

Trends and Recommendations of the Municipal Spending Policy in the Context of Social Assistance Benefits – Initial Analysis



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1 Introduction

Social policy is the activity of the state, local governments, and nongovernmental organizations aimed at shaping the general working and living conditions of the population and pro-development social structures and social relations based on equality and social justice, conducive to satisfying social needs at an available level. (Kurzynowski 2006; Stecko 2017).

According to Zamorska (2010), social policy and institutions of the welfare state, especially the educational system and social assistance, are the main way of expressing social rights. By ensuring a minimum standard of living, the state compensates for inequalities caused by market distribution mechanisms and also minimizes violence in interpersonal relationships. Social rights, being redistributive rights, impose certain obligations on both parties (Balcerzak-Paradowska 2004; (Zamorska 2010). In modern Poland, the subject of special attention of social policy is obstacles that block the possibility of satisfying basic human needs. It is believed that the most important social issues in our country are, among others, poverty, unemployment, social pathologies, housing issues, health care, and educational gap (Kwapiszewska and Kwapiszewski 2012).

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State social policy refers to a number of tasks carried out by specialized organizational units' service-oriented society. The main subject of social policy is local government. Due to the decentralization of power, social policy powers were delegated to the level of municipal self-governments (Stecko 2017). Thus, local government has a fairly wide range of competences. His tasks include all public matters of local importance, in particular to meet the collective needs of the population (Kwapiszewska and Kwapiszewski 2012). The instrument of the state's social policy is social assistance. On the basis of the Act of 12 March 2004 on social assistance, it aims to enable individuals and families to overcome the difficult life situation that they are unable to overcome using their own rights, resources, and opportunities.

The term social policy is usually understood as purposeful actions of the state, aimed at directly satisfying social needs. Social assistance is recognized as a method of achieving social policy goals (Sierpowska 2011). The Act on social assistance introduces a division into cash and non-cash benefits. According to Article 36 of the Act of 12 March 2004 on social assistance, monetary benefits include permanent benefit, periodic allowance, targeted allowance and special targeted allowance, allowance and loan for economic self-empowerment, or assistance for self-empowerment and continuing education.

The issues related to the functioning of social policy are extremely important and are reflected in the literature on the subject (van Vliet and Wang 2019). The analyses presented in this area were based on analyses of solutions used in specific countries (Scheve and Slaughter 2004; Rehm 2016; Walter 2017) or on comparative analyses (Reynolds and Avendano 2019; van Vliet and Wang 2019). These analyses are also carried out from the perspective of various areas covered by social policy. Currently, the problem of deinstitutionalization is one of the most frequently discussed problems of social policy (Tomalak et al. 2011; Golczyńska-Grondas 2015; Petrowski et al. 2017).

The key challenge for social policy is to take into account the approach to broadly understood social assistance contemporary challenges posed by the current system of scientific knowledge, research results, as well as policies implemented at the national and EU level. Among them you can distinguish changed family model (infancy of families, single parenthood), late age of starting a family, increase in the number of single-person households, negative birth rate, decreasing fertility, or an increase in average life expectancy. Research conducted by the Regional Center for Social Policy shows that the phenomena strongly influencing the shape of social policy in Poland are currently aging of the society, long-term or severe illness and disability, helplessness in matters of care and upbringing or homelessness, and deepening disintegration of social groups. Thus, the purpose of the article will be to identify problems or areas of social life, which constituted the dominant category of expenditure of local government units in 2012–2018.

2 The Functioning of Social Policy in Poland in 2012–2018

2.1 Demographic Aspect

The demographic processes currently observed, such as changed family model (families of small families, single parenthood), late age of starting a family, increase in the number of one-person households, negative birth rate, decreasing fertility, or an increase in average, have a significant impact on the shape of social policy. According to the Population Forecast for 2014–2050 prepared by the Central Statistical Office in 2014, the downward trend in the population in Poland will deepen (see Fig. 1). By 2050, the largest number of people in the 85 age group will increase, while the number of people in the 30–34 age group will decrease the most, by just over half. In 2018, the largest group were people aged 35–39 – they constituted 8% of the total population of the voivodship, while in 2050 the Central Statistical Office predicts that the most numerous group will be people aged 65–69 (almost 9% of the total population).

Another feature conditioning the shaping of social policy in Poland is the strong aging of the population observed. This situation determines, as it were, the creation of new solutions related to the state's social policy directed at innovative methods of supporting the accumulated functioning of the elderly. The average life expectancy in most of voivodeship residents is shorter than the national average. In Poland, in 2017 the average life expectancy for women was 81.8 years and for men 74 years (GUS data). Lodz voivodeship recorded the worst result in this category among all voivodeships. The same value of average life expectancy (in the case of the indicator for women) was achieved only by the Silesian Voivodeship (CRPiS 2019). At the same time, the life expectancy of women is longer in the countryside, while men in cities (see Fig. 2).

The age structure of the population undergoes unfavorable changes – the percentage of population in pre-working age decreases and increases in post-working age (see Fig. 3).

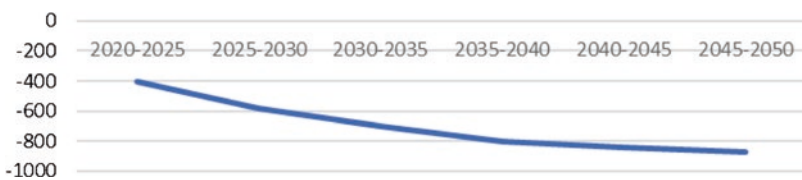


Fig. 1 Projected population changes in Poland in 2018–2050 compared to 2018. (Source: own study based on Population forecast for 2014–2050, CSO 2014; Population. Condition and structure, as well as natural movement in territorial division in 2018. As of 31 December, Central Statistical Office of Poland, Warsaw 2019)

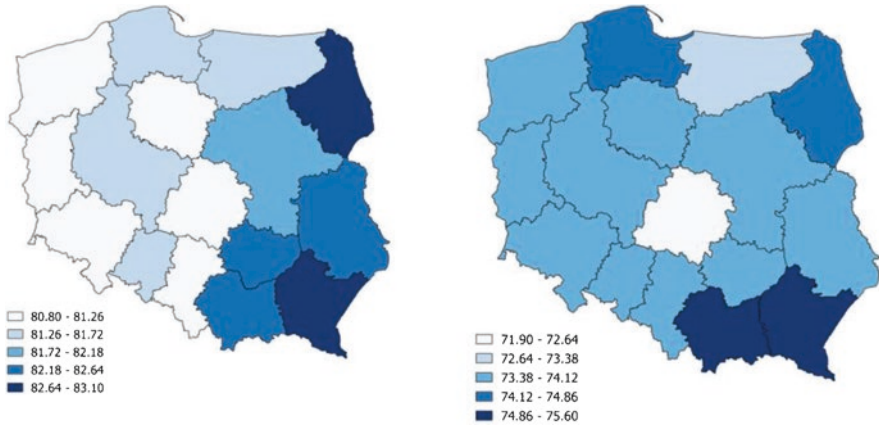


Fig. 2 Average life expectancy (in years) of women (left map) and men (right map) in 2017 by voivodeships in Poland. (Source: own study based on the data of the Local Data Bank of the Central Statistical Office; Population. Condition and structure, as well as natural movement in territorial division in 2018. As of December 31, Central Statistical Office, Warsaw 2019)

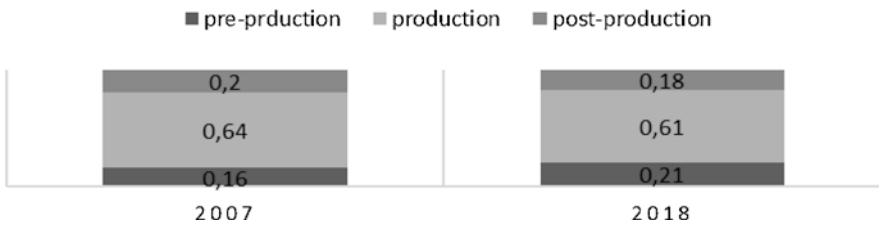


Fig. 3 The structure (in %) of the population by working age in Poland in 2007 and 2018. (Source: own study based on the data of the Local Data Bank of the Central Statistical Office; Population. Condition and structure, as well as natural movement in territorial division in 2018. As of December 31, Central Statistical Office, Warsaw 2019)

2.2 Characteristics of Social Benefits

The staff of social assistance organizational units are persons employed in social assistance centers (commune level), poviats family assistance centers (poviat level), and municipal family assistance centers (performing social assistance tasks at both commune and poviat level) on the basis of an agreement on work, regardless of the area of tasks performed (e.g., social assistance, family benefits, foster care). The staff also includes persons employed under the ESF resources. Data illustrating employment relate to years 2012–2018 (Fig. 4).

What is more, the share of people using social assistance in the total population of the region in Poland fluctuated between 3.5% and 8% in the years 2012–2018 (Fig. 5).

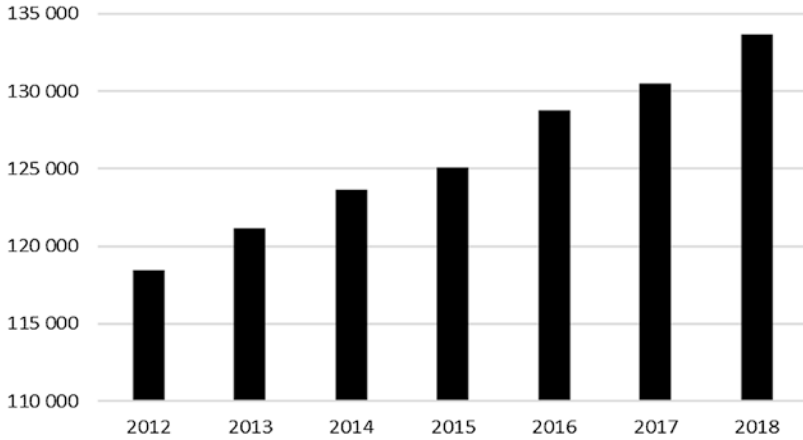


Fig. 4 Employment in organizational units of assistance and social integration. (Source: own elaboration based on data provided by the Ministry of Labor and Social Policy)

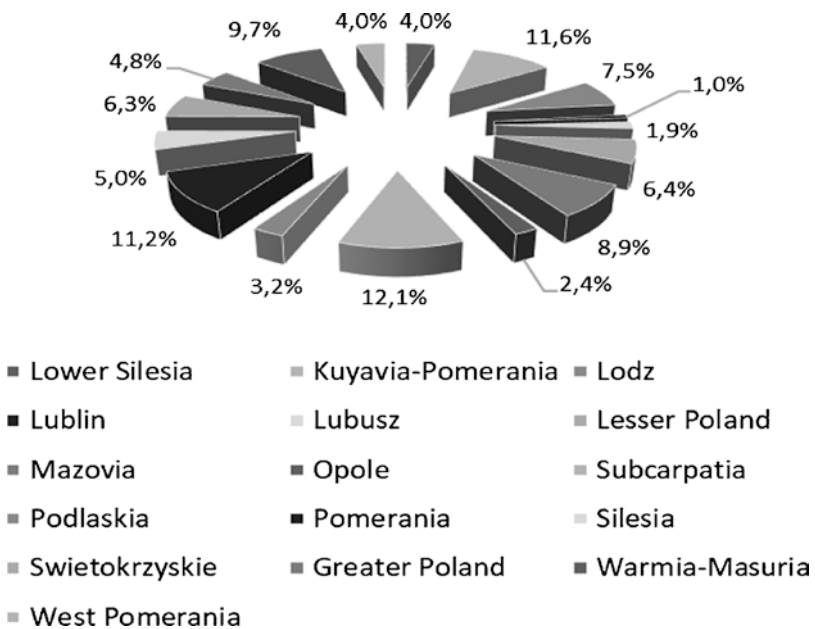


Fig. 5 The share of beneficiaries of social assistance in the total population of the voivodeship between years 2012 and 2018. (Source: own elaboration based on data provided by the Ministry of Labor and Social Policy)

Benefits provided by the state through municipalities are divided into own tasks and tasks assigned to municipalities. Forms of assistance financed as part of the tasks entrusted to municipalities are, among others, special care services at the place of residence for persons with mental disorders, objective benefits to cover expenditure related to a natural or environmental damage, and remuneration due to the guardian for providing care granted by the court. However, as part of these forms of assistance, the most important are special care services at the place of residence for persons with mental disorders and remuneration due to the guardian for providing care granted by the court. Their share in the total value of benefits is estimated at 81.33% and 14.76% in 2018, respectively. The highest costs of specialist care services for people with mental disorders were recorded in the years 2012–2018 in the Subcarpathian Voivodeship and the lowest in the Lodz Voivodeship.

Benefits granted as part of the municipal's own tasks include financial and non-financial benefits. Financial benefits are permanent benefits, periodic benefits, and targeted benefits, while nonfinancial are shelter, meal, clothing, care services, etc.

Non-cash benefits are social assistance services offered by municipal social assistance units. An important item in the framework of non-cash benefits is supporting residents of the Lodz Voivodeship by providing them with a free meal. This benefit is mainly granted under the multiannual program "State aid in the field of feeding." Data obtained from social assistance centers show that in the Lodz Voivodeship in 2018, support in the form of a meal covered 28.2 thousand persons (31.7% of persons covered by social assistance benefits), which is about 300 smaller than in 2017. The amount of benefits provided was nearly PLN 16.7 million (RCPiS 2019). For comparison, this value exceeded PLN 330 million nationwide.

As part of periodic benefits, benefits are granted because of unemployment, long-term illness, disability, etc. From among these categories, the highest value of benefits in the years 2012–2018 was allocated to permanent benefits (28%), periodic benefits (24%), and for meals (12%). The figure above (Fig. 6) presents one of these categories in the years under discussion.

The cash benefit which was granted in the highest value in 2018 was a permanent benefit. In addition, the value of these benefits is subject to an annual growth trend (Table 1).

Social assistance centers and poviats family assistance centers offer residents very broad support. In addition to support provided on the basis of an administrative decision, they provide support without the need to issue such a decision or carry out

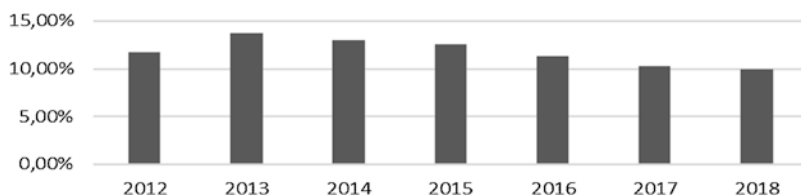


Fig. 6 Share of selected forms of assistance (meals) financed as part of municipalities' own tasks. (Source: own elaboration based on data provided by the Ministry of Labor and Social Policy)

Table 1 The value of social benefits by type (100 th. PLN)

	2012	2013	2014	2015	2016	2017	2018
Permanent benefits	711,45	862,84	898,16	939,58	1069,45	1057,04	1018,32
Periodic benefits	727,35	1007,06	961,27	908,90	838,61	701,55	588,40

Source: own calculations based on data provided by the Ministry of Labor and Social Policy

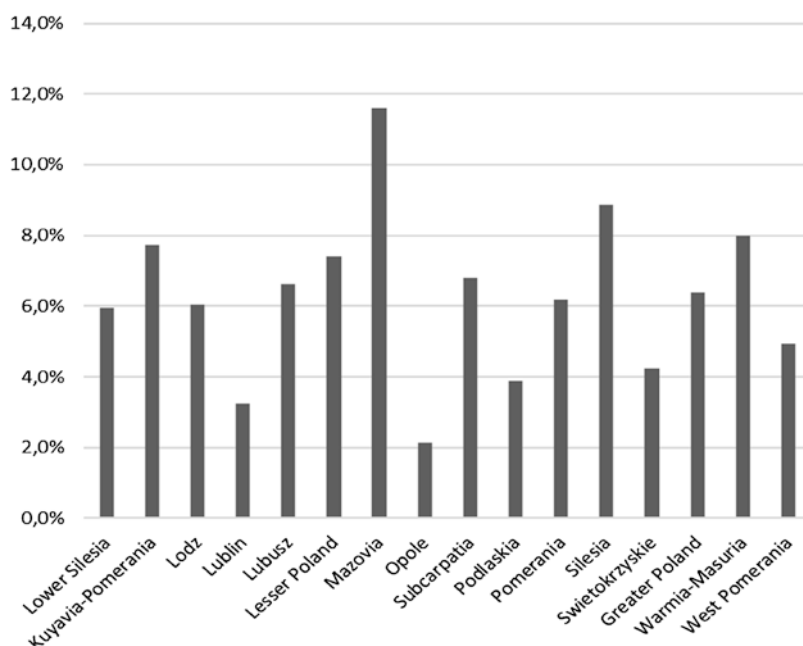


Fig. 7 The share of the number of people from individual voivodeships in Poland who were granted benefits between years 2012 and 2018. (Source: own elaboration based on data provided by the Ministry of Labor and Social Policy)

environmental intelligence. To present the scale of the demand of Polish residents for benefits financed under social assistance, it is worth referring to the number of people who were granted such a benefit. In 2018, 1.3 million people were covered by social assistance benefits (financed from both sources). This corresponded to about 915,050 families, of which 396,011 were families located in the countryside. Going into the details, it is worth looking at the share of the number of people from individual voivodeships in Poland who have been granted benefits (see Fig. 7). The voivodeship that received the most assistance was the Masovian Voivodeship, while the least aid was received by the Opole Voivodeship.

Social benefits are mainly granted because of the difficult financial situation, which refers, among others, to poverty, orphanage, homelessness, unemployment, disability, long-term or serious disease, fraudlessness in care-education matters and household care, or the need for protection of maternity. Going into the details, the Lodz Voivodeship was analyzed. The most common reasons for providing

assistance and support in the Lodz Voivodeship in 2018 (similar to previous years) were (RCPiS 2019) long-term or severe illness (social assistance was provided to 50.3% of families), poverty (43.9%), unemployment (42.3%), disability (39.5%), and helplessness in matters of care and education and running a household (19.5%). Other less frequent reasons for providing support include the need to protect motherhood (about 10%), alcoholism (8.6%), homelessness (less than 3%), and difficulties in adapting to life after release from prison (1.7%). However, between years 2012 and 2018, the most families assisted were those in connection with unemployment and poverty (Fig. 8). However, the number of families with aid granted decreases constantly since 2012.

The scale of using social assistance differs in individual voivodeships. The most favorable situation in this respect took place in 2018 in the Silesian Voivodeship, where people covered by support from social assistance in the area of poverty constituted only 1.8% of the population, as well as in Opole (2.1%) and Lower Silesia (2.1%). Definitely the least favorable situation was observed in the Warmia-Masuria (4.8%) and Kuyavia-Pomerania (4.7%) provinces. In the vast majority of the voivodeship, the percentage of inhabitants using social assistance decreased compared to the previous year or remained at a similar level (see Fig. 9).

To sum up, support provided under social assistance is more effective if it is comprehensive. One of the important elements of the complexity of support is cooperation with entities from the public social assistance environment, including non-governmental organizations. As it results from analyses carried out by governmental institutions (RCPiS 2019), almost half of communes within voivodeships do not use these possibilities. In the Lodz Voivodeship, in 2018, only fishing for communes undertook cooperation with nongovernmental organizations. The most common form of such cooperation was commissioning tasks, which may include, among

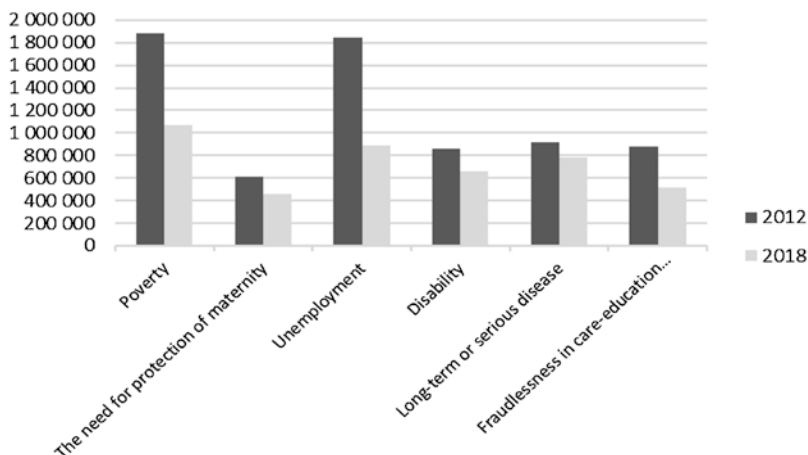


Fig. 8 Number of families with aid granted in Poland between years 2012 and 2018. (Source: own elaboration based on data provided by the Ministry of Labor and Social Policy)

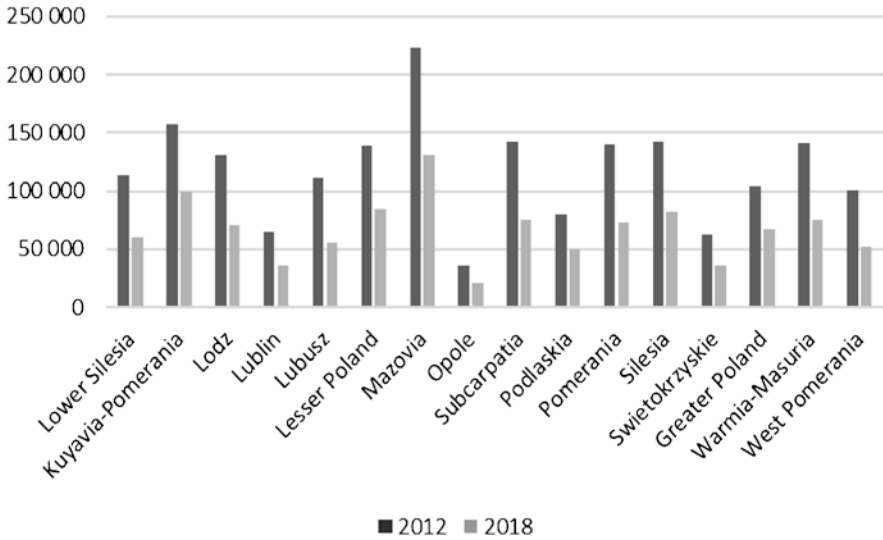


Fig. 9 The number of people receiving social assistance in the field of poverty. (Source: own elaboration based on data provided by the Ministry of Labor and Social Policy)

others, providing care services (also specialist) and running various types of social assistance units.

3 Conclusions and Recommendations

It seems obvious that the key challenge for social policy is the adaptation of activities resulting from the impact on the social policy of the current state of knowledge, research results, or the state policy itself. The essence of change in the contemporary approach consists primarily of the need to focus all activities carried out by individual units under social assistance tasks and effective solving of social problems and integration of the local environment as well as striving to professionalize staff and standardize services while deinstitutionalizing and individualizing the support provided (Golczyńska-Grondas 2015, RCPiS 2019).

The most important changes in this area include, inter alia, the implementation of a strengthening approach and launching empowerment, which assumes moving away from charity to supporting activities and moving from surrounding the unit with help towards its activation (Czarnecki 2013). In addition, it seems extremely desirable to move away from intervention solutions in favor of social, system, and network solutions (Grewiński and Krzyszkowski 2011). Activating the natural social environment and strengthening the community's potential also seem to be extremely important.

The demographic processes currently observed, such as a changed family model (family infancy, single parenthood), the late age of starting a family, an increase in the number of one-person households, a negative birth rate, decreasing fertility, or an increase in the average, have a significant impact on the shape of social policy and life expectancy. In addition, in accordance with Voivodeship Social Policy Strategies, particular emphasis should be placed on supporting people at risk of exclusion, such as aging population, long-term or severe illness and disability, helplessness in matters of care and upbringing or homelessness, and deepening disintegration of social groups (RCPiS 2019).

Considering the analysis, it is worth presenting a few recommendations (RCPiS 2019). First of all, it seems extremely important to guarantee the appropriate number of social service staff together with ensuring extensive support for the process of their professionalization. Secondly, it seems valuable to develop a form of support in the form of individual programs and plans of work with social assistance clients (including, among others, social projects), enabling adaptation of assistance to individual needs and individual situation of clients, and the use of a wide range of tools, including those from outside area of social assistance, including vocational activation (RCPiS 2019). Thirdly, it is also extremely important to match the offer of social care homes due to changes in the demographic structure of residents and the increase in their health needs and to provide adequate support to lonely elderly and disabled people by developing care services in the place of residence along with the extension of the offer of environmental forms of care. Fourth is the desire to deinstitutionalize foster care for family foster care and develop protected housing. It would also be particularly important to strengthen cooperation with nongovernmental organizations.

Recommended tasks are a necessary step on the way to transform the “rescue” assistance system into a supportive social assistance system. Systemic change in this area must be based not only on a new approach in thinking about social assistance as an important element of social policy but must be strengthened by new opportunities for social support and impact as well (RCPiS 2019).

The main limitation of the study was the high level of data aggregation. Conducting this analysis on the basis of data with a lower level of aggregation, e.g., at the poviats or commune level, would allow for a more detailed depiction of the processes taking place within the expenditure trends of the social policy.

In future studies, the authors will try to explore in details the structure of social assistance benefits on the example of family foster care in Poland.

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