Collaborative welfare practices: evidence beyond the storytelling

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ABSTRACT

New changes are going on in the Italian social welfare. They cover a multitude of grass root initiatives seeking new ways to respond to welfare needs, quality of life, inclusion. Collaboration and mutual aid has long been existed in social welfare. So what is new? Part of a broader movement of collaborative economy, or sharing economy, these projects express new characters in organizational and professional terms, and in the way they relate to public policies. But there is a limited knowledge on all these issues, on the strengths and weaknesses of collaborative practices. We must go over the widespread storytelling, the narratives of the "good wills" and figure out what really works and under which conditions.

This paper presents the main findings of a research project carried out by *Istituto per la Ricerca Sociale* of Milan with several partners of the third sector, within the Lombardy Region. The main focus of the study has been to map and explain what "works" within what we call "collaborative welfare" practices. Namely: peer to peer help and counseling between families, digital platforms to enable collaboration, care arrangements for child and frail older people, urban centers as places where activation may develop, shared caregiving also in paid terms.

We carried out a qualitative analysis of over 60 projects through interviews, data collection, and review of documentation. We have focused on different variables: who is involved and engaged, and which kind of interests move people toward collaboration and cooperation. These practices show different core meanings from traditional services: no more "produce" but connect, no more "answer" but building possibilities, no longer contain the evils of a fragile society, but to facilitate, enable, mediate. Many of these experiences define spaces of extreme interest that bring out unexpressed needs, breaking the social worker / user dualism, addressing issues and activities that go beyond traditional categories and prefigure innovations in the social welfare.

INTRODUCTION

A quiet revolution is going on through social welfare. It deals with a variety of grass root initiatives that seek new ways to cope to the needs of well-being, quality of life and inclusion. The idea is that bringing together common interests and needs can produce more effective and powerful initiatives than the sum of single actions: because they produce new bonds, trust, cohesion, and because individual well-being and collective well-being are interconnected.

New forms of collective action and solidarity mutualism prefigure changes in the social and health care system. This paper focuses on them.

Part of a wider collaborative economy, or sharing economy, the idea that moves these experiences is that the valorization of the resources of families and the territory, in a community welfare perspective, their connection with the support of different organized parties, can reduce the fragility and increase the well-being of local communities. Activation, cooperation, participation, co-production, sharing, trust, cohesion are the main keywords.

Regional and local authorities, single or coordinated municipalities, as well as grant making foundations, and even for profit companies are today eager to give support, to sustain projects which go in the direction to build community welfare networks and to strengthen bonds at the local level.

THE REASONS OF AN ATTENTION

What are the reasons for this growing interest and activity? Social and health services cover in Italy no more than 20 per cent of frail older people. In the case of disabled young people and adults we do not exceed one-third of the potential demand. The question is easy: how all the others cope with their needs? How to extend the public welfare response? Hardly through an increase of resources: it is not realistic to expect them to increase over the years to come. Not in a relevant way, not for everyone.

Many of the social services we have built over the years do not keep up with the changes. Some examples: home care services for seniors provided by municipalities have become niche and marginal services; youth day centers are places that have been emptied of an interest that goes elsewhere; therapeutic communities have been experiencing a phase of crisis and rethinking for many years; nursing homes for elderly people host, in one case out of five (Lombardy Region data), users that should be by more properly cared by different residential facilities: smaller, more open and less expensive.

We can adapt what does exist, and this is already done. We can claim more resources for social welfare, and this too is already done. But we must above all think of new ways of building care, towards a network of activating help: activating people and activating local communities.

The term "community welfare" is not new but has found new impetus, with the idea that new alliances between institutions, families, the third sector, the market need to be made, enhancing the individual's ability and initiative. This has to complement services facing heavy fragility, discrimination, which must continue to exist as a means of protecting individual rights, basic levels of assistance.

The idea is that, in order to cover a larger area of needy persons, not only more resources are needed, but above all we need to move toward a different way to cope to the needy. To do so an increasing space for this set of collaborative experiences is needed, as they eventually lead to change the very format of more consolidate social welfare services. That's why it's important to create bridges from small to big, get out of endless experiments, value mature experiences, get out of prototypes, and help grow what really works. From bottom up, bridges and connections are often lacking in this country.

NEARBY, OVERLAPPING, BUT DIFFERENT

The field of investigation is located in an area which is close to other fields. These are partly overlapping with collaborative welfare. In particular, collaborative welfare and the share economy have in common the focus on exchange and sharing consumption, rather than on private and individual property. But with important differences.

a. **the sharing economy** differs from the collaborative welfare for at least two reasons: firstly, because it is based on digital platforms; secondly because it is usually based on "disintermediate" transactions. In our case, both of these elements, as we shall see, are not a condition for collaboration;

b. **volunteering and voluntary action** can often be found in collaborative welfare projects. Voluntary action is a much more well-known and studied field of activity, which we found in many cases we analyzed. However, we have decided to focus on experiences with a minimum of professional component to understand what market developments they may have;

c. **co-production of services**, as the process of involving citizens in the production of welfare services, is another adjoining field, with evident converging elements with collaborative welfare. By co-production I mean the "production of public services in an equal and mutual relationship between professionals, users, their families and their neighbors" (according to the definition of *New Economics Foundation*). In this sense, and this is the difference, co-production remains within the traditional social worker-user relation, which collaborative welfare, especially in his peer-to-peer version, tends to overcome.

The following figure shows the field of analysis we have defined it.

Nearby and partially overlapping
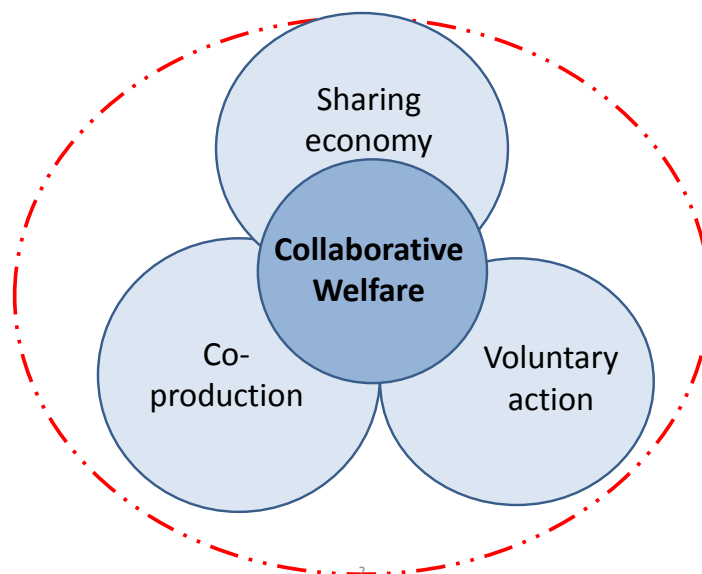
A point can be made on disintermediation. The sharing economy is made of peer-to-peer exchanges, but more often of on-demand services (Stringa, 2017), and this mode is partially found in the experiences we have analyzed in this project. There is a substantially different relational configuration between traditional services, peer collaboration and on-demand services, which we summarize as follows. The study has considered these different roles, as they are often intermingled on the empirical level.

- Traditional Welfare: Social worker ⟷ User
- Collaborative Welfare: Citizen ⟷ Citizen
- Welfare "On demand":   Provider ⟷ Client

SO, WHAT ARE WE TALKING ABOUT?

We can call it "collaborative welfare": it leverages the resources - money, time, care, expertise - of families and communities and puts them in dialogue, producing something more than the sum of individual actions. More concretely, we are talking about initiatives aimed at fostering autonomy and inclusion. We talk about socializing individual needs, aggregating demand to converge on a new offer, building connections, through mutual aid processes, responding to shared needs.

Projects are sometimes promoted and managed by civil society, sometimes by public institutions, sometimes through partnerships between the public and the third sector. There are different types of collaboration. There is a "passive" type of partnership that does not imply the activation of own resources: in this case there is no need to be engaged in a collective unit, but just to accept certain rules.

There is then an active collaboration, the most challenging, which in turn can shift at the individual level or at the collective level. The first one concerns the activation of the recipient of the aid, through commitment and responsibility. In the REI – the new Italian basic income scheme, activation is expected through service contracts between social services and users. Collaboration can also take a collective shape, a group dimension. We talk about socializing individual needs, aggregating interests to converge on a new offering, shared help: if I am mother and part-time worker I can take care of the children of others in my free time, and this is given back when I am at work. Or again: an urban garden needs coordination and succeeds if one helps each other.

In addition, collaborative experiences can fluctuate between prevailing socialization goals and help, care, and assistance goals.

So we have two different dimensions: individual versus group and socialization versus social care. The following figure draws a field correlating these different dimensions, placing them along two continuum where we can place some examples.

The collaborative welfare field
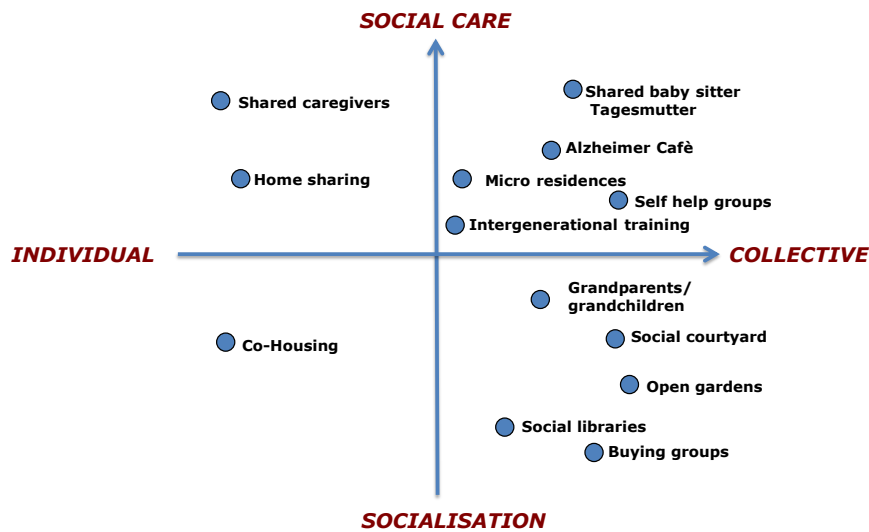
Compared to traditional services, the collaborative mandate changes: do not dispense but connect, not respond but build opportunities, no longer contain the ills of a fragile society but facilitate, undertake, mediate. Many of these experiences define increasing laboratories of innovation, which break the staff / user dualism, moving on topics and activities that overcome traditional categories (Ripamonti 2011, De Ambrogio and Guidetti 2016). The vocabulary of these practices changes accordingly: no more talk about users, performance, offer units. But activating, sharing, coping, reciprocating, trusting.

BEYOND THE STORYTELING: THE "#WELCO" PROJECT

There is a lack of knowledge on collaborative practices, the opportunities and difficulties they encounter. We need to get out of storytelling, the narratives of good things, and understand what really works and under which conditions. We tried to do this with this project. The storytelling surrounding these different experiences, being "new" and "good", tends to minimize their difficulties. We do not want to oppose any prejudice, but to build knowledge and learning based on empirical evidence.

The idea was to carry out an interpretative, basically qualitative analysis: we observed what goals were pursued, what results have been achieved, what can be attributed to these results, what doesn't. So what lights and shadows characterize these projects, what opportunities and which criticalities, and what lessons can be drawn.

We can summarize the objectives of the analysis as follows:

- How is the participative and collaborative welfare in Lombardy set up?
- What forms and in what fields does it express? Through which experiences?
- What strengths and weaknesses? What impact on demand? What are the critical issues?
- What are the conditions for development and replication? And what spaces for the third sector?

The first step has been to map collaborative projects, their growth, through which forms and formulas, with what expected results. With the intention of verifying concrete lines of development and indicating improvement actions in a field still dominated by experimentation.

We focused on six sectors:

1. **Help between families**, either peer-to-peer collaboration or the one mediated by facilitators and specific organizations. This is perhaps the broader field we have faced, where we found the most heterogeneous set of projects;

2. Territorial hubs, or "**community hubs**", that is specific sites with multi-function features (social, cultural, educational, artistic) which in turn can become incubators of help and collaboration between people and groups;

3. The experiences of **home-sharing**, between different generations and among the same generations;

4. The **shared, paid caregiver**, a very evocative formula on which we have tried to enrich empirical evidence, which is nowadays rather limited;

5. **Digital platforms**, as spaces where innovation, as the sharing economy teaches us, has so many opportunities to express itself;

6. **Mobility and transportation**, shared and assisted: an area where sharing economics has had a great deal of affirmation and where collaborative welfare presents all its differences and specifics.

Each of these sectors has been framed in terms of ongoing practices, in Lombardy and sometimes even outside the region. On this basis we have then analyzed some projects that are considered emblematic, highlighting elements of strength and criticality.

For each of the selected projects we have observed:

- History;
- The subjects involved;
- The results so far achieved, as the project has defined them;
- The elements of strength and weakness, the obstacles to overcome;
- Sustainability and reproducibility of the proposal.

The project – which started in summer 2016 and has been completed in May 2017 - has been promoted and sustained together with by a group partners: third sector organizations, labour unions, the municipality of Milano[1]. What follows sums up the main, overall findings we have reached. The entire report, in Italian language, with in-dpeth studies on each of the sectors analyzed, can be downloaded here: www.qualificare.info


WHAT DOES THE SHARED HELP TEACH US?

We have analyzed different sectors. We have carried out 12 case studies and we reviewed the existing literature and all the available data. They are more almost 70, if we put them in line, the projects we have known, explored, tried to understand. We were animated by the effort to keep together the narratives of the actors involved with all the evidence available.

So what? I intend to summarize now the most relevant elements we have collected. Let's see it clearly: the ground of collaboration is less easy than we had thought. Rich in ideas and initiatives in our region, but also in difficulty and resistance.

KEYWORDS

We asked each project examined to select the most important keyword of their experience, the most valuable one. It went like the chart below.

Projects considering "very important" the following keywords (%)
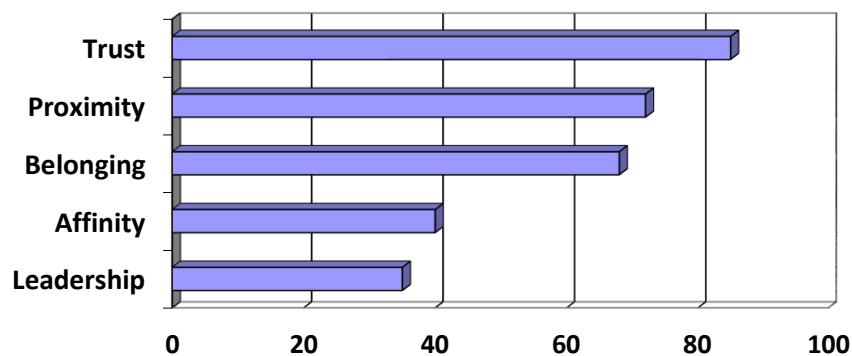
Trust is a feature that does not surprise us. It's common to the whole sharing economy. In order for an exchange to take place, a transaction without a trusting intermediary, we need trust which, in the case of sharing economy, is normally given by the *feedback system* left by users. In collaborative welfare these systems are not very much in use, not yet at least. Nevertheless trust seems to be the main key to collaboration. The question is: where does it come from?

The paradox of trust is that it is not created by direct will: it is something almost irrational, such as a feeling: it has its own times, it doesn't grow by direct effect. It is - as Jon Elster would say - a secondary effect of different actions: it cannot be pretended, it can only be offered and accepted. It results from a set of factors, behaviors, and ways to act. From reputation (Mainieri, 2013). Not from the cold evaluation of how many stars that restaurant has, how many positive and negative feedbacks. In social welfare it is usually connected to a direct experience, to feelings, to people I can see and listen to. It's a fragile resource, just enough to be cracked, it easily transforms into mistrust.

Trust is so the main agent to facilitate collaboration and exchange. It is not, it can not be, a prerequisite, because it cannot be independent of the knowledge and a variety of different subjective factors: competence, reliability. And convenience: trust must go

together with the means at disposal and the costs that may be required. A conditioned trust, compatible with one's means.

The second keyword is proximity, which has been indicated in two different terms. There is a physical proximity, and in this case we refer to places that offer something, where I meet people and where collaboration is be built. The fact that many experiences emphasize the importance of the physicality of places is also related to the theme of belonging, to feeling "at home" in one place. Mutual help snaps into a project that I feel is part of a story that involves me. It is no coincidence that membership is the third keyword mentioned.

Secondly, there is "a proximity of the aid", which means closeness to the role played in a helping relationship. There are roles embodying support functions because they are directly involved in the situation of those who can ask for help. We refer to the so called "user experts" in the field of dependencies and in psychiatry: witnessing changes in first place and willing to support the change of others. We also think of "conscious families" in co-housing experiences, with activation functions, support for managers, support in problematic courtyards.

COLLABORATIVE WELFARE IS NOT THE SHARING ECONOMY

The so-called sharing welfare, "a well-being that tries to redefine the concept of sharing" (Rensi and Zandonai, 2016), has its own specific features and is different from the sharing economy, at least fro three main reasons.

1. First, sharing economy is often referred to as a disintermediated arena (Mainieri, 2013). Now, disintermediation, as Antonio Belloni has stated, "works where it takes off an obstacle. It produces damage when it eliminates the steps that generate value "(quoted in Stringa 2017, page 9).

    In social welfare and education, what is at stake are not "objects". Neither are, usually, occasional performances, beginning and ending in a short period o time. What is at stake are long-term relationships. As such they need trust, a sense of security, reliability. All these dimension, given the fragility of the people involved, need advice, support, and protection. This is a brokerage service: sensible to the needs and interests of those who give and those who receive.

    There are some sectors in which it is easier to disintermediate: more likely when we deal with short and reversible services. But most frequently, disintermediation is difficult. I can evaluate an apartment on Airbnb if it matches my expectations, if the landlord is trustworthy and so on. Things are different when I need a paid caregiver ("badante"): I need her to be presented to me, I need to know who he or she is, I do not change him or her so easily. And I can appreciate a third party supporting me, a broker.

2. Secondly, in collaborative welfare places are important. We have called them "Community Hubs". The sharing economy, on the other hand, is an arena free of places: who knows where Airbnb or Foodora have their head office? By the way, who cares? The physical site is instead relevant in social welfare, it witnesses presence, reliability. It can be a collaborative incubator because it can catalyze the local community. The physical site is relevant because what is at stake is a continuity of relationships that need a space to be recognized and acted upon.

Many projects have created "Community Lab", as community welfare tools. They activate partnerships between peers if they are built as non-niche sites and are capable to offer different activities on the cultural side, entertainment, leisure, and food chains. Specific places can become community labs if they do not only offer "performances" but a diverse set of "opportunities", open, inclusive. If they become - as we have been told - evocative.

3. Lastly, collaborative welfare is achieved even without a digital platform, where it is vice versa essential in the sharing economy. Of course, many projects rely on sites, but these have a mostly informative function. This is an issue going through fast changes: the challenge is to move from predominantly informative sites to sites are able to transact, or at least to support transactions. From information to exchange, to the real match: this is the challenge that many digital platforms are facing in social welfare.

## BETWEEN CONDITIONS AND INTERESTS

One aspect that has emerged repeatedly in various projects relates to who is involved. What personal characteristics distinguish the persons involved and what interests push them? This is an underexplored issue. As a matter of fact, the field of possible collaboration can be defined by two vectors:

a. **The who**. Who is involved, both in social terms (social characteristics, education, economic conditions) and in terms of resources available: I have a room to rent and you are looking for it. Or again, I have time and skill, you are looking for my skills;

b. **The interests involved**: what I value, what I need, what can make me "feel better".

These dimensions can be placed along a continuum ranging from homogeneous situations to heterogeneous conditions, converging or diverging interests. Thus, a Cartesian field is depicted by the chart below. It distinguishes four conditions with its own characteristics. The structuring of this field has analytic function more than descriptive, as there are certainly mixed situations, overlaps, oscillations.

Let's start from the top right quadrant, which identifies a "virtuous" collaborative welfare, characterized by different conditions but amalgamated by the converging interests. For example, co-living joins different people, those who have accommodation resources and those who have not, in a formula which benefits both parties: one party is benefited economically and socially, the other for accommodation found at a low cost. Different but converging conditions. Examples as such can be many. Collaborative welfare is "virtuous" in these cases because it involves socially different persons. These can be wealthier people together with the more fragile people, who is lonely with who is not, and so on. Within a proposal where diversity - social, economic, cultural, relational - remains diversity and it is not homogenized, homologated. This is perhaps the greatest challenge of collaborative welfare: respecting diversity and making it a lever of help, exchange, and collaboration.

Collaboration between who?
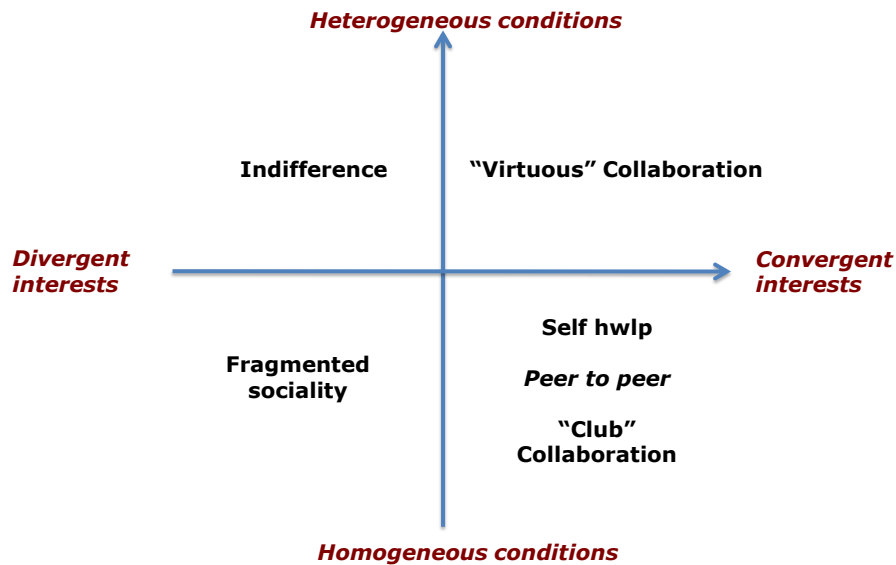
A different situation occurs when both interests and the social conditions are similar, homogeneous: we are in the lower right quadrant. Here, collaboration can take two forms:

- Mutual help, that is groups of equal experience, such as the *Family Group Conference*, or the Alzheimer's Cafe. Where a common problem aggregate persons, which stay together sharing their solutions.

- "Club" collaboration occurs when the aid component becomes less central and the dimension of social relation prevails. This frequently indicates a more socially closed collaboration as it involves more homogeneous population groups. To the extent of what we have collected, many experiences of Solidarity Buying Groups and Social Streets fall into this type.

The areas on the left side of the figure are characterized by interests that do not coincide or occasionally happen. They thus designate an absent or superficial collaboration, trapped in gestures moved by a commonality of conditions, similarly on the social scale but occasionally from common interests.

DEVELOPMENT DIRECTIONS

Collaborative welfare can grow in different directions. They are tied to common factors: the ability to build trust, to work on community common goods, to reach a "critical mass" (namely on digital platforms), but also to work for small groups (namely in peer support). There are also more specific factors. Let's look at them.

a. In **family aid**, experiences of reconciliation between job commitments and care commitments are being sustained by local programs. The Lombardy Region has strengthened its support for lifecycle reconciliation projects through the resources of the POR FSE 2014-2020, with a total budget of 2.5 million euros (DGR 6300 of 6th

March 2017). In the current Sia (Active Inclusion Support Scheme), Municipalities and Scopes are called upon to manage the measure with resources dedicated to enhancing services. Collaborative projects and interventions could widely find space in such measures.

In peer-to-peer collaboration there are areas of growth. Peer to peer help is becoming more widespread, and tested methodologies are growing, thiugh they should be better promoted and encouraged. It is in connecting the needs of one and the possibilities of others, or exchanging different aids one that a collaboration becomes virtuous. This will, and this ability, connotes the kind of collaboration and help that can be open between different groups of population, different in terms of socio-economic status.

b. **Community hubs** are often included in urban regeneration policies. The existence of a physical site is of crucial importance. The physicality of places can create bond, trust, belonging. Neutral spaces are needed, in the sense of spaces not directly related to one association, but to many. Sites must in a way also be evocative, visible, recognizable (how many places we visited completely devoid of directions!). Community hubs can allow collaboration, give people the opportunity to recognize each other. They find stability and perspective where they relieve themselves of the dependence on public funds.

c. **In Home-sharing**, between different generations and among the same generation, we have encountered strong cultural resistance. To be developed, it needs "big shoulders", that is large organizations that take care of this kind of proposal, together with a plan to promote, as I may concern active seniors, students, and even young people who are precarious or underpaid. It is a largely an underused opportunity, which requires a relevant initial investment.

d. **Baby sitter and paid, shared caregivers**. Very evocative figures, our analysis shows the difficulties, greater for caregiving for seniors, less for baby-sitter, to promote them on a large scale. This is due to economic disadvantage for the families, whose budgets still consider convenient a one-to-one relation, organizational complexities, and some cultural reluctance in families. The so called "condominium caregiver" is a possibility only for a certain type of seniors, with limited home care needs.

e. **Digital platforms**. In the collaborative welfare arena there are internet sites, but with a prevalent informative function and limited matching one. We reviewed ten cases of digital platforms:

- WeMi - www.wemi.milano.it
- Ni&No – www.nieno.it
- Familydea - www.familydea.it
- Hellougo - www.hellougo.com
- Bircle - www.bircle.co
- A Casa lontani da casa - www.acasalontanidacasa.it
- Rete del dono - www.retedeldono.it
- Non riservato - www.nonriservato.net
- HousingLab - www.HousingLab.it
- Network-Care – www.network.care

The missing jump - except for some exception - concerns the transition from information to fruition, exchange, and the purchase of services. Some digital platform is the result of a collaborative production between different social organizations. We have found that this becomes effective if it produces a synthesis, if it simplifies access to services for citizens. It makes less sense if the digital platform gives back a fragmented picture of possibilities, just a sum of what organizations involved can offer. From this point of view, brokering generates value if it does not simply reflect reality but if it produces a new one.

f. **Mobility**. As is well known, mobility is one of the most rapidly growing sectors in sharing economy: both in terms of peer-to-peer (BlaBlaCar or GetAround) and in terms of on-demand services (Car2Go, Enjoy. See: Vaughan and Daverio, 2016). At present, the area of aid to the mobility of vulnerable people is perhaps the one with more potential for development, even though it is subject to binding rules. There is certainly an entrepreneurial space which may grow here, in the assisted mobility. Such as the www.hellougo.com project, started in Milan by Acli association, a digital platform where one can reserve a driver of one's own car, in the case is preferable no to drive directly, for health o safety reasons.

CHALLENGING ROLES

For the **third sector, and social cooperatives** in particular, collaborative welfare calls for the reduction of the role of direct provider of services, in favor of facilitating, enabling, intermediating roles.

A change in the way to look at things is needed, a shift from a focus on "services" - for families, for the disabled, for the elderly, for the disadvantaged - to one on the activities of daily life: living, caring, working, educating. Acting as actors among others: resource activists, relationships, connections (Borzaga and Paini, 2011). It is not easy, in contexts that are used to more simple relationships, of the buyer-supplier type, based on the traditional dependency on public funds. Two examples. If, instead of setting up a new youth day care center I involve, in a collaborative project, the local Church activity, two associations and a volunteer group, I am giving value to what they do, I spend less as a public authority and generate an amplified outcome. If I reconsider, as a municipality, my home care service in a service that uses paid caregivers, and connects them with a variety of different personal services the community offers, I produce something that doesn't cost more but can respond much better to the needs of the elderly.

Italian social enterprises still have a low impact on the pay-for-care market, the on-demand one. There is a need to increase the share of resources coming from the private sector. A critical element, which has pointed out for many years, which can find solution in different ways, such as that of investing in new digital platforms to reach potential users (Como and Battistoni, 2015).

The sharing economy is characterized by several criticalities from the point of view of job conditions: see for example the digital work survey carried out by "Page 99" (AA VV, 2017). **Trade unions** are called to supervise the whole of working conditions in the so-called "Gig economy", conditions that are likely to be uneasy and far from any protection. They are called to overcome the risks of a downward and self-referential defense (String 2017). Moreover, it is important to continue to support this kind of experiences through social negotiation in the territories, by establishing agreements and

supporting pathways towards virtuous collaborative welfare: home and living issues, personal services, mobility, among the main sectors of activity.

How **public policies** can enhance collaborative welfare practices? I address the role of public policies with a question: are collaborative practices compatible with the traditional social welfare paradigm based on the relation between social workers and users? They can be complementary, not a substitute, because they belong to a different way of action.

Collaborative practices need to be involved in social planning in a greater extent to that in force today: from the local level ("*Piani di Zona*") to the regional one. Initiatives raised from the bottom must find "elevators" to climb, be legitimized, find recognitions and support, without being distorted or mislead. Public policies ha the responsibility to give space to such experience, without limiting them with restrictions and regulations. More concretely public bodies - at different levels, central and local – can:

- Open co-design workshops in which to interact with the main players, developing community of practices, a dedicated ecosystem, now totally lacking, useful as a start up developer.

- Support, through specific calls, the start-up of initiatives that want to move on collaborative grounds, addressing fragility situations building on exchanges, transactions, peer-to-peer support.

- Encourage initiative and aggregation between families, with similar needs, for shared solutions. The municipality of Milan has done this with the call for "Creative Families", as well as the municipality of Parma with the "Families Together". This latter consisted in limited amount of funds (up to 5.000 euros) for projects presented by groups formed by up to five families.

- Approve a national framework legislation, such as that proposed by the bill submitted by a bipartisan group at the beginning of 2016 (No 3564) on the sharing economy, which at the time of writing is being scrutinized Parliamentary committees. A law not to smother its growth, but to enhance it, regulate its tax system, facilitate its development, even within the public administration.

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