

Experts by Experience in a Planning Process of Social Policies at local level: A Practical Experience of Participation

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Abstract

This paper intends to present a practical experience of participation made by experts by experience in a planning process of social policies at local level, specifically in the issue of poverty, conducted in a district of Northern Italy.

This practice was documented with an action research, which aimed to explore how to support the participation of experts by experience in a social policy planning established to plan interventions against poverty.

The author of this paper was the social worker who facilitated this participatory process.

A brief description of the process of implementing participation and how the social worker facilitated the direct interactions between the professional knowledge of managers and policy makers and the experiential knowledge of service users is followed by a methodological reflection focusing on the Relational Social Work (RSW) principles applied to this experience.

Keywords

Poverty, Participation, Relational Social Work, Welfare Society, Experts by Experience.

Introduction

This article is based on a practical experience conducted in Northern Italy aimed at exploring how to support the participation of experts by experience on poverty in a planning process of social policies at local level; an action research was conducted to support and review this participation process.

The introduction will briefly present the issue of poverty, focusing on the participation of experts by experience on this topic in social work. Subsequently, the context, the participation process and the results will be described, while the potentials, criticalities

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and benefits for the participants will be discussed through methodological reflections based on the principles of Relational Social Work (Folgheraiter & Raineri, 2017).

The phenomenon of poverty has always existed and, while changing throughout history and space, has remained a significant social risk. Sociologist Bauman, assuming that poverty will never end, states that its meaning is and always will be relative (Bauman, 2018), as it is an ever-evolving process and a social fact determined by belief systems.

Poverty is a multidimensional problem, people who face a condition of poverty are subject to numerous related deprivations, which feed a vicious cycle of violations of the rights set forth in the Universal Declaration of Human Rights (United Nations, 1948). Based on this Declaration, poverty has a negative impact on people's lives at multiple levels: lack of nutrition, poor health, limited use of health care, low levels of education, hazardous work activities, unhealthy housing, unequal access to the justice system, socially deprived relationships, and exclusion from participation in political power.

According to this Declaration, poverty is a violation of human rights. Recognising the poor as resourceful, responsible for their own lives and capable of taking action means acknowledging their active role in helping relationships and in the social system they belong to (Panciroli, 2019). Without this recognition, they would suffer further deprivation at the hands of the social workers and services to which they turn for help, as they would be denied the right to self-determination and have a say on how to improve their condition.

Participation of Experts by Experience in Social Work

The participation of service users and carers in social work is a fundamental principle of the ethics of the profession. The Global Social Work Statement of Ethical Principles states as follows:

Social workers work promoting [...] the full involvement and participation in decisions and actions that affect their lives [...]; contribute to the creation of meaningful spaces and processes for people's participation in the formulation of policies (International Federation of Social Workers, 2018, art. 5).

Based on this principle, social workers are called to promote the full involvement of people in the choices and actions that affect their lives. Full participation is achieved when there is the active involvement of stakeholders in the reflection process and actions aimed to address a perceived problem, resulting in equally sharing power among practitioners, citizens and caregivers (Warren, 2007).

Particular attention should be paid to people belonging to vulnerable groups, who have fewer opportunities to have their voices heard, ensuring that they can share their thoughts and influence the decision-making process. Promoting participation means,

in fact, including those who are often excluded, and those living in poverty and severe marginalisation are a case in point.

Social workers should promote participation, supporting the development of a culture of active involvement by building non-oppressive and emancipatory relationships among professionals, users and citizens through the creation of equal conditions and partnerships (Warren, 2007). The Relational Social Work approach is particularly suited to pursue this objective, as, by definition, it promotes participation and reciprocity among professionals, service users and caregivers (Cabiati & Panciroli, 2019).

A helping relationship is effective when the social worker provides technical-professional skills and the users and caregivers have the opportunity to share their experiential skills (Folgheraiter, 2016). Experiential knowledge refers to knowledge derived from the experience of individuals who have gone or are going through a difficult situation, it is learned by experience and can be applied to future similar situations (Folgheraiter & Raineri, 2017). In fact, people who experience problems in life learn, understand and process their difficulties, gradually acquiring specific skills that allow them to cope with a particular condition and, therefore, they are referred to as experts by experience.

Recognising the poor as people having experiential knowledge makes it possible to overcome a passivizing and devaluing approach, counteracting the idea that the poor are the bearers of minor, partial, or incomplete knowledge; on the contrary, they are the repositories of lived knowledge, an experiential knowledge on the specific circumstances they are facing (Krumer-Nevo, 2005).

In addition to possessing knowledge about the problem they are living, they acquire information about and a unique understanding of the experience of poverty, the social class to which they belong, the functioning of the services provided to them, and welfare policies and institutions. This makes them not only experts in the experience of poverty, but also critical experts in society (Krumer-Nevo, 2008) and, therefore, bearers of a worldview that is fundamental for rethinking policies and organizations working to combat poverty (Panciroli, 2019).

In this perspective, the participatory approach can be a useful resource for the welfare system at different levels, such as fieldwork, management and policy making.

By focusing on relational networking at higher management and local policy-making levels, some research has explored participatory practice to engage users in forms of active citizenship (Cornwall & Gaventa, 2000; Cook, 2002), studied the advantages and disadvantages of citizen participation at this level (Irvin & Stansbury, 2004) and the role of social workers can play in these political processes (Postle & Beresford, 2007; Boehm et al., 2018; Darawshy et al., 2021).

Social workers can carry out an advocacy based on their field experiences or facilitate direct interactions between the technical knowledge of managers/policy-makers and the experiential knowledge of service users, carers and volunteers. A research by

Boehm, Darawshy and Boehm-Tabib (2018) studied the factors that promote and hinder the political involvement of social workers and their encouragement of users' political participation; another study investigated the extent to which social and professional values influence social workers' engagement in political practice (Weiss-Gal & Gal, 2008).

The aim of involving users in policy planning is to allow them to participate in decision-making processes that impact their lives (Postle & Beresford, 2007) and to play active role, not just receiving social services (Bovaird et al., 2014).

This approach is based on the principle that an effective planning of social policies from a welfare society perspective also requires the service users' and citizens' feedback and knowledge (Folgheraiter & Raineri, 2023).

The welfare society is an open, flexible and creative system, established on the belief that its development depends on a close relationship between civil society and welfare systems (Folgheraiter & Raineri, 2023). For this reason, the experiential knowledge of poor, homeless and marginalized people can potentially become a resource for the general society (Krumer-Nevo, 2008) and be valued in the co-construction of the same welfare system that should support them (Folgheraiter & Raineri, 2023).

Action research method

The aim of this practical experience was to explore, promote and support the participation of experts by experience in a planning process of social policies at local level. The process was documented and studied in a qualitative way with the action research method.

Action research is an approach in which the researcher and stakeholders collaborate in diagnosing the practical problem and developing solutions (Bryman, 2012). In action research, knowledge and solutions occur simultaneously (Joubert & Webber, 2020): in this case, research has provided insight into how to support the participation of experts by experience in a planning process of social policies.

This method was chosen to support the goals of the participatory process, in fact, action research is a collaborative approach, based on power and resource sharing among participants, building positive relationships to achieve a common outcome (Joubert & Webber, 2020). In addition, action research is consistent with the research question, allows the participation of marginalized groups and the enhancement of views, voices and experiential knowledge of users of the welfare system (Krumer-Nevo & Barak, 2006).

Qualitative tools were used to: collect opinions and expectations; understand how users would like to be supported during their participation in a planning process of social policies; document how the participatory process took place; delve into the strengths, critical points, elements facilitating or hindering participation.

Two focus groups with experts by experience to explore expectations, whether and how they wanted to be supported in participating in the proposed activity, and a focus

group following the participatory meeting to collect perceived strengths and weaknesses were carried out. Six experts by experience took part in the three focus groups. The focus groups were audio-recorded and subsequently transcribed, noting the extralinguistic elements, a thematic analysis of the texts was conducted, identifying codes and subcodes; thematic summaries were produced.

Participant observation was carried out in order to analyse how the meeting between the practitioners involved in social policy planning and the experts by experience took place. Ethnographic notes were produced and constructed homogeneous macro-categories of collected documentation. Subsequently, specific properties were identified for each segment, allowing their qualification; finally, the relationships that unite or conflate the different segments were identified.

Audio-recorded semi-structured interviews were conducted with five professionals (the group leader, a social worker, two social service managers, a volunteer of a no-profit organization) involved in social policy planning to explore perceived strengths and weaknesses.

Linguistic, paralinguistic and extralinguistic aspects were transcribed and a text was drafted; a thematic analysis of the text was conducted, identifying codes and subcodes, and a thematic synthesis was compiled. Seven members of social policies planning group, specifically the group leader, two public social services managers, a social worker, a director of a no profit organization, two volunteers as president and vice-president of a voluntary organization, and six experts by experience took part in this action research.

Context of the Practical Experience

This experience was carried out from June 2021 to June 2022, in a district of Northern Italy with a total population of just over 160,000 inhabitants. Italian National Law 328/2000 established an instrument through which municipalities, grouped together by geographical areas, plan and implement an integrated system of social interventions and services. This law stipulates that municipalities, local healthcare providers, profit and no profit organizations participate in this project.

In order to pursue this objective, each district establishes a permanent planning group, subdivided by thematic areas (e.g. Disability Planning Group, Poverty Planning Group, etc.). The planning group, initially, has the task of defining the demand and delivery of social interventions for their area, assessing needs, resources and criticalities. In this phase, the contribution of social workers conducting fieldwork is fundamental, as they can also facilitate the involvement of users and/or caregivers giving them the opportunity to share their points of view.

Experts by Experience in participatory planning process of social policies

Starting from the data collected during the action research, the experience will be presented step by step.

Initiation and composition of the group of experts by experience

The criterion used to identify the people to involve in this experience was to propose it to those who were motivated to participate and had experienced or were experiencing a condition of poverty, without having the ambition of considering this group representative of all types of poverty.

A heterogeneous group was catalyzed: a young Italian care leaver; an unemployed Italian woman residing in a public nursing home; a foreign woman who was a victim of violence and is the mother of two minor children; a foreign man, married with children, who is completing the immigration process for his family; a foreign man, who has completed a humanitarian corridor project, and is also acting as a linguistic and cultural mediator; a disabled Italian woman.

The objective of the meeting was to create a dialogue among the participants, allowing them to present their ideas on poverty, some from an experiential point of view, others from a professional one, to acquire the most complete picture as possible of poverty in the area, to be used in the subsequent planning of interventions to combat this issue.

The expectations of experts by experience

The focus groups revealed that service users undertook this participatory experience with a desire to have their voices heard and the hope of concrete actions aimed at possible changes. The expectations stated in the focus groups proved to be realistic, clear and consistent with the objectives of the proposal.

We hope to try [...] There is hope. If we are here, it is because there is a conviction anyway, in the sense that it can serve a purpose, of course it can be useful, otherwise we wouldn't all be here [EBE 3].

There were no concerns or fears regarding the interaction with members of the planning group.

No, I don't have any difficulty in coming forward, neither I had it in asking for help [EBE 4].

The group was given the opportunity to organize their participation in the participatory meeting as they saw fit, choosing to be involved as much they wanted to be (Warren, 2007). Arrangements were shared by all service users to facilitate the experience; following a negotiation between having only some of them participate as representatives of the group or having all of them present, it was decided that all of them would attend the planning group on designing anti-poverty policy and programs.

In my opinion it is fair to have our voices heard, everyone's voices. Also because usually it has always been that one [practitioner] is everyone's voice, instead if we all meet... everyone has their own situation... [EBE 3].

In addition, experts by experience were able to decide how they preferred to be supported in the participatory meeting, a foreign man who has difficulties communicating in Italian decided to be assisted by a volunteer from the church, who knows his story and helps his family with daily chores.

Social worker: the role of facilitator

The author of this paper is the social worker who facilitated this participatory process.

It is important that the participatory process is accompanied and conditions are created for everyone to bring their voice. It is possible to stumble into one of the participation traps when adequate expert support is not ensured in the process, which is why it is good to give shrewd support to experts by experience so that they can take part to the best of their abilities (Panciroli, 2019).

The social worker, at the beginning of the meeting, reiterated to the participants the purpose of the meeting and the context of equality in which it was taking place. The facilitator is the figure who accompanies the group to pursue a purpose, guided by methodological awareness, performs intentional technical operations, such as: allowing members' voices to be equal, observing, mediating conflicts, enforcing rules, reformulating interventions when necessary helping communication, keeping the goal in sight (Folgheraiter, 2016).

After the first speech of an EBE, no one continued to speak, I raised the question to the group, asking if others had had experiences, professional or life, with the problem just mentioned. Afterwards, the dynamic in communication was more fluid [Ethnographic note].

The social worker, facilitating and studying the process, had clear the purpose; during the discussion, she managed any difficulties that might have hindered authentic participation, in particular helping the group to recognise different points of view and legitimising differences.

After EBE2 speech, the public social services manager 2 intervenes and proposes an operator-user dynamic, going in the direction of deepening the EBE's life story, without focusing on her personal experience. The aim of the meeting is to recompose knowledge, both experiential and professional, on poverty in the area. I reformulated the intervention and relaunched it so that a one-sided dynamic would not be created and each person would focus on his or her own knowledge [Ethnographic note].

Relational and interactive aspects

The ethnographic notes collected during the planning process allowed us to identify some significant elements useful to analyze the level of participation and equality among its members.

The members of the planning group were evenly distributed, those with higher professional roles did not sit in particular positions at the table but close to the others. The experts by experience arranged themselves close together, only one of them moved away from the group and sat next to the facilitator, with whom he had already conducted focus groups.

It is interesting to note how the participants positioned themselves with the professionals turned toward the experts by experience while the experts by experience looked more at the facilitator than at the professionals.

It was noted that the experts by experience participated with clear, relevant, and constructively presented interventions, thanks in part to the preparatory meetings for this advocacy action that helped them reframe the content they wanted to express; the atmosphere was relaxed.

As confirmed later by the focus group with the experts by experience and the interviews with the professionals, it was noticed some controlled emotion on the part of the experts by experience and embarrassment on the part of some professionals, who initially found it more difficult to interact with the guests in a natural way, as if unsure of how to relate to them. Over the course of the meeting, however, the modes of interaction changed, and in the middle and final stages the professionals talked with the experts by experience in more equal ways, the interventions of the operators, volunteers, and managers alternated with those of the invited people, each waiting their turn. Both groups spoke during the meeting for approximately the same length of time, with no need to stimulate the participants' involvement.

Evaluations: professionals' views

Interviews with professionals revealed fears about the possibility of putting service users in an awkward situation by inviting them to bring their knowledge of poverty into a

local area planning context, and concerns about the approach to be taken with experts by experience during the meeting. However, it turned out that these concerns were unjustified as the professionals did not meet any of the expected difficulties.

I have to say that I experienced a feeling of... I don't know whether to call it discomfort, not completely comfortable because I saw myself in the role of the 'normal one', the person without problems, who was there to listen [...] I was afraid of having a judgmental approach toward those who came to share their experience.» «How it was handled then, even the sharing and the discussion [...] I don't think it created that feeling, it was more my personal problem of hesitation. [...] It went better than I expected... I didn't see them uncomfortable [Public social services manager 1].

Regarding the content, professionals recognized the importance of sharing knowledge. Practitioners who work in the field and meet people in poverty on a daily basis also reported that due to the different context, they were able to recognize what they had not understood in their daily work: the added value brought by citizens and service beneficiaries in a planning process of social policies.

[The participatory experience] is really significant. When we thought about involving people in a social policy planning, I couldn't imagine how we could interact without maintaining a distance between the operator and the beneficiary. Instead I found it really very useful, a really open and meaningful discussion to understand what these people are experiencing and have experienced and to get a little more realistic picture [Group leader].

Finally, the topic of the future came up in all the interviews: practitioners expressed a desire to systematize this experimentation as «*something that should and can be experienced*» [Public social services manager 2], made proposals to implement it, but also questioned how it should be put into practice and the investment needed to prepare for participatory meetings, wondering about how much work it requires and its sustainability.

Evaluations: experts by experience's views

The focus group revealed that participants who were experts by experience engaged in the proposed activity with natural excitement; they felt observed and listened to; comforted by the facilitator's presence, they sometimes looked at her before speaking.

All group members said they felt calm and comfortable; some of them were surprised to feel understood when professionals raised issues they were experiencing firsthand. The interventions of some professionals who, in addition to their technical views, shared their personal experiences as citizens were also appreciated, the experts by experience feel more understood.

Only in one case did a participant say that she did not feel heard, and that episode annoyed her. Apart from this sporadic occurrence, the experience seems to have been

positive and formative for the participants, who said they gained information about the helping process and how social services work, recognizing themselves as more knowledgeable and competent citizens increased their empowerment and self-confidence.

Now, thanks to this experience I am learning, I am understanding how it works [local planning to fight poverty.] [...] Through these meetings I have understood many things, and to me this is an additional experience [EBE 6].

I realized that I need to be more courageous [EBE 5].

Those who had experienced poverty in the past and have now achieved a higher level of well-being said that they participated in the system advocacy for those who are now, or will be in the future, experiencing a similar situation.

If something changes, it will change something for others, certainly not for me [...] I didn't do this for myself [EBE 2].

The focus group revealed that some experts by experience had little hope that their participation would lead to real change «I have the impression that nothing will change [...] I hope they do something, I have very little hope» [EBE 2], while others believed it possible, although aware that it could not be done right away, they hoped it could happen in the future, recognizing the importance of joining forces in advocacy.

For me the goal of this meeting was to talk about an issue, [...], there comes a time when we are a big group and we can change some things together [EBE 6].

Strengths and critical points identified by professionals and experts by experience

Professionals through interviews, and experts by experience through focus groups identified the same strength that, in their opinion, facilitated participation: the preliminary meetings with service users. However, two different meanings were attached to this element.

The professionals considered these meetings useful because they allowed the experts by experience to learn about the meeting context, its purposes and constructive ways to express themselves, thus avoiding the risk of the meeting becoming just a venting opportunity.

Definitely a strength was that it was clear that people had been supported and helped to participate at this level, because I guess it's not easy for a beneficiary person, without regard to the topic, to share their views, to be in front of so many unfamiliar people, to also understand why and why not [Group leader].

Well the fact that you felt the meeting had been prepared, I don't know how long it took to prepare this meeting [...] I expected that the meeting would be prepared and

that a confrontation would then be possible. I was very happy with what happened [Public social services manager 2].

Experts by experience considered the preliminary meetings valuable because they made possible to create a group in which they felt included.

Getting to know the other participants, the difficulties and interventions they would bring to social policy planning, having a coalition.

Collaboration and unity among us because we already know each other [EBE 3].

Helping [others] to say something if they cannot express themselves [EBE 2].

The weakness identified by some professionals concerned the language and communication difficulties of one participant, who had asked a volunteer he trusted to translate for him when needed.

With respect to weaknesses, language for someone. I remember a man who struggled to express himself and clearly the level flattens out, remains more superficial [Group leader].

Linguistic and cultural barrier when dealing with people who have a different language and culture [...] It seemed to me that the man who was supported by a volunteer and the other young man were in a bit of a bind. In my opinion, they could have said a lot more if they had been put in a position to do so [Public social services manager 2].

From the experience-based focus groups with the experts emerged dynamics typical of self-help, particularly information sharing, internal dialectics, we are in the same boat, mutual emotional support, strength in numbers (Steinberg, 2014).

I liked the meetings [...] because you also compare your situation with that of other people and understand, as in my case, that there are problems even more serious than yours, that anyway there are greater difficulties that belong to simple people [EBE 4].

He [EBE 5] gave me advice, he told me, «you are good, go ahead, don't quit your studies, get a job,» for me this sentence was important, it changed my mind, he has more experience than me [EBE 6].

Discussion

The following practical experience tested the participatory approach in a public social services technical committee, making possible to create equal and non-oppressive relationships among subjects belonging to different levels of the welfare system. According to the relational principle typical of Relational Social Work, social problems can be addressed by bringing together the professional knowledge and the experiential knowledge of those who experience a difficult condition (Folgheraiter & Raineri, 2017). In this experience it was applied to a higher level of local management and policy making because we work

with human existence at all levels of welfare, and it is from that existence that the most appropriate coping methods can be co-constructed (Folgheraiter & Raineri, 2017).

The methodological and ethical responsibility of social workers in promoting opportunities for user and citizen participation can be achieved in different ways. Social workers are relational when they use their voice to bring their experiences developed in the field-work to decision-makers, performing an advocacy function (Folgheraiter & Raineri, 2023). They can be even more relational by supporting self-advocacy, facilitating relationships between the technical expertise of policy makers and the experiential expertise of users, volunteers and citizens (Folgheraiter & Raineri, 2023).

Facilitating this direct relationship also means creating the conditions for all participants to be on an equal footing, each with their own role but all with the same status, in accordance with the relational social work methodology. Effective partnership can, in fact, be achieved only in a condition of equity among participants (Warren, 2007) and freedom of exchange. In this practical experience, it resulted in opening a public services technical committee to experts by experience, so that they could have a voice that was actively heard.

Members of the planning group, prompted by the action research, decided to write into their programme the possibility of evaluating the direct participation users service in their meetings. This gives hope that it will not remain a single experience, but may be repeated and may become a practice in the local planning system.

Interestingly, most of the experts by experience naturally understood the potential of combining experiential and technical-professional knowledge; accepting the participation proposal means recognizing themselves as competent interlocutors capable of expressing their own point of view (Krumer-Nevo, 2005). Service users brought competent contributions presented in a constructive manner; expressing sincere emotion, they wanted to make their voices heard.

However, some professionals were initially concerned about putting the experts by experience in an uncomfortable situation. This concern, while denoting sensitivity and care for the people involved, does not take into account the fact that they had consciously chosen to participate, had asked to be heard and discuss with the professionals. When guided by a traditional logic of aid and a stereotypical narrative of poverty, we risk to see people experiencing economic hardship as fragile, weak, and in need of protection, when in fact, as Krumer-Nevo argues, they are constantly enduring.

This experience has required some professions to de-construct the mindset typical of traditional aid, according to which it is possible to eliminate social problems through scientific knowledge, and reconstruct one's thinking from a counter-intuitive perspective.

In line with what has been said, it is important to consider it a dual-value learning process. Through experience, the experts have acquired information on the services and the welfare system, recognizing themselves as more aware, capable and competent citizens, thus increasing their empowerment and self-confidence. In fact, participation

in anti-oppressive practices helps to overcome the vicious cycle of discrimination and disadvantage of poor or poorly protected individuals; supporting the empowerment of users and citizens belonging to disadvantaged groups their sense of powerlessness can be challenged (Beresford & Hoban, 2005). The professionals of the planning group were trained to look at the service users in a different way, not only as beneficiaries of social interventions, but also as collaborators, as prosumers, an expression that well reconciles the meaning of consumer and co-producer (Folgheraiter, 2016).

Conclusions

From the above discussion, it is possible to identify recommendations for members of planning groups at local level. It is not enough to be predisposed to the involvement of users, but it is necessary to overcome the traditional view that service users are fragile and weak, recognising their resources. Only in this way can users be truly involved and considered competent actors in planning processes at local level.

In conclusion, this experimentation allowed service users to exercise critical and reflective skills with regard to the welfare system that assists them (Krumer-Nevo & Barak, 2006), according to the idea that feedback from users and sensitive citizens is necessary to plan territorial anti-poverty interventions. Participatory practices that promote a direct and close relationship between civil society and the welfare system go in the direction of developing an authentic welfare society perspective (Donati, 2015).

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