

GOVERNMENTS AND VOLUNTARY SECTOR WELFARE: HISTORIANS' PERSPECTIVES

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Abstract

This paper examines recent themes in the history of welfare as they apply to the relationship between government and the voluntary or non-profit sector. These include a shift from a focus on the welfare state to a "mixed economy" or "moving frontier" of welfare, and the emergence of a long-term view that shows a centuries-old contestation between public and private provision for social need. The rehabilitation of past philanthropy has helped to reinforce the profile and legitimacy of the voluntary sector in the present, while recent attention to the actual encounters between providers and recipients of welfare has complicated earlier social control theories. Gender studies have illustrated the respective roles of men and women in the different welfare sectors, the voluntary sector providing a sympathetic space in which women, in particular, have attempted to exercise social power. Typologies derived from internationally comparative studies of the non-profit sector have tended to emphasise the complementary nature of its relationship with governments. This paper suggests some distinctive elements in New Zealand's history which shaped such interactions in the past, and which now impose constraints, as well as suggesting pathways for the future.

INTRODUCTION

In time of rapid administrative change, history and social policy may connect only fleetingly. "The past" tends to be seen as something to disown, critique or move on from. This may especially be the case where change takes on a dynamic of its own, individuals and groups having a vested interest in initiating a new order, but not in appraising and reflecting upon its long-term consequences. History in the form of reflection on the past may be seen as a distraction, an impediment to action in the face of immediate pressures. Alternatively, the past may take on the glow of a "golden age".

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Here myths about a more virtuous (and selectively chosen) past may be used to criticise or justify subsequent developments.

Despite its being ignored or misused, historians would argue that their discipline does have a place to play in the making of social policy. Many historical debates have abiding echoes and the solutions of the present may not be as original as we would like to think. A look at the historical record reminds us that discredited ideologies and practices were often implemented by people as well meaning, as convinced of their rightness, and as appalled by their predecessors' actions, as policy makers in the present. History provides, above all, a corrective to assumptions about the easy answer and a basis for better understanding of current dilemmas.

This paper reviews historical perspectives on one particular aspect of social policy: the relationship between government and voluntary sector welfare. This seems timely, given a plethora of recent publications about the so-called "contract culture" which became entrenched in the social services over the last decade and a half. The recent report of the Community and Voluntary Sector Working Party (2001:145) included in its "Phase Two work programme" a call for historical research in the area, and although my focus is the more structured side of such activity, it aims to provide a starting point for further, more empirical, research.

I use the term "voluntary sector" in recognition of its long, though mixed, historical provenance. There are other, more recent, contenders for the cluster of attributes evoked by the term; among them the "third sector", as opposed to the "first" and "second" sectors – the market and the state. (A fourth, "household" sector, is sometimes identified as well.) In Britain, the "non-statutory" sector is the competing terminology, while "non-profit" is more favoured in the United States. None of these terms is unproblematic, and each carries an ideological imbalance of one or another kind (Kuhle and Selle 1992:6). The further one goes back in history, the more problematic all these terms become, including the notion of "sectors", for they assume a demarcation of public and private domains, and an ideological, political and legal infrastructure which differs from that of Western societies in the past (Hall 1994:4-5) and from non-Western societies in the present. Internationally, as Lester Salamon and Helmut Anheier point out, notions of "voluntary" or "non-profit" activity are "culture-bound and dependent on different legal systems" and incorporate "a wild assortment of institutional types that varies greatly in basic composition from place to place" (Salamon and Anheier 1997:495).

Here the term "voluntary sector" will be used for national and local personal helping or relief organisations, which are non-profit-distributing (though they may make profits), and voluntary in the sense that involvement in their activity is not forced or mandatory. These may range from highly structured nationally organised bodies to

loosely organised community associations, though mutual aid associations such as friendly societies have had a somewhat different historical trajectory.

FROM WELFARE STATE TO WELFARE SECTORS

A number of themes have emerged in welfare historiography in recent years. Until the 1970s, welfare history was very much about the "rise of the welfare state", with a focus on a growing collective humanitarianism and citizen entitlement to statutory benefits (Bruce 1968, Fraser 1973). Often written with overtones of inevitability and progress, this approach implicitly and explicitly constructed the welfare state as a response to voluntary sector failure. Where historians ventured into international comparisons, they drew on social science models by Wilensky and Lebeaux (1965), Titmuss (1974), Esping Anderson (1990) and others which paid relatively little attention to the role of voluntary welfare (Kuhnle and Selle 1992:12-19).

However, historians are not insulated from contemporary social and political shifts and, as the so-called "crisis of the welfare state" entered public discourse, their analyses either became less laudatory, or explicitly sought to defend the welfare state from a "New Right" attack (Thane 1982). At the very least they were forced to write about the welfare state in terms which questioned its inevitability. The term "classic welfare state" began to be used of the 1940s, 1950s and 1960s in particular, and the welfare state was increasingly depicted as part of a distinctive period of history – as an institution which was complex, contradictory and by no means as total in its reach as had previously been assumed. As a corollary of this, and mirroring its late 20th century expansion, the voluntary sector has acquired a new interest for historians. In place of analyses of the state, notions of a "mixed economy of welfare", "welfare pluralism" and welfare "sectors" have taken hold. The balance of the different sectors is seen as shifting over time, and not inevitably in the direction of state predominance. In one particularly influential article, British historian Roderick Findlayson wrote of a "moving frontier" of welfare between voluntarism and the state over the 20th century; an "ideological front" influenced by war and want, but constantly being reassessed and renegotiated (Findlayson 1990).

In New Zealand there have been some fine studies completed in recent years of social policy sections of government (McClure 1998, Dalley 1998, Bassett 1998, Dow 1995). For the most part these have touched only in passing on the relationship between government and the voluntary sector in different welfare environments, though they do give an indication of the government's expanding regulatory role. There are relatively few "lifecycle" studies of voluntary organisations. Those which do exist focus largely on national societies, are of varying quality and, understandably, do not foreground relations with government. Analyses of the relationship by social scientists sometimes contain a historical section as a kind of "introductory overture" to their real

performance piece: the recent past and the emergence of the so-called “contract culture” (Social Advisory Council 1986, Ellis 1994, Nowland-Foreman 1995).

A LONGER-TERM VIEW

While Findlayson wrote about this “moving frontier” in relation to the 20th century, many historians urge an even longer-term view of welfare. Family history and studies of the Poor Law in Britain have generated an argument that “the history of provision for the poor over the past three centuries or more has to be seen as one of constant shifts in relationships and the balance of provision among central and local government, charity, kin, and informal neighbourhood support” (Thane 1989:96). Such studies have tended to focus on the elderly as a consistently vulnerable group over time, but they also have general implications for the present: they suggest a cyclical view of welfare is more appropriate than one which focuses only on the welfare state and they show a centuries-long contestation about the balance between public and private welfare.

David Thomson, a specialist in British as well as New Zealand history, is the main exponent of this view in New Zealand. His work on the elderly and my earlier study of the charitable aid system suggest that the cyclical nature of welfare arrangements and the intellectual baggage of an immigrant population are critical to understanding the relationship between public and voluntary forms of welfare in 19th century New Zealand (Thomson 1998b, Tennant 1989). The argument is that organised migration to New Zealand came in the midst of a pendulum swing against public welfare in England. The 1834 report of the British Poor Law Commissioners recommended a tightening up of Poor Law provision for the able-bodied, a more meagre approach, which was later extended even to the elderly poor.

The ideals behind this cyclical change in British welfare took more extreme form in colonial New Zealand, where individual effort and family responsibility were lauded even above voluntary charity. Many settlers rejected both public welfare in the form of a poor law and the perceived condescension of philanthropy. Nonetheless, as Thomson also acknowledges, this first version of New Zealand as an anti-welfare experiment was found wanting by the 1880s and 1890s (Thomson 1998b:161). State activism, already a feature of many policy arenas, was soon extended to welfare and, through its old-age pension and labour policies, New Zealand started to be represented as a “social laboratory” of a different kind. Another pendulum swing began. Our own debates and working parties and our current conceptualisations of the state and the voluntary sector may represent but another turn in a very long and contested process.

THE REHABILITATION OF PHILANTHROPY

A third historical theme is the rehabilitation of past philanthropy and charitable endeavour, a trend that helps to reinforce the profile and legitimacy of the voluntary sector in the present. From earlier analyses that saw voluntary charity as class-ridden, largely to be interpreted in terms of social control, insensitive pieties and do-gooding ladies (Summers 1979), a more complex and generally more positive view has emerged. This acknowledges altruism and reciprocity as well as social control; intra-class as well as across-class transfers.

British historian Frank Prochaska has been a major influence here. While acknowledging calculation and social tension in charitable causes, he writes, "It is suggestive to think of the history of philanthropy broadly as the history of kindness" (Prochaska 1990:360). From this perspective, voluntary welfare is grounded in fundamental community impulses and customs, its diversity and even its apparent muddle making it a "nursery school of democracy" (ibid.:392). Prochaska sees the current resurgence of interest in philanthropy and community action in Britain as a direct and positive legacy of charity past; of those philanthropists "rich or poor, misguided or wise, whose works radiated from the home into the wider world" (ibid.:393). Other historians continue to place more emphasis than Prochaska on the status attributed to charitable acts at different times and in different places, even if they now regard "social control" theories of welfare as assuming a higher level of rational intent and efficacy of outcome than is warranted by historical case studies (Kidd 1996).

In New Zealand, earlier charitable activity may have been less in need of rehabilitation, partly because it had a weaker purchase in a colonial society and partly because the class differentials fundamental to images of charitable paternalism and condescension were less clear-cut (Tennant 2000). Nonetheless, the altruistic view of past philanthropy has been used recently to condemn the "dispassionate and statist-instrumental approach" which supposedly supplanted it (Gregg 1999:5). In publications by the Business Round Table and the Centre for Independent Studies, voluntary charity in the past is endowed with a sense of mutual respect, honour and solidarity with others, and a capacity for face-to-face relationships denied the "impersonal" welfare state (Green 1996: 118-20). In the United States one of the first acts of the newly installed President George W. Bush was to set up the White House Office of Faith-Based and Community Initiatives, on the basis that such ventures are better placed than the state to respond not only to material need but to change hearts and minds (www.whitehouse.gov:2001).

In each case, the moral superiority of the voluntary sector is unquestioned. However, by facilitating the transfer of tax revenues to faith-based and community groups, the Bush initiative essentially acknowledged the failure of the free market to solve social problems. In New Zealand the Business Round Table has been strongly opposed to

voluntary sector reliance on government grants, urging a return to an earlier, more pristine and “independent” position (Green 1996, Kerr 1999). (This independence was not always apparent to earlier social commentators: Duncan MacGregor, the late 19th century Inspector-General of Hospitals and Charitable Institutions, was infuriated by the extent to which voluntary bodies sought government support. Noting that even the churches were “infected” by the expectation of subsidy for their welfare work, he fulminated against “this devil of vicarious charity masquerading as one of the Christian graces” (MacGregor 1898:7).)

WELFARE ENCOUNTERS AND THE IMPLEMENTATION OF POLICY

The complicating, if not the undermining, of social control theories has been assisted by another theme in the recent history of welfare. This involves a focus on the actual encounter between providers and recipients of social services and sensitivity to the ground-level implementation of policy, not simply its formulation. Drawing upon Foucaultian notions of the dispersed nature of power, this approach is less likely to see welfare beneficiaries as passive and helpless, preferring to acknowledge them as actors in the welfare exchange who sometimes used charities in quite strategic ways (Jones 1996, Van Leeuwen 1994). In part, this was a response to the social history of the 1970s and 1980s, which sought to foreground the experience of those on the bottom of the social heap, and to give them voice.

More recently this approach has been informed by anthropological notions of reciprocity in social relations and by cultural studies approaches which regard both the act of giving and the act of receiving welfare as “a cultural performance to be decoded”(Kidd 1996:191). The “theatre” of charity saw both donors and recipients acting out roles expected of them, an activity at which the latter could become quite adept (Kidd 1996:187). Historical case materials and annual reports of charities give insights into the scripts being followed in these encounters, and they were clearly written with particular audiences in mind. Past charity records frequently read as melodrama or morality plays. The modern scripts inherent in mission statements, annual reports and contracts with government equally involve performances, sometimes with voluntary sector organisers as the supplicants – though (to extend the metaphor a little too far, perhaps) there may be a fair amount of extemporising by all players in the actual show. To an historian, the point at which “Treaty Principles” and statements about commitments to Māori enter such documents is fascinating, as is the juxtaposition, very often, of an older language of charity and modern management idiom (Wood 2000).

Given the particular claims of the voluntary sector, past and present, to superior performance in face-to-face encounters with “the needy” (of the past) and “clients” (of today), this perspective is important to any assessment of voluntary organisations and

their standing in relation to government services. The Privacy Act and increasing inaccessibility (or destruction) of welfare case materials is making the historian's task of reviewing such performances more difficult in the New Zealand context. Nonetheless, on the government side, some recent studies have suggested that the responses of state social workers in areas such as Child Welfare, Māori Affairs and Social Security may have been more flexible, humane and culturally sensitive than critiques of the 1980s acknowledged (Dalley 1998, Labrum 2000). They also demonstrate, incidentally, that government agencies, like the voluntary sector, are complex entities, not well served by analyses which assume that "the state" is an undifferentiated, monolithic edifice.

GENDER AND WELFARE

The role of gender in welfare is a fifth historiographical theme that impinges on the relationship between government and voluntary sector welfare. Historians first focused on women's role as consumers rather than producers of welfare, but a number of influential studies in the late 1980s and early 1990s elaborated on women's role in shaping welfare states. Much of this has involved a conceptualisation of welfare states as either "paternalist" and governed by concerns to protect an adult male labour force, or "maternalist" and focused on support for mothers and children, though there is debate about which forces prevailed in different countries (Koven and Michel 1990, Bock and Thane 1991). New Zealand and Australia have been characterised as "workers' welfare states" where women in their family role were secondary beneficiaries of centralised wage-fixing systems and a basic minimum wage to workers (Castles 1985).

The lens has shifted more recently to the voluntary sector and women's role in the personal social services, to which voluntary organisations have historically laid strong claim. Some especially important work has been done in this context by British historians such as Jane Lewis, who examined the value placed on the personal social services as opposed to the delivery of statutory benefits and social administration. The former are often seen as a female-dominated domain; the latter as largely masculinised over the 20th century. As long as welfare delivery involved local government and voluntary effort, Lewis argues, women had opportunity for influence in Britain. But as welfare became more centralised, the personal social services were marginalised and women's influence on policy reduced (Lewis 1996b). Most recently, she suggests, market principles and the "macho-management" styles of the late 1980s and 1990s have further undermined women's caring work in Britain, at least.

Women's history provides a sympathetic context for the notion of a "mixed economy of welfare", for it has long posed challenges to conceptual boundaries. Koven and Michel suggest that women constantly operated in the "borderlands" of political

structures, using their authority as mothers to challenge “constructed boundaries between public and private, women and men, state and civil society” (Koven and Michel 1990:1079-1096). The voluntary sector was first seen as a site where women could apply the skills and moral force developed within the home and family to a broader community context. The “extended housekeeping” argument was later used to argue for a voice in state policy. In their personal lives women have often moved from a caring role in the family to an unpaid or paid role in voluntary organisations or government employment: as individuals they have *lived* the notions of permeability of sectors and moving frontiers.

Historically, women’s availability for unpaid work has been critical to the fortunes of the voluntary welfare sector (Vicinus 1985). Demography as well as ideology may have restricted benevolent activity in 19th century New Zealand, where women were a minority and where a high proportion of adult women were married and involved in child-rearing. The lack of the “spinster culture” which sustained so much female charity in Britain restricted the voluntary workforce in this country. Rather than the personal social services becoming marginalised in the early 20th century, as Lewis (1996a) argues for Britain, it may be hypothesised that the personal social services were never established as a strong and viable female domain in the colonial welfare economy (Tennant 1993, Tennant 2000). The early centralisation of public social services and lesser role of local bodies in New Zealand’s social services further restricted female effort, though a number of women’s organisations emerged to lobby government in the direct of state activism, especially on “maternalist” issues (Else 1993).

In New Zealand and elsewhere the involvement of men *as men* in welfare services has been little explored by historians. Many have pointed out that men dominated the management and organisation of 19th century charity and Lewis’s argument about the British welfare state sees the statutory sector and social administration as a largely male domain over the 20th century (Lewis 1996b). Peter Shapely has examined charity leaders in the city of Manchester over the 19th century, showing how a charitable profile enabled “the Manchester Man” to obtain symbolic power and legitimate domination (Shapely 1998). In New Zealand, it appears that philanthropy was more of an “optional extra” for those seeking social recognition and political power. A reputation for charity never acquired the functional value it had, for a period of time at least, in the British context. Needing more study here are the men of lesser wealth and status whose involvement in welfare was at the “hands on” level, in city missions, prisoners aid societies and youth groups, and male public servants in the welfare sector. To some extent they, too, crossed sectoral boundaries.

In New Zealand, as in Britain, men dominated statutory welfare and social administration, but government agencies also used the employees of voluntary organisations to carry out state functions as probation officers and official visitors, for

example. Many 20th century public servants held positions on the committees of voluntary organisations and gave other, unofficial, forms of support to these bodies. It is a reminder that the relationship between voluntary organisations and government has never simply been a matter of financial transfers: that personnel and other exchanges of services also featured prominently.² There is space for an approach that uses collective biographies of male and female welfare workers over time to chart such interactions and movement across welfare boundaries.

TYPOGRAPHIES AND GENERALISATIONS

While the concept of a "mixed economy of welfare" has been most explicitly elaborated in British historiography, some of the key typographies and theoretical constructions of the non-profit-government relationship have come from the United States, most especially from the Johns Hopkins Comparative Nonprofit Sector Project. Voluntary organisations have been characterised as vanguard organisations, as advocates, as value guardians or as service providers, some filling more than one role, and some changing emphasis as they develop (Kramer 1987:242). However, no uniformly acceptable definitions have emerged which would encompass the full range of voluntary effort, from large-scale, service-oriented bureaucracies to small-scale, grass-roots activity (Kuhnle and Selle 1992:35)

In the United States there has previously been a tendency to see relations between voluntary sector and government within a paradigm of conflict (Salamon 1998). This assumes that an increase in government welfare activity severely damages both the scope and the integrity of the voluntary sector (if funds are transferred from government to voluntary bodies, for example), though research strategies involving international comparisons and historical studies have suggested a more complex relationship (Salamon 1998). This is variously characterised as supplementary, complementary or adversarial and, some suggest, two or even three of these relationships may be manifested simultaneously (Young 1998).

Those writing from an internationally comparative perspective have tended to emphasise the complementary nature of state-voluntary sector relationships, some going as far as to argue that voluntary organisations are part and parcel of the state. Kuhnle and Selle suggest that whether one looks at the least-developed welfare states, such as the United States, or some of the most state-oriented welfare regimes in Scandinavian countries, "the state cannot be looked upon as an agent which has

² Conclusions on the New Zealand situation draw on current research using the archives of social service departments of government and of selected voluntary organisations. As emphasised elsewhere in this article, the importance of such personal interactions is striking in the New Zealand context.

actively destroyed and weakened alternative social security nets such as voluntary organizations" (Kuhnle and Selle 1992:2). For them the question is rather one of *what patterns* of cooperation existed in different national contexts over time.

Attempts to derive cross-national comparisons and models from detailed empirical local histories of voluntary activity have been only partially successful, but point to greater complexity than earlier, predominantly economic models implied. Advocating a "social origins" approach, Salamon and Anheier (1998) conclude that:

The nonprofit sector [is not] an isolated phenomenon floating freely in social space, but...an integral part of a social system whose role and scale are a by-product of a complex set of historical forces. (p.245)

The relationship between the state and the voluntary or non-profit sector is seen as influenced by the type of regulatory regime in existence, for example by the degree of decentralisation of the welfare states as they developed, by federalism and the role of local authorities, and the religio-political configuration of societies. (The close historical role of the Catholic Church in some European countries is an issue here, sometimes limiting the development of secular organisations.) A distinction has been drawn between countries with a common law system, and those governed by civil law. Where a codified civil law exists, it is suggested, the definition of organisations providing a permissible public good are likely to be tightly designated; in common law countries the field is more open and an evolving case law defines what the community perceives over time as a "public good" (Salamon and Anheier 1997:498-9).

Factors Shaping the Relationship Between the New Zealand Government and the Voluntary Sector

While a start has been made on analysing the voluntary sector in countries beyond Europe and the United States, Australasia has not featured greatly in recent collections. This is not the place for a survey of the voluntary sector in New Zealand, but certain key factors may be seen as shaping the relationship between government and voluntary welfare here. First, New Zealand was a settler colony, influenced by British common law legal traditions and models of voluntary activity, though not simply mirroring those models. Future research will need to consider both continuities with Britain and differences from the British pattern. As suggested earlier, the time at which organised settlement began in New Zealand was important, coinciding with a pendulum swing against public welfare, yet organised voluntary endeavour also had more limited purchase than in Britain.

A second factor is this country's centralised system of government, which enabled welfare policies to be implemented in a less contested way than in many other

countries and, I would suggest, promoted an early complementarity of effort. State transfers to benevolent societies were in place by the 1860s, governments showing particular favour in the 19th century to activities promising moral reform and training. The 1885 Hospitals and Charitable Institutions Act gave a statutory basis to such arrangements, guaranteeing a subsidy of one pound (later 24 shillings) to voluntary organisations which incorporated under the Act (Tennant 1989).

A third, and associated, factor is New Zealand's small size, which enhanced the personal element in such relationships. Lifecycle studies of organisations will help illuminate the detail of such interactions, as well as the fortunes of organisations once deprived of decisive internal and external promoters and key sponsors within government.

Fourth is the presence of a strong and increasingly vocal indigenous population which cut across many of the above elements, especially since the 1970s – though earlier silences about Māori within both voluntary and government social service agencies are significant in themselves. The 19th century rejection of public welfare which David Thomson identified (Thomson 1998b), the lauding of self-help and initiative over public welfare, and even over voluntary welfare, were predicated on Māori land coming cheaply onto the market. In addition, as international studies have suggested for non-Western countries, the very concept of "volunteerism" beyond the family group becomes complicated in different cultural contexts (Ilchman et al. 1998, Salamon and Anheier 1998). Submissions made to the 2001 Working Party into Community and Voluntary Sector Welfare implied that the whole concept of "voluntary work" may not sit comfortably with Māori culture and values, particularly where it involves notions of working for "others" and a "choice" about doing this (Community and Voluntary Sector Working Party 2001:20). History is fundamental here, for a shift in resources to iwi and Māori-run services grew, in part, from a sense of historical injustice. In this context Māori groups are not simply competitors for government support, but Treaty partners whose relationship with government is complicated by broader political and historical issues (ibid.:viii).

CONCLUSIONS

The very definition of a "voluntary" organisation is currently being renegotiated. Distinctions currently being asserted between large, nationally and bureaucratically organised bodies and small-scale, grassroots (or flaxroots) community organisations may not, however, stand up. Today's "grassroots" organisation may be tomorrow's bureaucracy, or – given that ephemerality is more historically typical of voluntary organisations – it may fade into future irrelevance, its task completed or superseded.

New Zealand's "welfare frontier", like Britain's, has been constantly renegotiated. Changing social, moral and political environments spawned slightly different welfare

arrangements, though certain voluntary organisations held onto favoured status with notable tenacity. As the relationship between government and the voluntary welfare sector comes under scrutiny in the 21st century we will see that it results from a combination of minute personal interactions and complex historical forces, some unique to this country and some more general. The personal element raises questions about the whole notion of welfare “sectors” and, at the very least, shows the permeability of welfare boundaries over time. Here, as elsewhere, the patterns of the past are likely to impose constraints as well as suggesting possibilities for the present and future.

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