 1848 "gold rush" and later (1897) the Klondike gold rush developed the port as the source through which supplies were shipped to the stampede areas. Shipping companies, mills, granaries, factories and stores mushroomed and it was not long before most of the immigrants drifting into Oregon did not come to homestead but to answer the new labor demand.

By 1905 the population was 90,000 and in the succeeding years there was a continued increase. During the recent war a new impetus to growth was especially emphasized as the shipbuilding and wartime industries demanded influx of workers. Portland's population rose from 305,400 in 1940 to 359,000 by 1944, and by 1949 Greater Portland included 535,000.

Industries exported raw material and imported manufactured articles. The throbbing port and focal position for the surrounding areas, the nearby lush farm lands and the

wealth of the nearby forests produced standards of living higher than the national average. The development of local industries of diversified character should increase with the low rates of electricity produced at Oregon's Bonneville and Grand Coulee dams.

Most of the population are from northern European stock and are adaptable to the coastal environment. Although there have been plenty of poor people from the initiation of the growing city, there has never been any serious slum area. The city has expanded along the river's banks sweeping out into the surrounding hills. In the early days of the city's development, the poorer inhabitants lived in cheap houses with vegetable gardens and cows in their backyards. The necessities of life were low in price though luxuries, due to transportation costs, were expensive. However, relatively few people really suffered for wages were steady and labor continually in demand. The city has never fully assumed responsibility for the discharged men from the seasonal basic industries, considering that the annual unemployment situation can be absorbed by these diversified local industries, or taken care by the private financial agencies.

Pioneer Social Work

In 1931 the Citizens' Social Work Survey of Portland social agencies wrote:

"Psychologically Portland's citizens still reflect the New England pioneer in the west. No one denies a flavor of conservatism which makes itself felt in subtle ways. On the other hand, the hearty spirit of the pioneers is still alive. Relief giving in Portland is in the tradition of the open cabin door."

During the 1840's when the immigrant wagons pulled through the rugged mountain trails and down to the rich valley lands of Oregon, citizens already settled would meet the new arrivals and give them a helping hand. The pioneers were religious, and this was the practical application of their church doctrine. A small group of women continued to aid the new immigrant and to care for any destitute family by soliciting food and clothing from the stores. As the city grew this "Ladies' Relief Committee" developed into an organization with representatives from all the churches. A systematic arrangement was developed to help the destitute by delegating the responsibility to sub-groups in each district. However, the many churches in Portland still continued their own individual relief committees and this was supplemented by the charity of individual citizens.

The "Ladies' Relief Committee" through their direct contact with problems were able to interpret the need for various welfare agencies to financially responsible groups. As a result such institutions as the Reform School for Boys in 1872 and the Boys and Girls Aid Society in 1885 were formed.

In a growing city with its conglomeration of population community welfare problems will inevitably result. The two decades before the turn of the century saw relief agencies developing hastily to service the broadening welfare problems. Many of these relief agencies confined themselves to aiding the members of their own religious faith and nationality.

Again, during this period public financed agencies such as the state institutions for the feeble-minded, for the insane, for the blind and for the deaf were also established. Several institutions for children sponsored by both public and private auspices were also formed.

"Agencies and institutions multiplied with very little relation to each other, especially in the administration of relief and the care of children. Duplication of effort and widespread pauperization resulted and stimulated the charity organization society movement which had for its purpose the analysis of the causes of misery and the organization of community effort for remedial measures."¹

The development of a Central Planning Body

A welfare committee of the First Congregational Church convened in 1899 to formulate a Portland Charity Board. However, although started by a church group, this had been from the first non-sectarian as well as non-political. Its main purpose was not to give direct relief to applicants but to be a clearing house by which to avoid recipients being serviced by more than one of the more than seventy charity organizations then in the city.

The objectives came to include:-

"The purpose of bringing cooperation of agencies to lessen duplication of relief, to aid in any possible social reform movements, to repress mendicancy, to suppress vagrancy, to investigate all cases referred to them from any source and to publish facts about imposters."²

1 Feary, A., "Origins of Family Social Work in Portland, Oregon", The Social Welfare Reporter, May 1941, The Portland District Oregon State Conference of Social Work.

2 Ibid.

These above objectives would indicate that the Board would function as a paternalistic policeman investigating the social welfare agencies.

The membership included the high officials in city government - the mayor, the chief of police, also charter members, annual members subscribing not less than six dollars and life members subscribing not less than one hundred dollars. However to develop better cooperation a survey committee was formed of representatives of the agencies in 1890.

Although the Board of Charities was principally a clearing house on the names of clients who came to the agencies for relief, it did also become a focal point for the discussion of social welfare problems as free medical care, wife desertion, juvenile probation etc.

As a result of these discussions further agencies were formed. Thus the Visiting Nurses Association, Legal Aid Society and Prisoners Aid Society were initiated.

The Board of Charities was not an integrated organization with various divisions in which specific welfare problems were considered. It was, as before stated, mainly a clearing house but this function itself was not clearly established among the agencies. At first the society received a full case history on the applicants to the agencies. In 1905 the Board employed an office registrar and had a card system of records, which was not widely used. Therefore the secretary of the Associated Charities (the new name given the Board of Charities in 1906) considered the organization should develop more broadly and

take more active responsibility. In 1909 he stated,

"The greatest need of the Charities at this time are: a Registration Bureau, better cooperation between charity organizations, larger paid staff, regular monthly meetings of workers for discussion of cases and methods, and cooperation with coast cities for action against vagrancy."³

The secretary was not satisfied with the loose organization of the Associated Charities to achieve the above objectives.

Through such men as he, holding to a set aim, this Associated Charity organization was to be the basis from which welfare organizations including the Council of Social Agencies were to branch.

By 1911 the Associated Charities was being systemized under departments. The divisions included the Rehabilitation of Families, Xmas Relief Fund, Fresh Air Committee for sending needy mothers and children to summer camp, and a Case Committee. The Case Committee was composed of Portland women who met every two weeks to discuss specific problems of individual families and to train friendly visitors in practical methods of helping the needy. The divisions increased and gradually separated from the central organization.

In 1916, because of the unpleasant connotation of "charity", the organization decided to change its name. As it primarily dealt with family relief in the community the name was changed to the Public Welfare Bureau.

3 Tynan M.A. and Walker Elsie H., "The Social Workers Club of Portland", The Social Welfare Reporter, April 1947, Portland District Oregon State Conference of Social Work.

A central confidential exchange by which to check duplication of applicants had been recommended by a Board of Commerce survey in 1915. As previously stated the function of the first Board of Charities had been that of central clearing, but there had not been full participation by agencies in the initial set-up. The Board of Commerce recommendation in 1917 resulted in a committee being formed from a representative group of Portland social workers and in 1920 a social service exchange was formed with a full-time secretary.

As far back as 1890 the Board of Charities had seen the advantage of developing cooperation amongst the agencies by having representatives meet in a survey committee. During the ensuing years the social workers themselves took the initiative in convening together.

In 1914 the Social Workers Club of Portland was organized consisting of forty-five persons representing twenty-seven social welfare organizations. The group convened monthly for dinner, usually with a speaker on some social welfare subject. Committees were formed to study pertinent local problems, such as the "dance hall problem" and motion picture censorship, and resolutions from these groups were sent to the state legislature. Further, this body of professional social workers was developing into the central planning group on the community's services to social welfare problems.

The beginning of Portland Community Chest

The purpose of the Community Chest was to develop annually a single federated fund drive. From the history of Portland's social welfare services it can be seen that many voluntary-sponsored agencies had developed throughout the city. Each of these social welfare agencies depended on its own fund campaign.

During World War I the Portland community was insistently besieged by appeals for charity causes and war relief. The welfare agencies would campaign at their own pleasure and direction as often as once every week. Professional promoters conducted campaigns for agencies at a cost of as much as 35 per cent of the money collected. Faced with this chaotic situation, a group of civic minded citizens determined to rectify it.

In March 1920 an organizational meeting was held on the basis of which, after further deliberation, the official incorporation of the Chest was executed on September 20, 1920. "Thirty-one local agencies and six committees representing national or foreign relief projects were participants in the 1921 Chest funds. The average fund raised for local agencies during the first three years the Portland Community Chest was in operation (1921, 1922, 1923) was \$470,756."⁴

There were other indications that the Social Workers Club was developing the function of a central planning organization for the social welfare agencies. A club committee had been

⁴ Twentieth Anniversary Annual Report, Portland Community Chest 1939, p. 6.

formed on the need for a "Central Council of Social Agencies," and in 1921 this was organized. This Council was specifically for the purpose of representatives of the various agencies co-ordinating through discussion and planning their services to be more effective for the community welfare. It was instrumental in:-

"...endorsing legislative measures of worth, pledging cooperation in worthwhile recent developments such as a new Child Welfare Commission and the state campaign for public health, and not shrinking from controversial questions."⁵

The Chest, itself brought about through the principle of co-ordinated fund raising, recognized the importance of cooperative social welfare actions. The first agency that received Chest allocations was the Confidential Exchange, which thus became independent of the Public Welfare Bureau agency.

In 1923 the Board of the Chest, realizing the necessity for a joint planning body to aid in the allocation of funds to agencies, and also aware that the Chest to be an alive federation needed the cooperative participation of the member agencies, decided to finance an advisory body. The Portland Social Workers Club, with the committee on central planning, was a representative group of agency personnel already established and therefore the Chest gave an allocation to this group in order that it should act as the advisory organization.

5 Tynan & Walker, op. cit.

Thus the Portland Council of Social Agencies grew out of the Social Workers Club. It operated under temporary officers and committees until 1926 when a permanent organization was effected, with a full-time secretary. The organization in its first year included representation of a staff and a board member from twenty-eight welfare agencies.

The organization of the Council of Social Agencies.

It may be well, at the risk of redundancy, to emphasize that the functions of a Council of Social Agencies are those of fact finding, coordinating activities, joint action, improving services, common services and public understanding.

Within the first five years, 1926-31, under the energetic leadership of the executive secretary, the Council of Social Agencies had established well its role in the community. To have a sound understanding of her job, the secretary had visited six different cities and studied their central planning structures. During her first year she made "acquaintance visits" to fifty-four of the local welfare agencies, whether members of the Portland Council of Social Agencies or not. In these visits she interpreted the role of the Council to the agencies and also had the opportunity for a quick assessment of the community welfare services. An overall survey committee was formed in 1927 to formulate reports on various agencies in the Council of Social Agencies. These surveys encouraged the agencies to improve their standards.

Committees had been formed of representatives of agencies and citizens of the community, and included the

following:-

- Committee on agency problems
- Committee on outside contacts
- Nominating committee
- Committee on course for volunteers
- Committee on emergency relief
- Publicity committee
- Child caring group
- Family relief group
- Character building group

The secretary had laid the foundation by which the functions of fact finding, coordinating activities, joint action, common services and public interpretation could be developed. These committees were formed to coordinate action on the specific aspects in which their names implied they were interested. The last three groups named in the above list were composed of representatives from those agencies doing similar work as defined by their titles.

These groups originated in the Family Relief Group in 1927, the Child Caring Group in 1928 and the Character Building Group in 1929. They were the divisions in the Council of Social Agencies. Each division studied specific welfare problems of interest to its members - for example, the Character Building Group, made up of recreational agencies, had a study of the needs of camp-life for underprivileged children.

Concerning common services, the Council of Social Agencies maintained a close cooperative relationship with the Confidential Exchange, the central clearing house of applicants' names for the social welfare agencies. The office of the Council of Social Agencies in 1926 with the cooperation of the Confi-

dential Exchange and the Public Welfare Bureau - the largest family relief agency - developed an Xmas Giving program which arranged the distribution of gifts to hundreds of needy families without confusion, duplication or humiliation to the families. This joint action of the Xmas Giving program became the traditional responsibility of the Council of Social Agencies. A social workers' directory giving the names and description of community welfare services was published in 1927, 1928 and 1930 by the Council.

The publicity committee attempted to interpret to the public the work of the Council and the various agencies. The secretary wrote articles for the City Club Bulletin, in which in 1927 space had been bought by the Council of Social Agencies. However she herself despaired of the effect that was being made in public interpretation and recommended that a full-time publicity bureau be established.

During the five years of office (from 1926-31), the secretary had laid a sound foundation from which the central planning body could continually develop. The membership requirements of the Council had been formulated so that definite standards of organization were required by agencies applying, and the membership had increased from twenty-eight in 1926 to forty-two in 1931. However she considered that all these surveys and committees should have a sound basis from which they could judge the efficiency of the community social services in meeting the welfare needs. Therefore she constantly recommended in her annual reports that "a complete survey of Portland's social needs and agencies both public and private,

administering to those needs, is necessary before the individual surveys can be relied upon to give the proper valuation of the service of that agency to the community."⁶

In January of 1930, through her energetic persistence and that of a committee of the Council of Social Agencies, a group of thirty-five representative citizens was convened to discuss financial plans for a state-wide survey of the welfare services. From this meeting arrangements were made by the city, county, state governments and the Chest to grant appropriations for the survey. A committee with representatives from these bodies took charge of the preliminary planning. The secretary of the Council of Social Agencies en route to the National Conference of Social Workers in Boston was delegated to consult with social work authorities concerning competent personnel to carry out the project.

Three social welfare experts were engaged who organized a general committee of eighty-two citizens under the name of the Citizens' Social Work Survey Committee which elected a smaller executive committee of sixteen members. The three experts visited all the social welfare services in their specific fields. The survey covered fifty-nine agencies in which the Community Chest and the Council of Social Agencies were included. The reports of the experts were reviewed by the citizens' committee and 155 specific recommendations for changes in the social welfare program of the city and county were made.

6 Annual Report of the Portland Council of Social Agencies, 1928-32.

It is interesting to note that the 1939 Annual Report of the Community Chest stated that:-

"Facts developed and set forth in that survey have since proven of great value in reaching other important decisions not covered by the recommendations. A recent check reveals that 50 of these recommendations have been fully adopted or put into effect. An additional 36 have been partially adopted. 14 are, because of other changes in the situation, no longer applicable. This leaves 55 or but 35% of the recommendations unheeded.

The fact that 65% of the recommendations have been adopted together with other values found in the Survey report from time to time are not only evidence of the quality of the job done by the sponsoring citizens' committee but also the splendid responsiveness of Chest agencies to well-considered and competent counsel."

The survey recommended that the Community Chest and the Council of Social Agencies should be united in one federation because the planning body should have an official relationship to the finance function of the Community Chest. Therefore a committee was formed subsequent to the completion of the Survey which studied the method by which one federation of Chest and Council could best be organized, and on January 1, 1932 the offices of the Community Chest and the Council of Social Agencies were merged into one legal corporation. Appendix E clarifies the new organizational structure.

The Council of Social Agencies had the following duties, as stated in the by-laws of the Portland Community Chest:-

7 Twentieth Anniversary Annual Report of Portland Community Chest, 1939, p. 7.

"To promote the welfare of the community through such activities as the cooperative planning of social work, the promotion of social legislation, the creation of intelligent public opinion concerning social problems. It shall be prepared to make investigations and offer recommendations concerning questions referred to it by the board of directors, the executive committee, or the budget committee of this organization."

The services of the Council of Social Agencies since 1932 have steadily developed. (The organizational chart shown in Appendix D illustrates the Council of Social Agencies as it is in 1949.) Because of the federation of Chest and Council, departments could be formed which one of the organizations alone would have hardly warranted but which two could fully utilize. Again, as the Council function became ably handled by staff and was interpreted to the community, the horizons of its function increased proportionately.

The Social Service Exchange has been described in the very crude shape in which it originated in 1899 with the City Board of Charities. It was not changed much over a long period until in 1915 when a Board of Commerce survey recommended the establishment of an efficient central clearing house of applicants to social agencies, which was formed in 1920. In 1922 the Social Service Exchange became the first Chest supported agency.

Through this clearing house duplication of service to the client, duplication of expenditure and duplication of effort have been avoided. The Exchange has in its files approximately 500,000 cards - on which is factual information concerning the client and his family, which is vital to agencies.

Both public and private financed agencies are included in the Exchange, and standards of membership insures that information given out will be treated with professional discretion.

The Public Relations Department began with a committee which had been formed to interpret the work of the Council and the agencies to the public in 1927. However the secretary had constantly stressed that a full-time publicity bureau was necessary in order to give adequate interpretation, and with the amalgamation of the Chest and Council this was made possible. The principal role of this new committee was in interpreting the campaign to the community. In 1937 the campaign publicity committee consisted of Portland's leading advertising and radio men, and acted in the capacity of an advisory committee. A Chest agency publicity committee of representatives from Chest agencies was also organized in that year to develop a year-round publicity program.

The effect of publicity was of great importance to the success of the Chest and the agencies. It had developed along many lines with posters, newspaper stories, cartoons, magazine sections, speakers, public relations clinic, "Visit Your Agencies" campaign, radio programs etc. In 1939 to coordinate publicity and public relations a professional public relations counsel was retained on a part-time basis to advise agency executives and consult with public relations people (both volunteer and professional) in order to achieve better interpretation of Community Chest services throughout the entire year.

By 1947 a public relations department was established with a full-time director and an assistant. This department is constantly occupied in sending out day-to-day news of Chest, Council and agencies. The welfare needs, programs, services and results are explained to contributors and the entire community. The relations between Chest, Council, agencies and community are interpreted; agencies and related groups are counselled and helped with their publicity and public relations work. The heavy role that occurs with each Chest campaign is carried by this department.

Any social action should have the public acceptance in a democratic society. Not only the necessity for the survival of Chest and agencies demands the public should understand their work, but it is also a democratic obligation of those organizations to give interpretation. With the development of the Chest and the Council of Social Agencies it is only logical that the principal department for public education and interpretation should also have developed.

Research and statistics are vital equipment for both a planning and a financing organization. However it was not till 1946 when the burden of accumulating and organizing data became so great and the need so obvious that a Research and Statistics Department was formed. This department included a full-time director who could collect social facts from which both Chest and Council respectively could plan and act. The Research Department acts as the representative of national organizations, and collects monthly statistics from social,

health and recreational agencies in Portland and vicinity.

From this data a natural comparison can be made on the work of the agencies. The Research Department advises them in keeping statistics and in any research projects. Through the information supplied, the Council of Social Agencies can better help them evaluate their services in meeting the social welfare needs.

In connection with the Chest, research is needed in determining allocations to agencies and in connection with giving financial support to new community service proposals. "It seems clear that sound planning without facts will be purely accidental. The appraisal of results without facts can be little more than guessing."⁸ It is obvious that the work of the Research Department will develop in proportion to that of the Chest and Council of Social Agencies.

A central organization of social welfare agencies is a logical focal centre for persons to ask what agency or service would be best able to help them with their problems and questions. The Council and Chest have always had this duty to the community. As the Council and Chest developed, the personnel were informed on their own divisional responsibilities, and often queries from the public were passed amongst the various departments before arriving at the direct authority for an answer. An information service was needed to understand the community social welfare resources and to direct clients to the best service for their particular problem. A trained person with ability to understand the role of the community's social welfare agencies and to

8 Annual Report of Portland Community Chest, 1945.

analyse quickly the scope of the problem presented was required to give this information.

In 1944 a professional social worker was engaged as an information secretary, and in addition kept up to date a Directory of Health and Welfare Agencies. Statistics were also kept on the number of enquiries each month, and the various types of questions. From these statistics indication of the community need for some type of social welfare service can be shown. In 1949 there were over 200 enquiries a month on an average.

The other common services listed in the chart in Appendix are campship program and the Christmas bureau. The latter, already discussed, had during 1926 in the Council of Social Agencies, with the Confidential Exchange and the Public Welfare Bureau (the largest family relief agency), developed an Xmas giving program which arranged the distribution of gifts to hundreds of needy families without confusion, duplication or humiliation to the families. This function has been the responsibility of the Council of Social Agencies since that time.

The other common service of the campship program has been sponsored by the Council and Chest for the purpose of sending children to summer camp who could not afford to go on their own. Campships are given to those children who most need the vacation and will benefit most from it. Through the cooperation of school principals and social workers in recreational and counselling agencies, applications of children are sent in.

The Council of Social Agencies has the two main divisions, that of Family and Child Welfare, and that of Group Work and Recreation (see Appendix C).

A division of a Council of Social Agencies includes those agencies which have a common objective of a particular social welfare field. A division is similar to the comprehensive Council of Social Agencies, except that it is narrower in membership. Through connection with the comprehensive council it can supplement facts with the other divisions of the council in order that a total community picture can be achieved; and also the division itself gains a better knowledge of its specific role in relation to the other community services.

The need to bring social welfare agencies with a similar function together is inherent in community planning. In 1926 with the inauguration of a permanent Council of Social Agencies, there were three standing committees, the Family Relief committee, the Child Caring committee and the Character Building committee. These committees were composed of representatives from those agencies doing similar work as defined by the title of the committee.

The Family Relief committee and the Child Caring committee gradually became amalgamated into one division of the Council of Social Agencies. Today it is the Family and Child Welfare Division which has an executive committee convening monthly to direct the business of the Division between its general membership meetings.

There are approximately fifteen members of the executive committee who include:- the officers of the division, the

chairmen of all divisional committees, and three lay and three professional members-at-large selected by the officers of the division. Taking the 1948 Family and Child Welfare Division, other committees in the division were a program committee, a committee of executives, and committees to deal with specific community social welfare needs.

"The program committee is usually composed of a chairman and five persons representative of member agencies. The 1947-48 committee and its sub committees planned an all day Institute on the Cultural Factors in Social Work and prepared 'Proceedings' for publication; a series of four workshops interpreting the work of the Community Child Guidance Clinic to agencies and an Institute on Basic Principles of Casework."⁹

The Committee on Executives was drawn up in order that greater coordination might result through executives in both public and privately financed agencies discussing pertinent problems common to their child caring agencies.

The special committees included (1) a Family Agency Committee which prepared a plan for a family agency for Portland; (2) an Adoption Legislation Committee which prepared a list of long range objectives and four recommendations for immediate changes in adoption legislation; and (3) a Day Care Committee which interpreted to the Community Chest and to the Family and Child Welfare's and also the Council's of Social Agencies executive committees, the functions and problems of day care to working mothers in the community. This committee functioned also as a central planning area for the executives representing the nurseries.

9 R. Renfrew, Divisional Secretary, Minutes of Outline of Work of Family and Child Welfare Division, Nov. 10, 1948.

Under the Day Care Committee are:-

- (1) a Program Committee which plans the program of the Day Care Committee
- (2) a Sub Committee on Private Nurseries
- (3) a Sub Committee on Future Planning.

Other special committees included a committee to plan improved care for the aged, and the Review Committees of the Family and Child Welfare Division.

The Group Work and Recreation Division has also a similar breakdown, having an executive committee, program committee and five special committees including the Review Committee.

It will be seen that both divisions have these review committees which cooperatively assess the ability of the social welfare agencies in meeting community needs. The review committees are a part of the total structure of a Council of Social Agencies. The results achieved by them substantiate and complement those results achieved by the other committees. Each branch of the total structure aids the successful actions of the other. By each part functioning wholeheartedly and harmoniously the whole organization remains healthy and vital. Remembering the place that the review committee holds in relation to the others and to the total structure, study will now focus on the development and role of this facet of a Council of Social Agencies.

The constant assessment of the community social welfare services is an obvious function of the Council of Social Agencies. The review of agencies is not something unique but is inherent to a central planning body working to improve the quality of services. However, as psychology has attempted to account for

the everyday behaviour of man and to break down step by step the process of this behaviour, similarly this study is attempting to account for the particular review method of the Portland Council of Social Agencies and to break down step by step the review process.

All councils review their community services, some have an organized system; the Portland Council of Social Agencies has an annual organized procedure which bears study.

To study the process it is necessary to understand the structure from which it branches. The physiological study of the arm necessitates the study of the whole body. The study of the review committee necessitates the study of the Council of Social Agencies.

The history of the federated planning movement was considered in the first chapter, and some discussion was given to a few of the main controversial issues in Council of Social Agencies structure to show the influence that variety in structure can play. The roles assumed by a central planning body were illustrated so that the part played by the review committee could be viewed in relation to the other facets of the organization.

Focus was then placed on the development of the Portland Council of Social Agencies. From this study of the gradual growth of the local organization could be observed the relationship of the review committee procedure.

Having shown the basic structure from which the review committee stemmed the history of the review process by the Council

of Social Agencies will be followed up till 1945 when the annual review committee procedure was established.

The review committee procedure will then be recorded and analyzed step by step from the committee recruitment process, the preparation of review committee meeting, the process of the committee meeting, the passage of the tentative report, to the final approval. Having described and analysed the review committee procedure, the effectiveness of this approach will be discussed.

Chapter III

The Early Development of the Review Committee

Inherent in the function of a Council of Social Agencies is the constant appraisal of the existing social services in meeting the welfare needs of the community. The Review Committee is a medium through which this assessment is carried out.

The Review Committee of the Portland Council of Social Agencies developed from a survey group of about five persons who delegated one member to visit and investigate an agency. A report was submitted of this visit which, when approved by the total committee, was for the use of the Chest budget committee. The Review Committee has now evolved into a body of around ten, of which there is always a greater proportion of lay members. Annually it cooperates with a specific grouping of agencies in self-analysis of their service and submits a written report for use of budget committee, agency and itself.

In 1948 the purpose of the Review Committee was defined as follows:

"The purpose of the Review Committee is to assist in identifying and meeting the social needs of the community. This is a four-fold responsibility to be carried out according to procedures hereinafter outlined:

- (1) The Review Committees shall conduct, in a constructive manner, continuing study and evaluation of agencies with respect to function, staff and standards, and the community's need for such an agency.

(2) The Review Committees shall submit written tentative recommendations and shall interpret the agency's functions and needs at intervals to the agency and its Board, and subsequently to the Executive Committee of the division concerned, and then to the Executive Committee of the Council.

(3) When designated by the Executive Committee of the Council, the Review Committees shall interpret their recommendations to the Budget Committee of the Chest or other appropriate body.

The evolution of the Review Committee to the stage as that of 1948 may be traced.

A crude form of the review committee, then called the survey committee, was practised first in 1926 by the Council of Social Agencies.

"The Surveys are made under the direction of a General Survey committee named by the President of the Portland Council of Social Agencies, and which in turn names a special committee for each survey, the Executive Secretary gathering the main data for each survey."¹

This general survey committee in 1927 was composed of five members. There was no stated proportion in the committee of those who practised social work professionally and those who did not. The special committees for each survey consisted of four members each.

The first year of review work by the Council of Social Agencies all the member agencies were personally reviewed by the executive secretary.

1 Semi-Annual Report of the Portland Council of Social Agencies, June 15, 1927.

"Through these personal visits, she has been gaining a better knowledge of the agencies and can report that only kindness and good will have been met on every hand."²

Because it was the first year of the Council of Social Agencies, the procedure of personal visits by the executive secretary in order to review the agencies may have been wiser than that of committee visits.

The foundations of a cooperative alliance between Council and agencies may be more safely laid by one representative than by the medium of a committee which often might appear formidable and unpredictable. The executive secretary relayed reports from her personal contacts with the agencies to special survey committees. But there would have been a deeper and wider interpretation of agencies function if it could have been possible for the committees to contact the agencies directly.

Between May 1926 and January 1927 surveys of fifty-four agencies were made in this manner by the executive secretary.

"These agencies were grouped on the following basis:

- (1) Working Girls - 4 agencies
- (2) Recreation Camps - 9 agencies
- (3) Child Caring (delinquent) - 7 agencies
- (4) Boarding Home for Men - 11 agencies
- (5) Child Caring (dependent) - 15 agencies
- (6) Relief Agencies - 8 agencies.

Many of these agencies were visited by the executive secretary two or three times, making a total of approximately one hundred visits. Surveys have included all agencies of like groups, whether members of the Portland Council of Social Agencies or not."³

2 Annual Report of the Portland Council of Social Agencies, January 1927.

3 Ibid.

These groupings were not expected to be identical from year to year. Both the groupings, and agencies within groupings would change as some other service common to another group of agencies would come under consideration. Consequently agencies would not always be reviewed annually.

The special committees considered the reports submitted by the energetic efforts of the executive secretary. She made surveys of agencies whether members of the Council of Social Agencies or not if their function fell within the basis of a grouping. By this open door practice the Council established a more comprehensive understanding of the Social Welfare services in the community and interpreted more broadly the social welfare standards.

The material of the survey had been formulated mostly by the executive secretary who then brought it to the special committee for discussion and approval. Contact with the agency had been solely via herself. However in 1927 the sub committees, each composed of approximately four to six members, began to visit directly and to study the agencies, formulating their own reports.

Further to aid the special committees in assessing the efficiency of the agencies which they were studying, an outline for asking questions was given to each member by the secretary prior to visiting with the agency. The following outline was given to the sub committee on Boarding Houses for Homeless Men:

- | | |
|---------------|---|
| "(1) Scope | (6) Budget |
| (2) Function | (7) General Work |
| (3) Program | (8) Special needs problems |
| (4) Personnel | (9) Plans for the future |
| (5) Equipment | (10) Organization - machinery & movements already in existence for the purpose of joint action - joint service or better coordination of work." |

The reports submitted were terse, rarely over one page in length. A report submitted on the Public Welfare Bureau, one of the six agencies mentioned above, makes a suitable example.

"Public Welfare Bureau

June 10th 1926

Public Welfare Bureau in connection with Homeless Men or Boarding Houses for men.

Sends floaters (less then 3 months in the City) to Salvation Army.

Sends those more than three months in the City to Portland Commons.

Sends ex-service men, Spanish War Veterans or other soldiers to specific organizations caring for such men."

These reports, after being formulated by the special committee, were sent to the General Survey Committee. Unless a report was returned by that committee for further information, it was then passed to the Board of the Portland Council of Social Agencies and after approval was sent to the budget committee of the Chest.

The budget committee considered the findings of the General Survey Committee. Thus in a letter to the City Club, the secretary of the Council of Social Agencies in April 19, 1927, stated: "As a result of the Survey on Homes for Working Girls, a drive for a new building for one of the agencies was withdrawn."

Further the Board of the Portland Council of Social Agencies acted on the reports of the committee, as illustrated by their resolution on October 15, 1926:-

"That the Agency known as 'Grandma's Kitchen' is not a justified continuing agency for the following reasons:

- (1) Methods of operating unbusinesslike and demoralizing
- (2) No records kept
- (3) Duplication of work.

Work is done and can be entirely handled by the six other agencies in this work.

This action has been taken after report from a special committee in 1924 and also by the Survey Committee in 1926."

Three special committees were formulated by the Council of Social Agencies from the recommendations of the Survey Committee of 1927 to study social welfare needs in the community that demanded further consideration.

Again, in order to carry out sound evaluation, the need for a basis of criteria for assessing the community services became apparent to the executive secretary. In the Annual Report for 1927 she stated:-

"A complete survey of Portland's social needs and agencies, both public and private, administering to those needs is necessary before the individual survey can be relied upon to give the proper valuations of the service of that agency to the community."

By dint of constant emphasis, a complete survey was finally made in 1931 and has been the springboard from which measures have resulted to improve the community welfare services.

A recommendation stressed by the budget committee and considered periodically by the Board of the Council of Social Agencies was as stated at the 1927 Annual Meeting of the Council:-

"That pursuant to request from the Community Chest, a yearly service survey be made by the Portland Council of Social Agencies of the different agencies."

It has already been shown that surveys were carried out on groupings of agencies that represented problems to be studied. If an agency did not fit into one of these specific problem areas it might therefore never be reviewed. The agencies of the Council were not divided into set groups to be studied in categories annually. It was not till 1945 that the recommendation for an annual review of agencies was finally effected.

The Review Committee from its initiation with the Council of Social Agencies in 1926 was slowly developed year by year through practical experience into a more refined process.

Chapter IV

The Preparation of Review Committees

Annual review committees had been recommended periodically by the Chest over the past twenty years. They were initiated in 1945 in order to aid the Budget Committee "in assessing the function, program, efficiency and plans of each agency in relation to community needs and the work of other agencies....The work and reports of the reviewing committees are confidential for the Council only for guidance in its statement to the Budget Committee."¹

The review committee at that time could be likened to the mechanic who examines an engine to see that each bolt and shaft are of strong calibre metal and properly meshed to insure the maximum smoothest running. But agencies are not inanimate objects. They are not machines. They are organizations of people for people. A machine can be adjusted by a mechanic's tightening a screw and pouring oil on the friction point. A mechanic can adjust the machinery so that it is at its maximum output. But the corresponding function of the review committee cannot be achieved by such manipulation.

An agency may be coerced into accepting certain adjustments, but maximum efficiency can only result if the agency itself will give its fullest cooperation. The philosophy of social work stresses that in aiding people to live to their

1 Minutes of the Council-Budget Relationship Committee, Portland Council of Social Agencies, June 1, 1945.

fullest capacities, one does not point bluntly to maladjustments in personality and demand change; rather one aids the individual to discover these maladjustments himself; when he, through his own insight, can estimate his capacities, he can then begin to work towards self improvement.

This principle of social work was not emphasized in the first year of the annual reviews in 1945. Pressure to initiate them having been made by the Chest, the review reports were formulated as evaluation records to direct the Budget Committee of the Chest.

With this emphasis there was the danger that the review committee might act as an arbitrary assessor of agency efficiency, and overlook the need for participation and cooperation by the agency itself. Further, the review committee in being used solely as a tool of the Budget Committee was in danger of duplicating the budgetary function.

In such capacity the review committee would consider making recommendations in terms of the financial attitude of the Chest, and thus be checked in its forthrightness to emphasize change. Moreover to produce an authoritative estimate of the efficiency of an agency, the review committee should be largely composed of social welfare experts.

While the review committee should be the medium by which the Council of Social Agencies understands the problems and ambitions of the agencies, too close association with the Budget Committee may cause the agency to be apprehensive of frank and cooperative discussion.

In 1945 the review committee might not have stressed the participation and cooperation of the agencies in formulating the reports. Perhaps because of this the agencies sent the following letter to the secretary of the Council of Social Agencies:-

In April 17, 1946

"Whereas Child caring member agencies of the Council of Social Agencies were considerably distressed and embarrassed last year by the recommendations submitted to and approved by the Executive Committee of the Council and in attempting to prevent confusion and misunderstanding in future firmly request participation in discussion which would lead to other recommendations.

Whereas after meeting ... President of the Council of Social Agencies stated that future recommendations affecting agencies would be cleared with respective agencies before approval by the Executive Committee of the Council ...

Therefore be it resolved that reports prepared by such committees of the Council of Social Agencies be subject to study by affected agency or agencies before being acted on by the Executive Committee of the Council, it being expressly understood that such study would imply no interference with or invalidation of a report submitted to the Executive Committee."

--subsequently adopted

The stress of the review committee should be on constructive planning and it is through ~~the~~ cooperation that this is best achieved.

The Council of Social Agencies is a voluntary democratic association of agencies. Although despotically change can be achieved more quickly, because it is imposed it is often resented and therefore the foundation is not solid. The review

committee does not try to force agencies to conform; but it attempts to achieve change through recommendations and not through orders. In any case the agencies are autonomous and can disregard recommendations which have no persuasive power. This relationship between review committee and agency is illustrated by the following statement: "It is the responsibility of the Chest and Council to sell their point of view to agencies rather than to enforce their point of view."² By repeated review and association the agencies may gradually be indoctrinated towards improving to certain standards. Because of the independence of agencies, the review procedure should be such that it will give the agencies the maximum opportunity in participation, thus becoming more receptive to acceptance of the recommendations.

Structure

During 1948 the agencies composing the Council of Social Agencies for purpose of review have been divided into three main divisions, the Family and Child Welfare division, the Group Work and Recreation division and the Community Organization division. The last is composed of those agencies such as the Urban League and the Mental Health Association which carry out a community-wide educational program on certain subjects. In this study focus will be placed mostly on the Family and Child Welfare and the Group Work Division.

² From statement by Mr. Carl Freilinger, Chairman of Budget Committee of the Portland Community Chest, 1948.

The agencies of the Family and Child Welfare Division number 47. For purposes of review they are divided into four groupings. These groupings are made loosely on the basis of the following common denominators:-

Sub Committee I

Agencies licensed to place children for adoption

Albertina Kerr Homes
Children's Farm Home
Federated Jewish Societies
Boys' and Girls' Aid Society

Sub Committee II

Agencies serving both children and unmarried mothers

Catholic Charities
Salvation Army Citadel
Salvation Army White Shield Home
Volunteers of America
Fruit & Flower Day Nursery

Sub Committee III

Family Service Agencies

Women's Protective Division
American Red Cross
Legal Aid Committee
Travelers Aid Society
Visiting Teachers

Sub Committee IV

Public Agencies

Multnomah County Public Welfare Commission
Indigent Soldiers Fund
Court of Domestic Relations
Oregon State Public Welfare Commission
University of Oregon,
Out Patients Department

In the Group Work and Recreation Division there were ten agencies to be reviewed in 1949. A general review committee composed of nine members was divided into three sub committees in order to review respectively the three groupings into which the ten agencies were divided. These groupings were as follows:-

Group I

Boy Scouts
Camp Fire Girls
Girl Scouts

Group II

Jewish Community Centre
Young Men's Christian Association
Young Women's Christian Association

Group III

Catholic Youth Association
Linton Community
Neighbourhood House
Red Shield Boys' Club

The review committees study specific groupings so that special knowledge of the problems and services of a specific type of agency may be grasped; each review committee then does not have a superficial understanding of all types of agencies but focuses with this specific knowledge on one category of agency. However, because there are federations of agencies, such as the Catholic Charities, in the Family and Child Welfare Division, it is more practical that one committee should study the agencies of that federation, even though they may have different types of function. When the one review committee meets with the federation's central office it will have a knowledge of the overall administrative problems and services. By the use of one review committee the central office also will avoid the heavy time schedule which convening the several committees reviewing its individual agencies would involve.

The groupings are loose and, as stated before in the considerations of the Family and Child Welfare Division program committee, are under constant consideration whether they should focus only on one specific welfare problem (such as adoption), or whether to study selection of agencies or phases of agency program on a priority basis.

Before the annual reviews were formed, agencies would be studied if they were connected with a specific welfare problem under consideration. To review all the problems confronting agencies without some focus of study tends to be too broad a study.

The groupings include both agencies that are helped financially by the Chest, and also other voluntary and some

public agencies. However, because of the necessity for Chest agencies to have their review reports submitted to the Budget Committee, these agencies are given priority in time of review. Further agencies are requested to state any changes since the previous year and these often get further priority in schedule of visit.

The Family and Child Welfare overall Review Chairman, in writing to the executives of the agencies (see page), had stated: "The committees feel that they can make a more thorough study of each agency if those agencies contemplating or already offering new services are studied first. Reports will then be made available to the Budget Committee of the Chest as soon as they are completed."

The policy set out on composition of committee membership reads as follows:-

"The review committees of the Council of Social Agencies shall be appointed annually for overlapping two-year terms by October by the Executive Committee of the Council upon recommendation of the respective Executive Committee of each division. Each review committee shall be composed of at least three lay members and two professional members, informed and experienced in the field of the agency reviewed to the degree that they are available, and shall be supplemented by one staff and one board member of the agency being reviewed as non-voting consultants."³

This objective has not always been held. The executive committee of the Group Work and Recreation Division in September

3 Minutes of Procedures Committee, Council of Social Agencies, Portland, March 1947.

1948 had recommended that the review committee which previously had numbered six members should be increased to ten. This executive committee had suggested names for possible membership, and had recommended that the remaining three members of the past review committee whose two-year term had expired, should be asked to continue because of their specific interests and experience. One was able to accept the second term of office. In the 1949 review committee there were altogether four members who had previous terms on the committee, one of these members being the chairman of the 1949 committee.

In the Family and Child Welfare division, and focusing arbitrarily on the Review Committee II, two members, one of whom was the chairman, had already served the full term of two years. The divisional executive committee in October 1948 had recommended names for chairmen of the 1949 review committees of persons who had already served their full term on those committees.

In order to educate broadly in the community and to have stimulating new viewpoints, it is sound that there should be a complete turnover in review committees every two years. The difficulty of obtaining new members, and the desirability of continuing the use of the experience of the former members are considerations that often check this policy.

The amount of time that members are required to give is a principal recruitment difficulty. However, a paradox is that the most busy person absorbed in personal and community business often makes time to contribute the most. There is a limit to the amount of community work that the most

cooperative citizen can undertake efficiently; unless he can give active participation there is little benefit to the committee, and it is unfair to the person.

The newcomers to the community, especially those who have a previous record of keen participation in community affairs, should be enrolled. The review committee is an excellent introduction for such a person to the services and programs of the community.

The review committee can be the medium whereby the recalcitrant person can express his opinion and be exposed to other viewpoints. Through the practice of having committee members accepted by the agency executive prior to their enrolment, insurance is made that any personality friction would not be to the extent to block cooperation.

Alert critical members who are not too inflexible and destructive can give energy and life to a committee by their constant questioning; and the final committee results may be more fully discussed and therefore sounder.

The chairmen of the review committees, who are always lay people, have had previous experience on their respective review committees. With this background they have an acquaintance with agency personnel, have an understanding of agency idiosyncracies and have a knowledge of what the review committee should stress with the agency. Because the review committee membership is arranged so that there are always included some serving in their first year and some in their second year, this should insure that there are those on the committee with previous experience.

Considering the dual function of review and education, the committees should not be composed solely of persons who have already had review experience, nor should it be entirely deficient in these people.

Although it is desirable that the chairman should have had previous experience with the specific review committee, the other members in their second year should take advantage of the educational opportunities to review another grouping of agencies. Members often become so interested in the progress of the one specific group of agencies that they have difficulty in choosing another. They should however be encouraged to make this choice both from the educational value to themselves and also, as previously stated, from the fact that each review committee should have a constant influx of new members who can offer new ideas and criticisms towards an objective review.

With the required ratio of professional and lay persons on the review committee a blending of viewpoint is achieved by which the agency will receive a more objective analysis, and also be interpreted more widely in the community.

The definition of a professional social worker for the purpose of a review committee has been suggested as:-

"A professional social worker (by the standards of the American Association of Social Workers) who works in an agency similar in function to those contacted by the review committee." This means that those persons not at present practising social work but who have had previous experience in the social welfare field, and those social workers who are in a different type of

agency from that under review (as group worker reviewing case work agencies) are not considered as under the professional quota in a review committee. This narrow definition is apparently justified because the professional is one who is directly employed in the type of agencies being reviewed, and therefore can contribute to the committee an interpretation of the peculiar problems and functions of the reviewed agencies. However this could allow the lay composition to be completely of members who have had previous practice, or who are practising in the various other aspects of social work. Citizens who have any other professional background than that of social work would there have no representation.

The citizen is a valuable asset to the committee. He should not be considered as excess baggage that the professional social worker has to carry. The lay person represents the various views of the community and insures actions which will be acceptable to the community. He brings out factors ignored by the narrow objective of the professional, and often aids in removing the professional blinkers that block out the total community aspects of the problem. The lay person tempers the professional enthusiasm that would trip over itself to arrive hurriedly at a goal. He insures the test of good timing to launch a project. The obligation of interpretation in order to gain acceptance with the lay person is the democratic obligation to gain community cooperation. Harold Laski has written, "We must ceaselessly remember that no body of experts is wise enough or good enough to be charged with the destiny of mankind."⁴

4 As cited in Bernstein M.H., "Limitations of the Administrative Expert", Social Work Year Book 1947.

The social worker is guilty of sometimes considering that he is alone charged with the destiny of mankind, and therefore should always remember that alliance with the layman is one democratic insurance in order to check such dangerous despotic tendencies.

Although it is an obligation of the professional members to assist the lay person towards a greater understanding of accepted social welfare practices, it is an obligation of the lay person, as it is of the professional, to become informed concerning recent social work philosophy and practices.

Review Committee as Stepping Stone to be a Consideration
When Composing

The purpose of recruiting members is not solely that they should be active in the review committees, but that from the education they should be better equipped to participate in community affairs. The review committee is a stepping stone to further participation in such capacities as board members of agencies. Thus when recruiting members for committee, this aspect of training ground for potential board members further necessitates wide representation.

However the value of the review committee experience cannot be solely estimated on the number of boards that each member will join. The deeper understanding of community services and problems that the members attain will be shared through many informal channels that cannot be tabulated.

The presence of past review committee members on boards cannot be arbitrarily attributed solely to their association with these committees, but may often be the result of many factors.

The occupations of the members of Review Committee II of the 1949 Family and Child Welfare Division may illustrate the variety of experience that is represented around the committee table:

- A housewife active in community affairs and a past board member of agencies.
- A housewife who was a former nursery school specialist.
- A housewife who was a former family life education specialist.
- A superintendent of nurses at the medical school.
- A medical social worker.
- The director of the State Clinic for the Rehabilitation of Alcoholics.
- A psychiatric social worker.
- A nursery school teacher.

There is usually a preponderance of women on the committees. Housewives without families or with older families are often able to devote time to community activities. In view of the emphasis on the volunteer, some consideration should be given to an evening review committee schedule. Easier recruitment and broader community representation among volunteers might result. The proportion of women to men on committees might even considerably.

To achieve a community representative review committee there should be many sources from which to receive suggested names. "Any good organization should keep informed through its professional leaders about people in the community who would make good committee men. All committees should be representative of the principal interests concerned in a problem."⁵

5 Atwater P., Problems of Administration in Social Work, The University of Minnesota Press, Minneapolis, 1940.

Around the end of July a letter is sent by the secretaries to the agencies requesting names of possible members. Thus on July 22, 1949, the following letter was sent by the secretary of the Group Work and Recreation division to the member agencies which stated:-

"Within the next few weeks we will be considering membership on the Review Committee. As you know, the Chairman of the Council of Social Agencies invites the committee members. For his guidance it has been customary to prepare a list of names suggested by agency executives and staffs, Divisional Executive Committee and others. At this time I am requesting you to submit names for this list."

The review committee is composed not only of names suggested by agency executives, but also by other staff members of the Council, other social workers and by the many contacts the secretary makes in the community. Nominations are made by the divisional executive committee to the chairman of the Council of Social Agencies who makes the official appointments.

In the Family and Child Welfare division the list of potential review members is sorted by the divisional secretary into committees. He will know what specific groupings the members would be interested in reviewing, and can thus compose the committees accordingly.

Because the Group Work and Recreation division has a smaller review membership, it can shuffle members later into the sub grouping of agencies that they prefer. With larger numbers some tentative plan has to be arranged at an early date. Therefore in the Family and Child Welfare division after composing the membership the secretary then formulates letters

stating the tentative review committees to be recommended to the chairman of the Council. These are sent to the executives of the concerned agencies for their approval.

By this procedure there is little opportunity for the committees to be considered as personal arbitrary choices of one individual, and at the same time agency acceptance of the names of the tentative review committee members is insured prior to the members' notification of their committee role.

To illustrate, on January 10, 1949, the Chairman of the overall Review Committee of the Family and Child Welfare division sent out letters to agency executives in which she stated:-

"The suggested personnel of your committee is being recommended as follows:-.... If you have any objections to these names please call the secretary of the division with your suggestions by January 14th."

If there are changes to the committee requested by the executive, this is done confidentially.

The usual reply is as that formalized by letter from the executive of Albertina Kerr Homes of January 21, 1949:-

"...I am acquainted with the proposed members of the Review Committee and feel that it should be an excellent and valuable committee. I would certainly not have any objections to any of the suggested members."

When notification of acceptance has been received from the agency executives, a letter is sent by the Chairman of the Council of Social Agencies to the proposed members. In this connection it

is interesting to note that Atwater states: "A letter of appointment should go over the name of the appointing authority."⁶ It is a sound procedure that the divisional secretary should play the role of consultant rather than administrator, and should give constant recognition of the function and responsibility of the volunteer. For this reason correspondence, although often composed by the divisional secretary, should have the approval of the chairman if it is in his province.

The chairmen of the review committees are nominated by the respective divisional executive committees. The need for the chairmen to have had previous experience on the committee has already been explained. The divisional executive committee members have been in contact with the previous year's review committees, and can choose those members who could devote time and energy to make chairmen for the next year's work.

In the Family and Child Welfare division there is also an overall chairman of all the review committees because of their number. This chairman is also recommended by the division executive committee. He should be a person with considerable experience both in the council, the division and the review committees. In the October 6th, 1948 executive committee meeting Mrs. John Catlin who had been very active in Chest and Council work was nominated. The next year on February 7, 1949 the chairman of the Council of Social Agencies sent the following letter:-

6 Atwater, Problems of Administration in Social Work

"I have just been talking with Mrs. Renfroe (secretary) about the Review Committees for the Family and Child Welfare Division and the general over-all aims and program of this important division. You have been so much interested in this work and so helpful in planning that we would like to urge you to continue the general chairmanship of the Review Committees for another period of service.
I hope you will consent."

This chairman will assist any of the review committees, as for example if a chairman cannot be obtained for a specific committee, he will assume the role. He will attempt to give focus and interpretation where there appears to be greater need in order to develop cooperation with agency and committee. He will aid in the interpretation of the tentative review report to the executive committee of the Council. Due to his broad knowledge of all the agencies in the division, he will assist in formulating the general review recommendations of the division.

Orientation of Review Committee Members

It is in the letter which the Chairman of the Council of Social Agencies sends to confirm the appointments of review committee members that they are notified of the first general meeting. Quoting from the 1949 letter sent by the Chairman,

"An orientation meeting will be held at 10:30 a.m. on Wednesday, Feb. 11th, in Room D, Central Library, when you will have an opportunity to learn about the Council of Social Agencies and details of your assignments. I hope you will be able to attend this first meeting. We appreciate your acceptance of this important assignment."

Material was included from which the members could get a background prior to attending the meeting.

Thus again quoting from the letter:-

"We are sending under separate cover a workbook for Review Committees which will include the '48 Report of the Council of Social Agencies, a list of agency beneficiaries of the Community Chest, a list of member agencies of the Council of Social Agencies, a list of member agencies of the Family and Child Welfare, and lists of the Executive Committee of the Family and Child Welfare Division and the Council of Social Agencies."

Illustrating the orientation emphasis of this general meeting of the Family and Child Welfare division is the statement of the agenda:-

- "1. Welcome by Dr. Jaqua, Chairman of Council of Social Agencies.
2. Function of the Council of Social Agencies and work of the Divisions of the Chest and Council described by Executive Secretary of Council.

Question Period allowed.

3. Work of Committees described by secretary.

Question Period

4. Announcement of 1st meeting time for each review committee."

At this first meeting the desired relationship between agency and review committee is stressed as being one of co-operation from which is produced sincere suggestions for more efficient functioning towards community welfare. Review is emphasized as not being a method to thrust destructive criticism and to enforce conformity. The opportunity that review work offers for education of the committee members is stressed. The agencies are in the front lines, face to face with problems,

and the committee should look at them as the experts in their respective fields. The problems for the agency are not academic but practical issues. The committee members should feel privileged in being asked to analyze these problems with the agencies.

The review committee members have already received background material to aid them in understanding the review committee role, so that from this orientation they should have some comprehension of their function.

The Group Work and Recreation division, because they have only one committee, can accomplish this interpretation at its regular first meeting. A Review Workbook was given to the members at this opening meeting which included such topics as:-

- Policy statements and philosophy
- Procedures
- Criteria-yardsticks
- Organization charts of Chest and Council
- Duties of Council members
- Agencies of the Council and Chest
- List of Review Committee members
- Review Committee calendar (date of meetings).

At this meeting the divisional chairman gave a brief account of the value of review committee work. She illustrated the increasing cooperation between agency and committee by the example of an agency executive's insistence on annual review committees when the question arose concerning making it a biennial affair. The chairman of the Review Committee then interpreted the philosophy and function of reviews through a study of the Review Workbook and of the last year's general review recommendations. By studying the final report of the Red Shield Boys' Club agency of the past review committee, review process was further illustrated.

At their next meeting the chairman of the Council was requested to illustrate the role of the committee in relation to the Council. He stressed the necessity for the review committee members to think analytically concerning the means and not to be carried away emotionally because of the proposed ends. Again in their February 25th, 1949 meeting the use of criteria was discussed.

The emphasis on interpretation of the review process does not stop after the initial committee gathering but also during the next few meetings focus is still placed on seeing that the members have a full understanding of their role.

Although as shown the chief concern of the first meeting of review committees is that of orientation, it also permits the opportunity for administering more organizational details. It is here with the Group Work and Recreation division that the composition of sub committees to visit specific agency groupings can be arranged. The members can be given a list of breakdown of groups of agencies to be reviewed and can be asked to give consideration to the specific group that they will wish to review. They can be notified concerning the regulation that those personally associated with any agency cannot review that particular agency. This regulation insures greater objectivity of review. The groupings with first and second choices can be sent into the council staff member by a fixed time, and with this information the committees can then be drawn up. The council staff member has been informed by executives of agencies concerning the list of a proposed review committee which they

have already received of any specific member who for personal reasons they do not wish to have reviewing. Such a member could be placed in his alternate grouping should he have chosen the specific executive's agency that disapproved of him.

Each review committee at the start should choose a time for meeting that will be most convenient for the majority. There invariably are a few for whom the chosen time will not be satisfactory. However the few should bend to the will of the majority, and if they cannot arrange to make the meetings at that set time they should, if possible, be placed in another committee.

Having a meeting every two weeks is usually the most comfortable and practical schedule for review committees. More meetings can cause strain and absenteeism, fewer meetings can cause indifference. However standards cannot be strictly set, the amount to be covered and the interest of the members are the real determining factors concerning frequency of meetings. Regularity of the schedule of meetings does aid the members in remembering and in planning their attendance. Absenteeism means the failure of a committee.

The divisional secretaries have received notification from those agencies contemplating or already offering new services for the coming year, and have placed them first to be reviewed. After the general review meeting the tentative schedule of meetings with the agencies is formalized. The following timetable of committee meetings of Review Committee II of the Family and Child Welfare division illustrates the heavy curriculum set for the members:-

Meeting Schedule of Review Committee II
Family and Child Welfare Division, 1949

Time (Every Wed.)	Place of Meeting	Time (Every Wed.)	Place of Meeting
Feb. 16	General Meeting at Library	May 4	Council Meeting
" 23	Council Meeting	" 11	Council Meeting
Mar. 9	St. Mary's Home	" 18	Fruit and Flower Day Nursery
" 16	Christie Home	" 25	Volunteers of America - two departments
" 23	Providence Nursery	June 1	Volunteers of America - Nursery
" 30	St. Rose Home	" 8	White Shield Home
Apr. 6	Council Meeting	" 15	Council Meeting
" 13	Council Meeting	" 22	Salvation Army Citadel
" 20	Blessed Martin Nursery	" 29	Salvation Army Citadel and return to Council Meeting
" 27	Catholic Charities Central Office		

From a study of the schedule of committee meetings it is seen that agency visits often recur consecutively; however in an ideal schedule there would be a review meeting with an agency and then a meeting of the review committee alone at the Council of Social Agencies conference meeting when the tentative report drawn up from the previous meeting with the agency would be discussed. At this meeting, time can also be given to discussing the questions about the next agency to be reviewed. This insures that the tentative review reports formulated after a visit to an agency are not discarded by the committee, considered at some distant date and then hurried through without adequate participation by the members. The report should be the cooperative product of review committee and agency. With a heavy schedule there is the danger of the report being produced

from a few quick thoughts of members and the principal workmanship being that of the council staff member. Brushing over tentative reports hurriedly will automatically throw the full burden on the council staff member. Every precaution should be taken to see that a timetable is arranged that allows sufficient time for full participation by the committee in the formulation of review reports.

Chapter V

Preparation for Review Meeting with Agency

The divisional secretary, when arranging the schedule of meeting with the agency, will also request specific material. This will be incorporated into the review report, and will also be used by the review committee in formulating questions prior to the meeting with the agency. To illustrate is the letter by the Chairman of the overall Review Committee of the Family and Child Welfare division to the agency executives:-

"The 1949 Review Committee members are beginning study of your agency. Prior to their meeting with you, it will be helpful for them to have a statement from you giving information about the changes in your agency since the 1948 Review Report was written using the Review outline. It will also be helpful to receive a personnel policies statement if any has been developed since our last study."

The Group Work and Recreation divisional secretary wrote the following letter to agency executives, specifying the outline of the report they should submit:-

"...Before March 1st will you please prepare fourteen copies of the following material (mail copies to each of the ten Review Committee members and four to the office, two of which will be given to Budget Committee members whose names have not yet been received). The following material consists of:-

1. Statement of changes in function and services, if any.
2. Developments along the line of previous reviews.
3. Copies of personnel practices, list of qualifications (years of schooling & experience) of present staff.
4. Salary range of professional staff.

5. Copies of last Annual Report, if available.
6. Extent to which program and services have developed in the minimum-served areas.
7. Any other material of value to committee in understanding agency program.

By and large the agencies participate wholeheartedly in submitting the requested material. The review committee is solely for the purpose of aiding the agencies, and they should therefore help by writing a lucid comprehensive report. Sometimes the effort in formulating the submitted material is in proportion to the attitude of the agency staff towards the benefit of a review report. It is the job of council staff member and the review committee members to point out the benefits and sell the desire for cooperation.

Not only is this cooperation encouraged with the staff but also with the board. The Chairman of the Council sends individual letters to the presidents of the agencies' boards requesting board representation at the review meeting with their agencies. The final review reports are also sent to the presidents of the agency boards. Moreover review committee members request that they receive an invitation to attend a board meeting.

Thus on February 21st the Chairman of the Council of Social Agencies sent the letter to the President of Neighbourhood House Board:-

"The Review Committee is scheduled to meet with you and other Board members who can be present and Mr. Arthur Goldman (director) on Friday, March 4 at 10 a.m.

This is the fourth year in which Review Committees have served the joint interest of the agencies and the Council, and during this period a fine feeling of friendship and understanding has developed.

Under separate cover I am sending you a copy of the Review Workbook which summarizes the criteria used by the committee.

The list of Review Committee members and their assignments is for your information. I am sure the members, especially the ones designated to give special attention to Neighbourhood House, will appreciate an invitation to your Board meetings.

Mr. Goldman will receive a letter stating specific request for information and materials."

One of the criteria of the efficiency of an agency is the board's participation in agency function and its working relationship with staff. When there is a defensive uncooperative attitude on the part of the executive, the board may be the medium through which this is broken down. For these reasons, as well as that of courtesy, the letter is sent to the board president.

Self Review in Composing Report

The agency executive in making up the report of necessity assess the efficiency of the agency to the community. He has to consider the reasons why certain changes have not taken place. He has to consider why past review recommendations have been accepted or not.

The process of preparing a report is a review. It is commendable if this report is produced by the cooperation of more staff than just the executive. Members of the various departments should contribute so that the exercise of assessment is not solely given to the one executive. It is sound that all the members of an organization should be conscious of the aims they wish to achieve and of the progress they are making.

The development of the review committee procedure from a committee estimating an agency to that of the agency analysing itself in association with the committee has already been discussed. However one cannot achieve a sound self-analysis if there are not certain standards by which to judge.

Social work is a comparatively new profession and therefore it is still in the process of formulating principles that are basic to sound practice.

There is an enthusiasm to formulate standards that have not the hallmark of tested acceptance. Because social work deals with the human factor, there is complexity and intangibility. Moreover there is the constant emphasis on individualization and the fear of forced conformity. Therefore the utility of criteria is often checked by the extremes of fearful hesitancy and rash enthusiasm common to a new profession. J. Hoffer has stated, "It would seem that the local Community Welfare Council has a primary responsibility for formulating criteria in the agency and community."¹

The Group Work and Recreation division with the criteria in its Workbook aims towards emphasis of standards which result from objective evidence and have the approval of competent authorities.

The letter sent by the Group Work and Recreation divisional secretary asking for material from the agency also stated:-

"Under separate cover I am sending a copy of the Review Workbook which contains criteria that have been used by the committee and which are now generally accepted as goals."

1 Hoffer, J.R., "Use of Criteria and Factual Material in planning the Community Recreation, Informal and Group Work Program."

The Family and Child Welfare division emphasizes specific acknowledged points of social work philosophy each year.

For example in the 1948 review committees studying child caring agencies, emphasis was constantly placed on such fundamental child welfare principles as: "Children should be cared for away from their own families only after efforts to bring about favorable conditions within the home for the wholesome development of the child have been unsuccessful."

As standards are developed and accepted, a review exercise can be formulated by which the agencies assess themselves against this criteria.

Hoffer has described a guide which can be used by group work and recreation agencies for self evaluation. The functions of the agencies were divided into eight headings which included stated requirements. An agency would make a self analysis using one or more sections of the guide. The agency would rate itself in accordance with the following rating plan of the guide:-

- 1) If adequate
- 2) If weak
- 3) If outstanding
- 4) If conditions or provision does not apply.

The rating which the agency had assessed itself would be discussed with a visiting review committee composed of individuals outside the agency who would have already acquainted themselves with the function of the organization. From this review meeting the chairman would prepare a brief report of the recommendations which were agreed upon.

Hoffer explains that the advantage of such a review exercise is that all the parties concerned begin with an accepted yardstick. There is a guarantee that a comprehensive survey of all aspects will be made because of the outline; again the objectivity of the findings and recommendations is increased, and those concerned may raise pertinent questions that otherwise would prove embarrassing.

The Group Work and Recreation secretary is studying methods of self analysis by the agencies that might be adopted. The written comments and recommendations of the review committee of this division in 1949 were all connected with the submitted material sent in and discussed by the agency. In previous review reports the committee's remarks sometimes appeared in the report to have little connection with the agency's submitted material - giving the inference that the committee relied little on that material. By reading the final review report with this submitted material placed prior to the committee's remarks, the significance and context of these remarks could be gathered.

The Family and Child Welfare division at the program committee for 1949-50 stated: "Review Committees should study the 'Outline for Agency Self Evaluation of Personnel Practices' prepared by A.A.S.W. with the idea it is to be used as part of review procedure." Greater participation by the agencies in the review procedure is constantly sought by the divisions of the Council.

The review committee has a responsibility to become informed concerning the pertinent problems facing the agency, and to help constructively by their considerations.

The members study the agency submitted material prior to the meeting with the agency. Separate committee meetings to consider questions to be asked at each review with the agency should be scheduled, but as the season progresses, tentative review reports and discussions of problems brought up in review with the agencies make the opportunity for having committee time to discuss questions prior to meeting with an agency more theoretical than practical.

In the Family and Child Welfare Review Committee, members still prepare questions on the submitted material from the agencies. They convene to discuss these, if schedule permits, prior to review with the agency. If convening is impossible, the members mail their lists of questions to the council staff person. Preferably with the chairman or alone he can group these questions. The advantage of doing this in a meeting rather than singly, is that the area in which the committee becomes most interested can be probed by all views, clarification can be achieved to any puzzling portion of the agency report, and through stimulation of the group deeper thinking may result. Definitely at the beginning of the review committee, the questions should be derived in meetings so that each member may have an understanding of the trend of thinking.

These questions should be summarized and sent to the agency executive prior to his meeting with the committee. The preparation of questions makes the committee members show tangible evidence of study of the agency reports, also by being

sent to the executive eases his fear of being "put on the spot" by a sudden unexpected barrage, and gives him the opportunity to prepare any additional statistics or information that might aid in clarifying the answers.

To illustrate, on March 9th 1949 a letter was sent by the divisional secretary to the executive of the Albertina Kerr Homes:-

"I am writing to confirm the arrangements made with you by telephone to meet with you, the caseworker assigned to the institution, the board member representative assigned to the Review Committee and the President of the Louise Home Auxiliary at your Central Office in the Panama Building on March 14th from 10:30 a.m. to 12:00 noon.

The following questions have been worked out by the Review Committee for consideration on March 14th and 28th:

Central Office

(1) How is the caseworker's time divided between the Central Office and the institution?

(2) History and traditions of agency which relate to type of service offered?

(3) What about make up of the board, interests represented, committee assignments.

(4) Use of psychiatrist.

(5) Use of capital monies..."

Often it is helpful if, as well as forwarding this list of questions, the council staff member can talk over with the executive concerning both particular issues the latter wished to emphasize, and issues that he considered less significant. Written reports alone never tell the full story; behind the lines are personalities, and through the liaison of the council staff member, executive and review members may develop greater cooperation than correspondence could achieve.

The committee members receive from the secretary the most recent facts and opinions of the authorities in order to develop analytical questioning. Thus the members of Review

Committee II received the following suggested bibliography:-

Bender, Dr. Lauretta, "There is No Substitute for Family Life", Child Welfare League of America Bulletin, May 1946, p. 13.

Bender, Dr. Lauretta, "Infants Reared in Institutions", Child Welfare League of America Bulletin, September 1945, p. 2.

Lippman, H.S., "Newer Trends in Child Placement", The Family, February 1941, p. 327.

Pyles, Mary Lois, Institutions for Child Care and Treatment, pamphlet, Child Welfare League of America, February 1947.

Freud, Anna, Infants Without Families

Hopkirk, Howard, Institutions Serving Children

U.S. Children's Bureau, The A.B.C. of Foster Family Care, Publication No. 216.

Through the cooperation of the Research and Statistical Department of the Council, information is constantly sent to give an over-all picture of a problem. Such information in the 1949 Family and Child Welfare Division included:-

"A breakdown of the average daily per capita cost of institutional care of all children in the child caring institutions of Portland during 1947 and 1948. The number of children receiving care from all child-caring agencies by counties 1946 and 1947. Day Nursery Statistics for 1948 compiled from monthly reports submitted to the Research Department, Council of Social Agencies."

Therefore prior to the meeting with the agency, the review committee members should have read previous review reports, the material submitted by the agency, and any addi-

tional material on such as recent practices, philosophy, criteria of agency function etc. submitted by the council staff member. They should have formulated questions and understood upon what specific area of the agency the review should be focused.

Chapter 6

Procedure of Review Meeting

In the Family and Child Welfare division the review committee meets with the agency, the agenda includes a tour of the agency, and then a period during which the outline of questions sent to the agency executive by the division secretary is discussed. Thus on March 24, 1949 a letter from the division secretary to the Superior of St. Roses Industrial School stated:-

"I am writing to confirm the arrangements we made for the Review Committee to meet at St. Rose Industrial School on March 30th from 1:30 to 3:00 p.m. It is hoped that the Committee will be able to see the building in about half an hour in order to leave at least an hour for our meeting."

The procedure is flexible, as sometimes by having the meeting first followed by a tour of the agency, the activity by agency members can be better understood. Thus on May 26, 1949 the division secretary sent the following letter to the Executive Director of the Volunteers of America:-

"The Committee plans to discuss the programs of the two nurseries beginning at 2 p.m. first covering with you the Prison work and the Post and Mission. After the meeting is completed, perhaps the Committee can see the nursery."

Through this procedure, the committee, after the discussion, could see the children at play when they had finished their afternoon nap.

The tour through the agency can clarify visibly the agency report. Precautions on the tour should be taken to guard the confidentiality, if necessary, of the clients. When possible, the staff responsible for each department should be on hand to explain its respective function. From the point of the agency this is sound staff training, and from that of the review committee gives the opportunity for a quick appraisal of staff. It also avoids to some extent the danger of a modified interpretation of services by a more remote top executive. The tour is a method wherein a more informal and therefore more informative atmosphere can be developed.

It is after the tour, which should not overrun the stated time, that there is usually the meeting at which the agency staff gives a brief resume of the submitted report. Various points can be clarified there and additional material can be added by the agency staff. For the reasons stated above, it is sound that the personnel who are directly connected with the departments being reviewed should be present and participate in this meeting.

The committee members should follow the agenda of questions submitted to the agency. Further questions will have been stimulated both from the tour, from the added comments by agency staff and from association in the meeting itself. It is helpful if the members carry notebooks to write down these additional queries as they arise so that in waiting to ask them in the order of the agenda, they are not forgotten.

After the members have completed their questions there should be a further opportunity for the agency staff to explain

what special aspect they would like the committee to recommend. The committee is not obligated to recommend this, but it not only shows what particular focus the agency is stressing, but also ends the meeting with the agency feeling the desire of the committee to cooperate.

The Group Work and Recreation division review committee consider it sound, if members can spare the time, that they should continue convening after the agency personnel have withdrawn. By this they should be able to formulate comments and recommendations fresh from their observations. The result of this thinking should be developed into a tentative review report by the council staff member later, and copies given to all the members for corrections and additional comments and recommendations.

The Family and Child Welfare review committees do not convene alone directly after the meeting with the agency. If the committees are unable to devote their next meeting for discussion, the members individually then send suggestions to the divisional secretary from which she formulates a tentative review report for their later approval.

As pointed out previously, due to the heavy schedule there is danger that the formulation of the tentative review report, unless discussed directly after the meeting with the agency, may not be given sufficient attention by the complete committee. It requires constant emphasis by the divisional secretary to insure that the committee does participate fully in the formulation of the comments and recommendations.

The Council Secretary's Role at Review Meetings with Agency

The council staff member serves as a consultant and secretary of the committee. As shown he should refer the most recent writings by specific authorities on pertinent review material to the committee members. He should not give one point of view, but should give authorities that stress each side, and the members should determine themselves which philosophy should be applied.

Prior to the meeting with the agency, the divisional secretary should have knowledge of what members will be present and absent. He should have rechecked his knowledge of the names of agency staff with whom he has been acquainted, he should always be a few minutes early in order to introduce staff to review committee members and ease any defensive attitude by either. He should have spare copies of previous review committee reports, of agency reports, of the question list submitted by the members, paper for minutes and any other material to which he might need to refer.

It is the responsibility of the divisional secretary to see that minutes are kept of the review committee meetings. Minutes require tedious work, but they are a document of the process of the review report, and are necessary for reference and research. Questions do arise concerning the background of certain recommendations and a record is needed. Minutes also can be referred to by members to understand better attitudes and philosophy. Moreover they can be used to inform absent members of committee business. It is also a professional obligation

to keep records that can be used in reference to develop a better knowledge of the social welfare field. For these reasons the divisional secretary should see that minutes are kept.

To aid the chairman, it is an excellent practice for the staff member to talk over the various items on the agenda with him prior to the meeting. The chairman can feel more secure in his role, and can know to some extent what topics should absorb more time and thus can organize his meeting more efficiently. He can encourage members to discuss various issues, but by having a prepared agenda he can adjourn on schedule, knowing roughly the length of time that can be spent on each issue. Lengthy poorly-organized meetings cause discontent with the resultant absenteeism of members. The divisional secretary should study analytically the reasons for absenteeism. A member's stated reasons may not be the basic ones.

Mechanisms are used to develop good attendance.

"To insure regular attendance some organizations feel that the best method is a form letter or a type-written letter announcing the meeting five or six days in advance. Whatever written notice is employed, it has been clearly proved by experience that a telephone reminder on the day of the meeting is invaluable in stimulating attendance. Many people are careless about their engagements and forget the meeting unless reminded in this way."¹

A method has been to send out a return stamped postcard in which the member ticks off whether he will be present or absent. This card is sent out a few days prior to the meeting.

1 Atwater, Problems of Administration in Social Work, p. 43.

Again to urge absent members to attend and also to keep them informed of past proceedings, the minutes of the review committee meeting are sent out to all members. At the top of the minutes can be a list of the members who attended and also of those who were absent. This statement may encourage members in their attendance.

It appears unnecessary to have a set number of times a member can be absent to be dismissed. If a person has a legitimate reason for having missed meetings, and still wants to contribute, he should not be debarred. If he does not attend through lack of interest, then he should be requested to resign. In other words he should not be debarred because of the number of absentees but because of his reasons for those absentees. However there develops a stage where a member, no matter how enthusiastic to contribute, will have missed too much of the previous meetings to be of value to the committee. Even in review committees where recurring different agencies are on the agenda to be reviewed, it is hard for a member to join the committee after it has been participating for a few months. The members have developed in their own thinking and have a background of references in their meetings to the other agency problems reviewed, which is hard for a new member to comprehend.

Council staff members should be particularly alert to a potential member who has a record of absenteeism at committee meetings. The absent member does not help the morale of any committee.

Volunteers cannot be regulated into attendance; rules may help

but the crux of gaining good attendance is in the sense of satisfaction through participation that members achieve.

The divisional staff member should be a democratic person and of necessity requires many assets of personality. He can influence and sway the thinking of the members. The other professional members in the committee insure that he is not a complete monopolistic source of social work interpretation. He should be a mature person who does not need to assert his own ego in a group. He should be so sincere in his belief of committee function that, regardless of his personal bias on issues, he will always see that every pertinent angle is explained and the issues objectively analysed. He should be able to sum up and to clarify issues that have become confused. Dealing with social welfare services and problems often results in members seeing the moralistic end and resenting the questioning of efficiency of any means to that end. He should be aware of the emotional components of the individual members.

Regulations cannot be laid down as to how and when a staff member should work with a committee. A committee is too complex an animal to be reared on one standard diet. The ability to work with committees is the ability to work with people, attributes that are not learnt solely by definite rules. The principle underlying the many individualistic approaches of staff member to committee is that of democratic values. The staff member can abuse his position, but it is up to him as a professional person to guard against such abuse.

Chapter 7

The Report

The report formulated by the review committee has a passage of inspection to follow before it is given the official stamp of approval. This is representative of sound legislative procedure. In the heat of the front line rash statements are often made which need tempering. Again passing through other committees brings more objectivity to the report because other ideas and opinions are contributed. Although a more objective product may result, there is also the danger that it can be reduced to an insipid ineffective paper. Representatives of the review committee should appear in person in order to defend their opinions before each committee that analyses the report, and any changes should be sent back to the review committee for their consideration.

The primary purpose of this passage of the report through the other committees is the wider circulation which gives opportunity to interpret the community social welfare services and problems. However, before passage to any committee, the tentative report formulated by the review committee is sent directly to the agency for comments.

The policy is stated thus:-

"That all tentative recommendations growing out of study and discussion with agencies shall be submitted in writing to each agency concerned before they are incorporated in the final report to the appointing group.

That this be expressly understood that such study (by the agencies) would imply no interference with or invalidation of the report."¹

By this procedure the agency can ask to give further clarification if it feels that the committee has been biased or has omitted an important aspect. Sometimes an issue or further information arises after review meetings which the agency, on studying the tentative report, feels should be added.

Some feel the agency should check its submitted material which is indoctrinated in the report, but should not be permitted also to request change to the tentative commendations and recommendations made out by the review committee. However it should be an unusual occasion that the agency and the review committee are at complete odds over a report. The purpose of reviews is to build cooperation, not to cause resistance. Moreover at the meeting with agency, controversies should have been aired and therefore some compromise considered at that time. If an agency bitterly opposes certain recommendations written in the tentative report, generally there would be no gain insisting that they should remain. Such recommendations may be premature or unwarranted.

When the review report is returned from the agency it is then sent to the Division Executive Committee which checks the report and returns it to the review committee with suggested changes. When redrafted to suit both, the report then goes to the Council Executive committee for acceptance. After this committee acts favorably, the stamp of approval can be applied.

1 Minutes of meeting of delegate body of Council of Social Agencies, Portland, July 22, 1946.

Little change is usually made to the reports by the executive committees of division and council. It is logical that these two committees removed from the concentrated study given by the review committee should not be overly enthusiastic to change the context of the report.

Procedure of Passage Should Be Flexible

The review committee procedure needs to be flexible to handle emergencies. For instance, the review committee may be requested to consider an immediate problem of the agency which could not delay till the report passed through the various committees. To give immediate action the review committee should send a letter straight away indicating its attitude. Thus on April 6th (which would be two months ahead of the final approved report being sent to the agency) the following letter was sent to the director by the chairman of the review committee:-

"The members of the review committee are sympathetic with the need for a competent athletic director. As you know, reports from the review committee are not circulated until both the Executive Committee of the Division and the Executive Committee of the Council of Social Agencies have given approval. We realize the urgency of the personnel situation with which you are confronted. Members of the review committee are of the opinion that a competent athletic director can be secured within your budget if it is made clear that this person is not responsible for administrative work other than the health and athletic division. We hope that the suggestions made at the meeting have been followed with good results."

The agency may have some significant aspects as a change in program or additional information, which has occurred after the tentative report came to them for consideration. The agency therefore might send these recent details to the committee level at which the report has arrived.

Procedure is for the purpose of facilitating action; it is no longer fulfilling its purpose if it obstructs action. The review procedure therefore should be flexible in all exigencies, and material should be able to be submitted right up until the final approved report is passed.

The review committee reports may be considered only by the very narrow circles of the agency executive and the review members themselves. Further by the next year the report may be placed in mouldy files to be forgotten. It is, as stated above, to avoid this limited interpretation that the review reports are passaged through the various committees. Further to insure against such a fate each successive review committee should repeat fully in its report those past recommendations that have not been carried out and are still considered effective to be passed.

Again every five years the history of review committee recommendations should be written up, showing those that have been effected by the agency, those that have become obsolete and those that still have to be effected. This history should prove a stimulation to both review committee members and to the agency.

Further to guarantee adequate circulation of the review reports, after their final approval by the Council of Social Agencies, they are sent to each member of the agency board, to the executive of the agency, and to the Chest budget committee. Also the general recommendations, which are discussed below, are sent to board members of every agency of the Council, to executives of the agencies, to all members on the Division mailing list, and to the Chest budget committee. Two copies of both general

recommendations and specific review reports are reserved for the Council files; mimeographed copies of these are made available for the succeeding review committees.

General Recommendations

All Social problems as prostitution, unmarried mothers, neglected children, etc. have common causative factors and are interrelated. Consequently the community services tackling the social welfare needs should also be interrelated. Efficient community welfare results where the central administration checks that the services neither overlap nor leave gaps. One specific agency tackling its special community problem cannot be most effective unless it is coordinated with the total community services. Similarly, the individual review committees focus on their specific groupings of agencies, they cannot make effective recommendations from the viewpoint of the total community. They do not, as does the Chest budget committee, have to judge the necessity for an innovation in one agency's services against another agency's service. For example, if the review committee considers an agency needs the services of two additional case workers, but knows that the community will be absorbing funds in a community centre, the review committee does not weigh the relative advantages to the community of case workers and centre, it is focused solely on the efficiency of the agency and therefore recommends the caseworkers notwithstanding. Consequently to comprehend the efficiency of the whole community services, there are divisional general review committees. In the Family and Child Welfare division this overall committee is composed of its general chairman (described previously on

page 59) and also the individual chairmen of the review committees. The specific reports of each review committee are considered together, and recommendations that affect all the groups of agencies are formulated. These general recommendations are sent to the executive committee of the Council of Social Agencies for approval, then are circulated as described above.

The Extent of Review Study

The total function of a social welfare agency is a large area for a voluntary group to review intensively in a few committee meetings. This report that is produced should be considered realistically.

The review committee cannot be a research committee. Therefore it should not try to take the role of the special divisional committees to investigate specific social problems (as that of unmarried mothers) but rather should recommend formulation of such sub-committees if intensive study is required. However the review committee should not be so superficial in its report as to cause dissatisfaction to both agency and itself. Some persons consider that only by increasing the membership of review committees and by narrowing the basis of review to specific areas of an agency's function can sound recommendations result and the danger of superficial coverage be avoided. On the other hand it does seem that to understand specific areas a knowledge of the total agency function is necessary. Again the narrow area on which the review committees focus, may not be as paramount a problem at a particular stage to one agency as it is to others.

The Family and Child Welfare division has a sound method in which the review committee covers the total agency function but also stresses one aspect of the agency (as supervision of foster homes) at the same time. The coverage of the total function is not intensive, yet it permits an understanding of the specific aspect considered, and also gives the opportunity for the agency to explain some other problem that may be of paramount difficulty at that time. There will be problems that are overlooked, but this is an annual review and some work should be left for the succeeding committee. Further too large a dosage of recommendations are hard to swallow, but given in small and regular amounts they are more effectively absorbed and more easily digested.

Some consider the review committee should convene every second or third year to analyse specific problems in these intervals. But this committee is not for the purpose of research in order to give categorical answers concerning the problems of the agencies.

The contribution of the review committee is not that of knowledge but of wisdom. Annually together with the agency the committee consult on the effectiveness of function. If some specific aspect requires more fact finding, then a sub-committee can be recommended. However the committee to act wisely needs to be alert to the issues that surround a problem. Although itself not being a research instrument, the committee should study all the data that has been obtained. It should be aware of the changing aspects in the community and be receptive to progressive thinking with which to tackle issues. In the long run if the

review committee is offering sound analytical cooperative thinking, agencies will enthusiastically demand its association, and consider keenly recommendations.

It is somewhat of a dilemma when the agencies about whom a review committee should proffer much constructive criticism are highly sensitive to any recommendation, while the agencies about whom a review committee has little to proffer are eager to receive any constructive criticism. However it should be constantly remembered that the report is only one of the products of the review committee. The products of cooperative understanding and education by all connected with the review should never be minimized.

The review committee has several mechanisms in order to facilitate cooperation with an agency. Because it is a blending of professional and lay representation, it is a two-edged sword, and an agency must consider its review report. Again, because of this composition of the committee and because representation from the board of the agency is also invited to convene, either the lay or professional factors can work together to gain greater cooperation. If an agency executive is defensive and resisting, the associations between lay committee members and board representation may be the means to interpret the need for cooperation. However if the board is the stumbling block, the committee can support the executive and voice the criticisms that he could not state. This wedge should not be used to play executive against board and vice versa. These inroads to influence should be used to develop cooperation, and break down

suspicion of any autocratic approach. The salesman may place his foot in the door to gain an opportunity to show his wares, but he still has to sell them once he does get acknowledged. The philosophy of the Council to sell its viewpoint rather than enforce it must be constantly remembered.

A community social service should be open to the democratic influence of community inspection. It should not have an uncooperative iron curtain between its activities and the community. It is when an agency will close its door to review by the community that the community must become alarmed concerning that service.

Now agencies are made up of individuals. In attempting to aid them to gain a self awareness of their contribution to the community welfare, the principles of social work as applied to the individual should also be considered to the agencies.

Casework Approach in Report in Order to be Effective

The social worker jeopardizes his relationship with the client when he hurries the process of insight beyond that which the client is prepared to accept. The review committee also must work cautiously until it has established a sound cooperative relationship with the agency. The review report itself is formulated to ease resentment by having a section for commendation prior to recommendation.

There are those who feel the review reports are too vague, insipid and inconsistent. They consider the reports, in not asserting recommendations bluntly cause ambiguity and consequent dissatisfaction by both committee members and agency.

It should always be remembered that the report is not the sole product of review committees, the understanding and cooperation by the agency staff are important outcomes. The report should not be so worded to jeopardize these latter factors. Therefore during the initial years with a review committee, the agency may be more receptive to gentle subtlety in the submitted report. The purpose of the review committee is to develop a constructive cooperative relationship, not a destructive strained hostility. There comes a stage at which the agency is prepared and wants blunt straight forward comments. The committee also is being destructive to the relationship with the agency when it ignores this demand.

It might therefore be stated that as a general practice there is a wooing period of a few reviews during which the agency develops a confidence in review procedure.

The role of the Council and review committees is not authoritarian, recommendations should not be harsh and aggressive, but they should be clear for the agency to understand. The advantage of asserting accepted standards is that the agency does not feel personal antagonism. The Council, as before stated, should attempt to develop continuously standards that can be used as criteria in reviewing agencies. In making recommendations it is realized that the review committee is not expected to present a solution of authorities, but it is also not formed to give purely opinion. The recommendations of the committee should as often as possible have the support of reference to accepted philosophy and practice.

It is again stressed that an agency should not be swamped with a heavy flood of recommendations in one report. The adage that "Rome cannot be built in a day" should be remembered by a committee enthusiastic to quote recommendations. The agency can digest so much, and can innovate so much within the year.

Amongst the recommendations are those for an educational purpose which are not expected to be achieved immediately. The committee often does not clarify that it considers these recommendations on a long term basis. Perhaps there should be a recommendation section for immediate change, and one in which the long term aspect is considered.

Without this delineation the agency may become confused and irritated, being unable to carry out immediately all recommendations. It may feel the committee is stressing idealistic utterances with little understanding of the difficulty to implement them. The review committee itself may also become confused and feel there is little purpose to its work unless the agency implements all recommendations.

The members of the review committee should be chosen primarily for their ability to think soundly. The review report is the product of their judgment with that of the agency on how it should most effectively tackle the community problems. The review committee is aware that the report is only one product that will result from the meeting with the agency. The education of the members themselves and the developing cooperation of the

agency are most important results. The purpose of the report is to aid rather than stultify these other outcomes. Further study will show that the effectiveness of the review committee is not to be assessed solely on the written report.

Chapter 8

The Effectiveness of Review Committees

The review committee is the educational process whereby public-minded citizens learn of the problems of their social welfare services in meeting community needs. The influence that such an educated group of citizens can play on their community is intangible but obviously most effective. Over the five year period that the review committee has been inaugurated, there have been one hundred and sixteen citizens who have served on the review committees:¹

73	served	1	year
31	"	2	years
8	"	3	"
4	"	4	"

Of this number there were thirty-seven men and seventy-nine women.

83	served on the	Family and Child Welfare Review Committee
15	" " "	Community Organization Review Committee
21	" " "	Group Work and Recreation Review Committee

Although it can be assumed that some of these members would have served on other social welfare boards without any impetus of a review committee experience, it is also fair to assume that a number of the members did continue on to participation in other social welfare boards because of their experience in the review committees. In either case, because of the education derived in the review committee, these members who served other boards had a keener knowledge into the difficulties of

1 Background statistics for this chapter have been obtained through the cooperation of Miss Roberta Perkins, Secretary to the Council Executive Secretary.

their specific agencies, and also had a broader attitude in knowing the other community welfare services. Consequently they reckoned in cooperative-agency-action terms rather than always in a narrow one-agency focus.

Eight members of the review committees have served on the Community Chest board, one served on the Chest Executive Committee and seventeen served on the Council of Social Agencies executive committee. In all, forty-one members of the review committees have served on the boards of other social welfare agencies.

Again it should be emphasized that the educational influence of the review committee cannot be assessed tangibly. The number of review committee members who branch into service on other social welfare agency boards are not a criteria of review committee influence. The daily personal and business contacts of every individual committee member are an opportunity for interpretation of community services and problems. The education of each member spreads across the community like the widening circles formed by a stone dropped into a still pond. One hundred and sixteen civic alert citizens have an undetermined but forceful educational influence in their community.

Scope of Education of Members

There were twenty-one agencies that the review committee contacted in 1945. Included in these agencies were some that were a federation of agencies as Catholic Charities, Federated Jewish Societies. Thus, counting the individual agencies composed in these federations, there were forty-one services reviewed in

that first year. In 1949 there were twenty-two agencies with forty-six services that were reviewed.

Breaking these agencies down into their respective divisions, in 1949 the Family and Child Welfare review committees reviewed thirty-three services within twelve agencies; the Group Work and Recreation review committee reviewed nine services within six agencies; and the Community Organization division reviewed four services within four agencies.

These services have been reviewed:-

Number of years reviewed	5	4	3	2	1
Family and Child Welfare	17	9	5	6	2
Group Work and Recreation	6	3	-	2	2
Community Organization	2	2	2	-	1

These numbers illustrate the comprehensive community viewpoint that the review committee members can achieve due to the number of community services that are reviewed. They also illustrate the acceptance and consequent effectiveness of the review committee process by the social welfare agencies themselves. The large scope of study covered by the review committee is demonstrated by the categories of recommendations as shown on graph A, page . The similar recommendations made annually illustrates the persistent educational barrage. Although the number and type of recommendations do show the extent of review, they do not measure the effectiveness of the report.

From reading the review report exemplified by that on the Visiting Teacher Department in the appendix, it will be seen the review committee does not formulate a list of instructions annually but

rather it poses a number of queries that the agency should consider.

The Executive Secretary of the Council of Social Agencies has stated that the role of the review committee is to ask the right questions rather than to state the right answers. He considers that the effectiveness of the review committee should not be judged solely from the number of recommendations that have been carried out, rather it should be from the consideration that has been stimulated in the agency due to the recommendations. A recommendation is not ineffective solely because it has been refuted by the agency. The process in analysing the reasons for rejection in itself has proved the effectiveness of that recommendation. The consideration that the review report receives is something that cannot be tabulated. However, to illustrate that recommendations do receive consideration by agencies, the following examples will be given showing both recommendations that were accepted and were not accepted by agencies.

The Visiting Nurse Association is a member agency of the Portland Community Chest and the Council of Social Agencies. This Association provides skilled nursing care in the home and also gives a nursing service to private kindergartens sponsored by the Parent-Teacher Association.

Among the generalized nursing program is the care for tuberculosis patients through home visits and at clinics. The review committee in 1947, 1948 and 1949 recommended that this specialized service to tuberculosis should be taken over and financed by the City.

Thus in June 1948 included in the review report:-

"The Council commends the Visiting Nurse Association for developing the tuberculosis work and the Infant and Well Baby Clinic Programs to the point where the City Public Health Department recognizes these programs as the City's responsibility to administer from now on."

And the Council recommends:-

"That the Board of Directors of Visiting Nurse Association advise the City Council that the entire Tuberculosis program will not be carried after July 1, 1949. This program is now a well-accepted responsibility of Public Health department and voluntary money spent for this purpose should be used instead for unmet nursing needs as greater bedside nursing service."

In October 28, 1949 the Director of the Visiting Nurse Association wrote:-

"Our Association Board meeting on June 16, 1948 ... voted that a letter be sent to the City Council stating that the Association will accept responsibility for the Tuberculosis Nursing Program for the next city fiscal year due to the flood emergency but it is unwilling to assume it for '49-'50 unless more satisfactory financial arrangements can be made."

The City Health Department, faced with the issue of financing the tuberculosis service, stated that it could not afford to finance this service on its present scale of visiting nurses. If the Board of the Visiting Nurse Association decided to disband the service, then the city could only shoulder the responsibility on a modified scale.

The Board decided the service was too vital to be curtailed in its efficiency by passing responsibility to the city. Again, the staff appreciated the opportunity to carry out a generalized field of nursing with tuberculosis visiting included. For

these reasons the Board decided to reject the recommendation of the Council of Social Agencies.

Although the recommendation of the Council was not accepted, it resulted in much discussion and deliberation. The review committee does not know all the aspects to a problem for it is not as close to the situation as the agency. However, because of being more removed, the committee can often point out a direction of thinking that the agency, hemmed about, is unable to see. The duty of the review committee is to probe with queries, the decision of action rests with the agency after deliberation and consideration of the review report.

In the 1949 review committee report on the Boy Scouts organization of Portland, the following comment read:-

"The executive committee of the Council wonders why there are no women on the Board of Directors. In view of the large number of volunteers serving as Den mothers it would seem particularly desirable to have them represented on the Board."

Sometimes traditions become so engrained and accepted as the natural logical procedure that it requires the viewpoint of the outsider to point out alternatives.

The local Boy Scout organization had not considered the representation of Den mothers on the board, yet as one board member on reading the recommendation remarked, it did seem a logical step that the organization had before never queried. Whether there are reasons within the organization for not adopting this recommendation remains to be seen; but the effectiveness of the recommendation is that it has caused them to consider a tradition.

The review committee with its less intense relationship to welfare problems has opportunity for this more objective viewpoint. Specific knowledge and direct contact with a problem can shroud out the total vision; cool deep judgment can be offered by the outsider weighing the various aspects.

Therefore the effectiveness of the review committee must not be measured in the validity of its judgment solely; it is rather by the consideration given by the agencies to its judgment, although this consideration will become consequent of the soundness of judgment. The judgment of the review committee however rests often on the theoretical, the practical application by the agency may cause such theory to be as yet impractical. However blueprints are necessary for sound building, ideals should be stressed towards which the practice should aim.

The crux of the effectiveness of the review committee lies therefore in the cooperation of the agencies. Since 1945 this cooperation has been steadily increasing. The discussion leader on the topic "Five Years of Review Work" at the 1949 Annual Meeting of the Council of Social Agencies stated:-

"Initially some of the agencies were a bit suspicious of the committee's motives and thought of the committee as 'snoopers prying in their affairs'.... Over the period of years there has been a growing cooperation of the review committee and the agencies."

Although there is constant questioning concerning further adaptation of review committee procedure (a healthy attitude of practising what one preaches), there is no longer any significant suspicion or resentment against the review committee itself.

The agencies have declared their acceptance of the review committee process. There is a record vote of Council delegates in 1947 requesting that review committees be established as year around committees. More recently at the annual meeting of the Council of Social Agencies in 1949, the delegates voted unanimously to request that review committees be continued.

There are two secondary functions of the review committee. First the function of assessing the agencies for the benefit of the budget committee was that which motivated the initiation of the annual review committee procedure.

As pointed out prior, the budget committee needed more understanding than a one-meeting presentation by the executives in order to allocate soundly the Chest finances. The knowledge accumulated by the review committee could be used to advise in problems of allocation. The mechanism of budget committee representation connected the review committee's consideration more closely with the budget committee. The completion of review committee reports prior to the sittings of the budget committee gave the opportunity to consult that material. The advantages of a more enlightened budget committee can readily be seen. Allocations could then be made more justly and intelligently to the agencies.

Second the function of educating the community concerning their social welfare services has also been emphasized. By recruiting lay members direct interpretation results, and interest is kindled, starting a flame whose intensity and effect is indeterminate. Again there is influence of the review committee

upon professional members in showing that other agencies have similar problems, and in learning that cooperative planning can result in greater efficiency of the community services in meeting the social welfare problems. This function of education by the review committee is of far-reaching significance in the community. It is apparent that these two functions are interrelated - a report of interest to the budget committee can result in education of the members producing it.

The main function of the review committee is that of cooperative review. The agency cannot be enthusiastic to convening with a committee unless there is this sound analytical review accomplished. Yet one of the secondary functions of budget committee interpretation or of education to members can take paramount importance to the detriment of the whole review committee procedure.

If over-emphasis is placed on the budget committee interest, the result can be a financially hamstrung review report, a narrow representative committee of experts because the budget committee wants an efficiency investigation, a lack of frank cooperation by the agency due to fear of financial slashing. The function of budgetary interest can best be achieved by special sub committees of that committee itself or composed of professional experts.

If over-emphasis is placed on the educational function, the result can be dissatisfaction by the agency due to neglect of any analytical thinking, and dissatisfaction by the committee members due to a sense of inadequacy. The function of education in itself can best be achieved by tours of the agencies, and need

not be confined to the small numbers of a review committee.

The basic function of the review committee is that of a cooperative review. If this is kept constantly in the fore, the secondary functions will fall into place.

The review committee cannot pose as the expert stating the right answers. Even surveys that take three or four years do not have that presumption. However because of being impartial and having studied a group of similar agencies in the community thereby the review committee can aid the agency through questions in seeing the wood from the trees. As stated the review committee function is to ask the right questions rather than state the right answers. This approach is logical for a committee that is part of a democratic voluntary organization. The autonomy of the member agencies of this federation should be respected. The central body should not dictate but rather suggest. The choice of these suggestions is the privilege of the member agencies. The effectiveness of the committee's recommendations therefore does not rest in the number adopted, but rather in the cooperative consideration that has been given. As long as the agencies are receptive to review and cooperate conscientiously in consideration with the committee, it is then carrying out an effective worthwhile contribution to the community.

The history of the federated planning movement has been studied briefly in the first chapter. The development of the Community Chest and the Council of Social Agencies has checked to some degree the chaotic scheme of social welfare services to a community. Because these two organizations comprise agencies

which are supported by voluntary community generosity, their functions can never be so calculated and systematized as to suffocate the spontaneous warm-hearted action. They must be constantly striving to achieve an equilibrium, yet always flexible to innovations. The very nature of a central planning body permits no longer justification for its existence when the status quo is satisfactory. It should be constantly prepared to examine itself and to consider progressive procedures.

The review committee has been successful in the Portland Council of Social Agencies. This procedure therefore warrants consideration by other central planning organizations.

Example of Review Committee Final Report

COUNCIL OF SOCIAL AGENCIES
240 Terminal Sales Building
Portland 5, Oregon

REPORT ON FAMILY AND CHILD WELFARE AGENCIES - 1948

VISITING TEACHER DEPARTMENT
49 S W Porter

General DescriptionFunction and Services (as submitted by the agency)

The Visiting Teacher works with children on a psychiatric casework basis who show in school relationships maladjustments in behavior, personality, learning and speech. Such children include those who do not get along well with fellow students, who fight, run away, do not tell the truth and are generally aggressive. Personality problems include youngsters who for various reasons are so maladjusted that they cannot use their maximum ability, either intellectually or socially, in school. They feel inferior, shy, picked upon, frightened or withdraw in a world of day dreams. Certain learning problems which occur in children of normal intelligence are basically learning difficulties or emotional problems. The Visiting Teacher does no teaching or tutoring but makes a social study of these children in order to ascertain in what areas the learning problem lies. If it is essentially emotional, the Visiting Teacher approaches this from a social casework point of view. If it is a teaching or physical problem, it is referred to the proper treatment sources. The function in speech cases is similar to that of learning difficulties. A study is made to determine the motivations of the difficulty and if speech therapy is indicated, the child is referred to one of the speech teachers attached to the schools.

While the emphasis of their work is on the problems which originate within the school, many youngsters are referred because of unwholesome home conditions. This function should properly be assumed by a private family agency, had we one in Portland. In the absence of this, they are compelled because of necessity to handle many of these family problems.

Any child attending the public school is eligible for service. Preference is given, however, to those children who are enrolled in the schools where the Visiting Teachers regularly work.

Referrals come from principals, teachers, parents, physicians and other school children. The Visiting Teachers are glad to cooperate with other community social agencies in handling problems of children in school if the cases are referred by the agency having the major responsibility.

Personnel (as submitted by the agency)

The staff includes the supervisor, a trained experienced psychiatric social worker, and nine staff members (one working 3/5th time). This represents an addition of three new staff members during the 1947-48 school year. One member returned from educational leave and another member is now attending a graduate school of social work. All staff have graduate social work training and case work experience. Two stenographers are employed, both serving the supervisor and the Visiting Teacher staff.

Statistical Report

		1946-1947		Total Opened	Closed	Carried over next year
Cases Carried Over Last Year	New	Reopened				
Visiting Teacher	92	300	44	436	336	100
Child Gui- dance Clinic	103	112	17	232	121	111
	<u>195</u>	<u>412</u>	<u>61</u>	<u>668</u>	<u>457</u>	<u>211</u>

The Visiting Teachers carry two types of cases - "Visiting Teacher" cases and "Child Guidance Clinic" cases. The "Visiting Teacher" cases were carried by the Visiting Teachers without referral to the Child Guidance Clinic. The "Child Guidance Clinic" cases were those referred to the Clinic by the Visiting Teacher for diagnosis and study.

Board of Directors

The School is the Board of Directors with the School District administrative staff as supervisory head.

Changes for 1948-49 as Proposed by the Agency

Three additional salaries for staff have been requested.

Comments and Recommendations

Comments

The Council commends:

1. The School administration for its provision for central office space files and secretarial staff for the Department and the principals for their continued attempt to make available rooms for private interviewing where facilities permit.
2. The School District for its continued efforts to improve the quality and quantity of staff to provide adequate service for all grade and high schools. Quality of staff has been improved by encouraging educational leave for additional graduate work.
3. The School District for employing well-trained and experienced social case workers in the Visiting Teacher Department.

Recommendations

The Council recommends:

1. That provision be made as soon as possible for a psychiatric consultant because of the serious nature of the problems of the children handled by the Visiting Teacher staff. This would be in part a continuation of the service formerly given by the Portland Child Guidance Clinic which was closed December 19, 1947.
2. That at least a portion of the Visiting Teachers be employed at their present monthly salary rate on an annual basis with one month's vacation as recommended by the Review Committee in 1945-46 to provide at least a minimum of service during summer vacation.
3. That an assistant supervisor be employed as early as possible to relieve the supervisor who also has administrative responsibilities. (Intensive supervision of six workers giving this type of service is consistent with good social agency policy.)

4. That the School District continue to work toward increasing the staff of social workers to a minimum of thirty Visiting Teachers as outlined in the Juvenile Protection Report adopted by the Executive Committee of the Council on May 17, 1946, and as recommended by the Review Committee in 1945-46. (At present the nine Visiting Teachers partially service thirty-two grade and high schools out of the total of 74.) In looking to the future, the Committee hopes that additional workers will mean materially increased service to high schools where problems are so emergent.
5. That staff members continue their present plan for assisting with the in-service training program of teachers to the end that teachers may become better informed on the mental hygiene approach to behavior and attain information as to how to use the services of the Visiting Teacher more adequately.
6. That as soon as the staff time permits, the Visiting Teachers be made available for more group education with parents through participation in various study groups and for individual consultation.

-- Signed by nine members of
REVIEW SUBCOMMITTEE III
of the COUNCIL OF SOCIAL AGENCIES

COUNCIL OF SOCIAL AGENCIES
240 Terminal Sales Building
Portland, Oregon

REPORT ON FAMILY AND CHILD WELFARE AGENCIES - 1949

GENERAL RECOMMENDATIONS

The Council recommends that:

1. A committee be appointed by the Family and Child Welfare Division to
 - (a) Plan for increasing counselling service to provide opportunity for all unmarried mothers to avail themselves of it.
 - (b) Plan with agencies giving service to unmarried mothers a united publicity program to acquaint the community with services now available.
 - (c) Study means of decreasing the number of independent placements in line with the statement of objectives of the Adoption Legislation Committee.
2. The Family and Child Welfare Division call together a committee composed of representatives of the Portland Office of Oregon State Employment Service and the voluntary agencies doing employment counselling and placement to effect greater coordination of the work of all.
3. The Family and Child Welfare Division study with the agencies the need for and provision of homemaker service, possibly through Multnomah County Public Welfare Commission.
4. Consideration be given to a study and evaluation at the state level of the present policy and practice of public support of private agency services.
5. The Community Chest study the means of setting up a joint plan for providing scholarships to social workers now employed in voluntary agencies, thus insuring an increased number of better-qualified staff in this community.
6. Special study be given to the means for providing much-needed in-patient psychiatric care for emotionally disturbed children.
7. All agencies giving casework service to families and children make a special effort to consult with Information Service of the Council of Social Agencies regarding services now available in the community and to present the unmet needs so that such information will be available as a basis for future planning.

Signed by the four members
of the

OVER-ALL REVIEW COMMITTEE of the COUNCIL OF SOCIAL AGENCIES

11/ C.

MEMBER AGENCIES OF THE COUNCIL OF SOCIAL AGENCIES

Community Chest Agencies

Family & Child Welfare and
Community Organization

Albertina Kerr Homes
Boys' and Girls' Aid Society
Catholic Charities
Children's Farm Home
Community Child Guidance Clinic
Federated Jewish Societies
Fruit & Flower Day Nursery
Legal Aid Committee
Mental Health Assn. of Oregon
Oregon Prison Association
Pisgah Home Colony
Portland Americanization Council
Portland Hearing Society
Salvation Army
Travelers Aid Society
Urban League of Portland
Visiting Nurse Association
Volunteers of America
Waverly Baby Home
Woman's Convalescent Home
Women's Protective Division

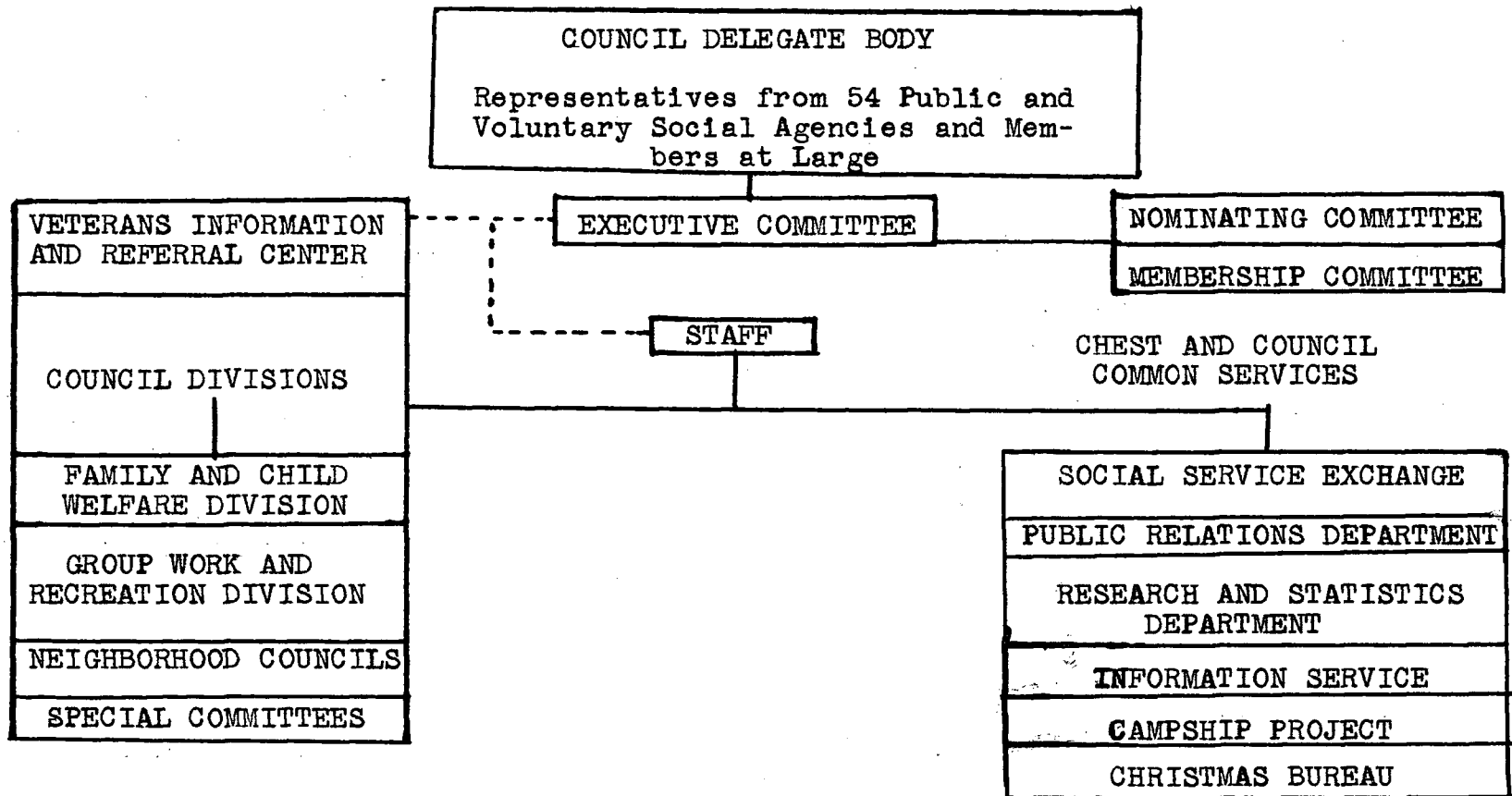
Group Work & Recreation Division

Boy Scouts of America
Camp Fire Girls, Inc.
Girl Scouts of United States
of America
Jewish Community Centre
Linnton Community Centre
Neighborhood House
Portland City Bureau of
Parks and Recreation
Young Men's Christian
Association
Young Women's Christian
Association

Other Agencies

American Legion Auxiliary
American Red Cross
Farm Security Administration
Goodwill Industries of Oregon
Indigent Soldiers Fund
Junior League of Portland
Lutheran Welfare Association
Multnomah County Council of Parents and Teachers
Multnomah County Court of Domestic Relations
Multnomah County Health Department
Multnomah County Public Health Association
Multnomah County Public Welfare Commission
Oregon Chapter, Society for Crippled Children
and Adults, Inc.
Oregon Conference of Social Work, Portland District
Oregon State Board of Health
Oregon State Employment Service
Oregon State Nurses' Association
Oregon State Public Welfare Commission
Oregon Tuberculosis and Health Association
Portland City Bureau of Health
Portland Council of Churches
Portland Council of Parents and Teachers
Portland Housing Authority
University of Oregon Medical School Hospitals & Clinics
Veterans Administration Hospital, Marquam Hill

COUNCIL OF SOCIAL AGENCIES
PORTLAND AND MULTNOMAH COUNTY



P O R T L A N D C O M M U N I T Y C H E S T

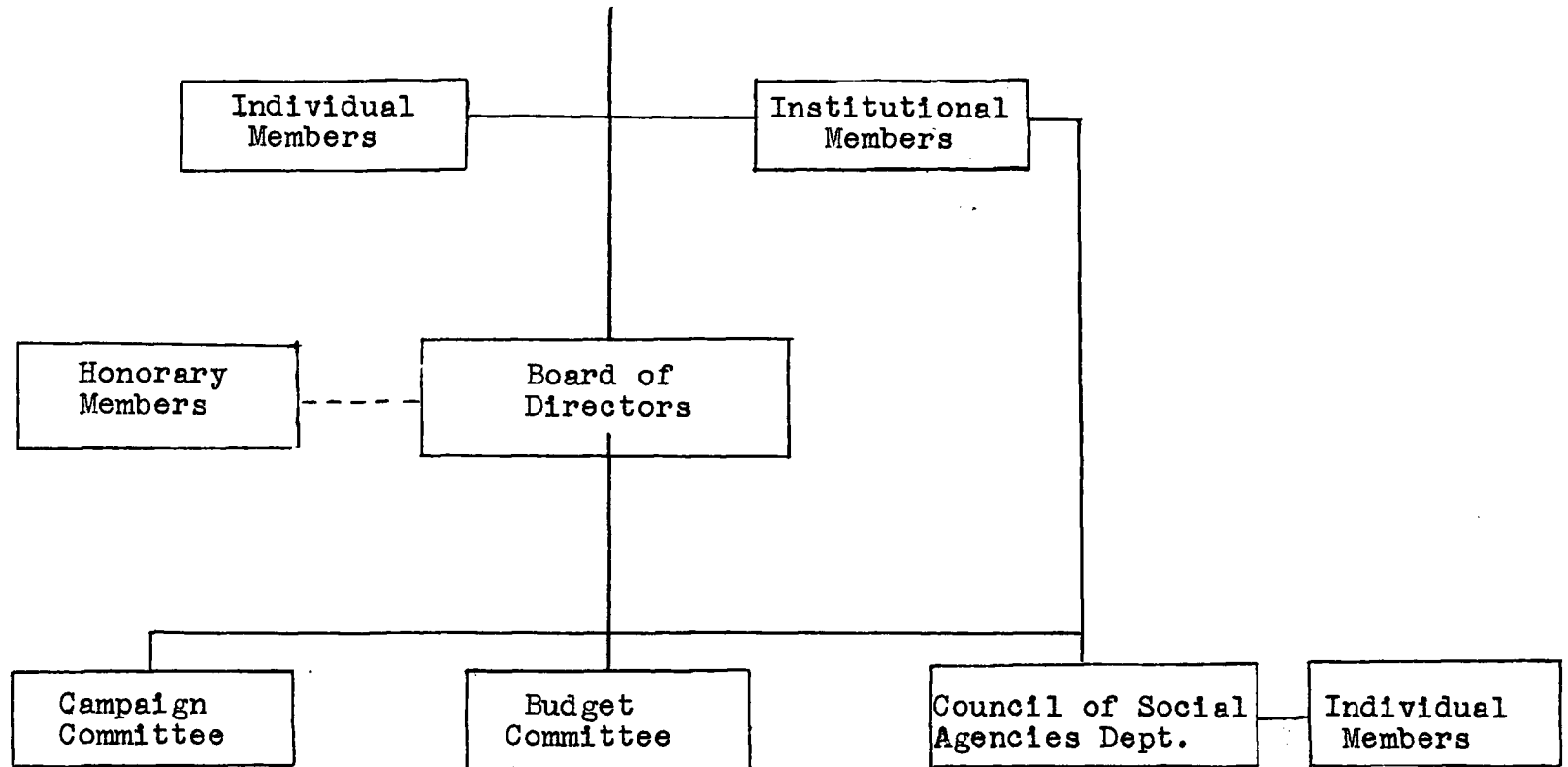


Chart E

BIBLIOGRAPHY

General References

Books

- Atwater, Pierce, Problems of Administration in Social Work, The University of Minnesota Press, Minneapolis, 1940.
- Colcord, Joanna C., Your Community, Russell Sage Foundation, New York, 1947.
- King, Clarence, Organizing for Community Action, Harper and Brothers, New York, 1948.
- McMillen, Ardee Wayne, Community Organization for Social Welfare, University of Chicago Press, Chicago, 1944.

Specific References

Articles, Bulletins and Pamphlets

- Berstein, Marvin H., "Limitations of the Administrative Expert", Social Work Year Book, 1947.
- Cassidy, Harry M., "The Dilemma of the Chests", Canadian Welfare Journal, November 1948.
- Community Chests and Councils of America Incorporated, "Let's Make a Study", No. 1 Bulletin 114-A, New York, 1949.
- Feary, Amelia, "Origins of Family Social Work in Portland, Oregon", The Social Welfare Reporter, February 1941.
- Tynan, Mary A. and Walker, Elsie H., "The Social Workers' Club of Portland", The Social Welfare Reporter, April 1947.
- The Woman's Foundation, The Road to Community Re-organization, New York, 1945.

Reports

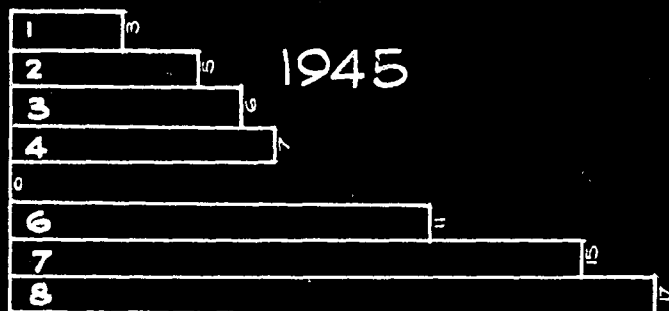
Annual Reports of the Community Chest of Portland for the years 1929-49.

Annual Reports of the Council of Social Agencies of Portland for the years 1928-49.

Much information was derived from minutes of the committees of the Portland Council of Social Agencies during 1928-49.

Source for the study was also gained from conferences with the staff of the Portland Community Chest and Council, and from personal participation on two review committees in 1949.

Bar Diagram Showing Brakedown and Number of Recommendations of the Review Committee



~LEGEND~

1. Volunteers.
2. Continuation of Present Services.
3. Boards.
4. Physical Plant & Equipment.
5. Fees.
6. Inter-Agency & Council Co-operation.
7. Extending & Changing Services & Functions.
8. Personnel.

 ... Number of Recommendations

