Some Effects of the Transition from Normalization to Social Role Valorization

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THE ORIGINAL NORMALIZATION CONCEPT founded by Niels Erik Bank-Mikkelsen as "letting the mentally retarded live as close to normal as possible" was established in Danish law in 1959 (Bank-Mikkelsen, 1980). It was later defined as the "normalization principle" by Bengt Nirje of Sweden (Nirje, 1969). Wolf Wolfensberger in North America reworked, systematized, sociologized and generalized the concept beyond mental retardation to virtually all types of human services (Wolfensberger, 1972), and eventually, in 1983, reconceptualized it as Social Role Valorization (Wolfensberger, 1983). Thus, both SRV and normalization in its most highly articulated form have the same major conceptualizer.

Others have written about the conceptual connection between normalization and Social Role Valorization (SRV), including the fact that SRV has roots in normalization as well as in the empiricism of fields such as sociology, psychology and education (e.g., Wolfensberger, 1984, 1985; Lemay, 1995; Osburn, 2006). Not often explained is some of the effects SRV had on normalization and, consequently, on many of its adherents. This paper is intended to describe some of these effects, at least in part. We begin with a bit of background relevant to both normalization and SRV.

A General Comment on the Importance of Normalization & Social Role Valorization

THILE THESE BODIES OF WORK are only two of Wolfensberger's many contributions, they are particularly outstanding. If an award were given for the single most important intellectual development in the field of human service in the past one hundred years, normalization and SRV would have to be two of the top contenders. In fact, recognitions along these lines were given. In a poll of mental retardation leaders, Wolfensberger's (1972) book on normalization was selected as the most influential book in the field since 1940 from among 11,330 books and articles, and his 1983 article introducing SRV (Wolfensberger, 1983) as the seventeenth most influential publication in the field (Heller, Spooner, Enright, Haney & Schilit, 1991). In 1999, Wolfensberger was selected by the National Historic Preservation Trust on Mental Retardation as one of 36 parties that had the most impact on mental retardation worldwide in the 20th century. Wolfensberger was identified in 2004 and again in 2008 in the ISI Web of Science database as the author of the most frequently-cited article in Mental Retardation (i.e., Wolfensberger, 1983), the journal of what was then the American Association on Mental Retardation, and is now the American Association on Intellectual and Devel-

opmental Disabilities.¹ In 2008, Wolfensberger's work on normalization and SRV was identified by Exceptional Parent Magazine as one of "the 7 wonders of the world of disabilities" (Hollingsworth & Apel, 2008). Besides these recognitions, much has also been written about: (a) the nature of SRV and its application to people who are socially and societally devalued due to impairment, age, poverty or other deviant conditions (see, for example, Wolfensberger, 1992, 1995, 1998, 2000, and especially, Wolfensberger & Thomas, 1983, 2007), (b) the importance of SRV (e.g., see Flynn & Lemay, 1999; Thomas, 1999; Kendrick, 1994), and (c) its relationship to normalization (e.g., see Lemay, 1995; Thomas, 1999; and Wolfensberger, 1983). What all of this partially-but clearly-attests is that a great many people have appreciated the importance of Wolfensberger's work. Many individuals and families are quite aware of how much they have benefitted from Wolfensberger's thinking and teaching, and some have even published testimonials to this effect (e.g., Duggan, 2010; Park, 1999).

Wolfensberger's The Principle of Normalization in Human Services (1972) and his companion work, the service quality evaluation tool Program Analysis of Service Systems, or PASS (Wolfensberger & Glenn, 1969, 1973, 1975), together extensively explicated normalization in terms of its implications to service provision. In doing so, they contributed decisively to an international wave of service change away from segregating mentally retarded people into institutions apart from typical society, and toward supporting their integration into normative community settings and activities. In addition to publishing, Wolfensberger also established a teaching culture to systematically disseminate the principle of normalization (mainly through PASS) to aspiring change agents, human service workers, family members and community leaders, via intensive lengthy training workshops given throughout North America and, to a lesser extent, Europe. Wolfensberger's highly articulated version of normalization became a foundation for

service training, practice, policy and legislation, particularly in North America and Great Britain, where normalization thinking fueled fundamental changes in patterns of service provision, though often explicit attribution of such changes to the principle of normalization were withheld (Kendrick, 1999; Race, 1999).

Yet, normalization was neither perfect nor universally welcomed. Particularly in its early years (the 1970s), there was enormous resistance to normalization, most often from people whose employment or professional status were dependent on maintaining the status quo, especially institutions, which by and large was inimical to the ideas and ideals espoused by normalization and PASS. This fact was certainly better known on a direct personal level among both supporters and resisters of normalization, though it was also documented in the literature (e.g., see Wolfensberger, 1980, 1999). Many individuals and organizations even fought normalization tooth and nail, motivated by their correct perception that normalization pointed to big changes in-and even an end to-the then-currently prevailing service models based on philosophies of social Darwinism, congregation, segregation, custody and non-development in which they were so heavily invested. Also, there were several schools of thought about how normalization was to be defined and what it actually should mean in practice. For instance, differing major versions of normalization were promoted by its "founding fathers," Niels Erik Bank-Mikkelsen of Denmark, Bengt Nirje of Sweden and Wolf Wolfensberger in North America. Further, there was also a large number of other idiosyncratic formulations (some of these are discussed in Wolfensberger, 1980). For better or worse, this plethora of opinions about what normalization is or should be led to both a lot of confusion, and to different people in different places interpreting and applying normalization in different ways, some of which were sharply at odds with one another. Many people dealt with the change implications of normalization not by changing their practice or service, but rather by continuing to do whatever

they had always been doing but simply calling it normalization-apparently convinced that whatever they were doing must be not only good but normal too. One big reason this particular type of distortion of normalization is not well documented in the literature is that few people who thusly misconstrued normalization published an account of doing so. (The authors' knowledge of this comes from our own first hand experiences in the dissemination of normalization, including the conduct of scores of evaluations of services that professed to be normalization-based.) Also, the term normalization itself was not especially helpful. It almost invited simplistic intuitive interpretations by a great many people, such that it meant primarily making people fully "normal." Many people offered normalization endorsements, critiques, demonstrations and even teaching sessions without themselves ever having had any training in the concept, or even taking recourse to the core normalization literature. Some people published criticisms of normalization that were notable mainly for displaying significant ignorance about what they were criticizing (see, for example, Branson & Miller, 1992; Wolfensberger, 1980; and Wolfensberger & Thomas, 1994). Altogether, there was much misinterpretation, disagreement and even cynical manipulation of the idea.

However, all of this also had at least one very positive effect. It led Wolfensberger to engage in an ongoing effort to further develop and clarify normalization (Osburn, 2006). This effort extended into the early 1980s. Wolfensberger generated several progressively more advanced versions of his own original version of normalization, each successive one more fully articulated, more precisely defined, and more clearly nuanced. In turn, this conceptual work enabled Wolfensberger to generate deeper understanding and insights that eventually went beyond normalization, drew closer to what might be called the nub of the matter, and ultimately blossomed into a new theory, deeply rooted in normalization, but also clearly different and more advanced. Drawing on some French language practices, he called this new conceptualization Social Role Valorization (Wolfensberger, 1983, 1984, 1985), reflecting its core proposition that valued social roles are the key to promoting "the good things in life" (Wolfensberger, Thomas & Caruso, 1996) for people at risk of being devalued in their society.

As conceived and taught by Wolfensberger, SRV is a fairly straightforward yet complex theory that unifies manifold elements of empirical knowledge-including that gained from the creation and practice of normalization-into an overall coherent approach to service and social interactions. SRV generates nearly unlimited positive implications for actions to support valuation of the social roles of vulnerable people, both as a means to gain access to "the good things in life" and to offer them relief and protection from having bad things done to them which they otherwise would almost inevitably experience, sometimes to an extreme degree (as detailed in Wolfensberger's two-to-four day SRV training packages between the early-1980s and 2005, and partly in Wolfensberger, 1998).

SRV has been extensively disseminated via training workshops, and many key publications (Wolfensberger, 1983, 1984, 1985, 1991a, 1991b, 1991c, 1991d, 1992, 1995, 1998, 2000; Wolfensberger & Thomas, 1983, 2007). By circa the late-1980s, Social Role Valorization had largely superseded normalization in North America, to the point that by the early 1990s, normalization was hardly being taught there at all anymore. SRV has also been widely disseminated in Australia where an SRV training culture evolved, and to some extent in Europe. However, to our knowledge, the teaching of SRV in Europe (with the partial exception of Britain) has not been as systematic as in North America and Australia.

Some Effects of Social Role Valorization on the Normalization Training Culture

TION had a profound impact on the major teachers, trainers, thinkers and disseminators in the normalization movement and training

culture from which it arose. It presented them with a major and life-changing point of decision. Broadly speaking, their attitudes toward this new thing called Social Role Valorization tended to sort themselves out into four different patterns of response, with some overlap among these.

One pattern was to embrace SRV. Many people (the authors included) who had previously been strongly invested in normalization and PASS simply left these behind and made a full, almost seamless, transition into SRV and PASSING (Wolfensberger & Thomas, 1983), the SRV-based successor instrument to PASS. Perhaps some did so because they clearly and quickly recognized the superior conceptualization of SRV over normalization. However, frankly, it is likely that trust in Wolfensberger's scholarly judgement and moral leadership was the major factor in their decision. In other words, Wolfensberger saying SRV is superior to normalization carried enormous weight, and would have strongly predisposed many "normalization" people to accept SRV even before they had a chance to thoroughly learn and judge it for themselves. Either way, their decision required them to make a significant personal commitment, as well as to rethink and re-tool their former normalization-based roles. Of course, not everyone who made the transition to SRV more than a quarter-century ago stayed with it over the years: some of them eventually moved on from SRV as well, not always leaving it behind entirely, but using it as a foundation for different endeavors in which SRV per se was less prominent or less acknowledged or perhaps given no role at all, sometimes in favor of some more recent service trend or even craze. However, other individuals (again, including the authors), made careers out of disseminating SRV and PASSING in their roles as consultants, teachers, trainers, administrators, planners, evaluators and so on. Some have also been long-standing members or correspondents of the (North American) SRV Development, Training & Safeguarding Council (see Thomas, 1994), or otherwise have remained closely allied

to the work of Wolfensberger and (since 1973) his Syracuse University Training Institute for Human Service Planning, Leadership & Change Agentry.

In part, through their efforts, the SRV movement and training culture steadily-albeit slowlycontinues to gain prominence and numbers; conversely, as noted earlier, normalization's following and training rapidly dwindled, to the point of near-complete disappearance in North America. Few participants in SRV training events since the mid-1990s report any awareness of normalization. Thus, in some ways, it proved easier for them to learn and accept SRV than it did for many others who were dazzled by the advent of normalization, and formed strong allegiance to, and knowledge of, it. The SRV dissemination effort in Australia is a good example of this: it is a country where, since the early 1980s, SRV took hold and spread rapidly in large part because Australia had not yet embraced the normalization principle.

A second type of response was that some normalization leaders spurned SRV and chose instead to stay with normalization, some doggedly so over the years, in spite of the advent of SRV. There seem to have been a variety of reasons for this. First, leaving normalization behind and moving on to SRV entailed a significant intellectual commitment, in terms of an effort to learn and become proficient in something new, a commitment which some seemed unwilling to make. Relatedly, adopting SRV may have been perceived as an undesirable identity-threatening role change by individuals who had successful and rewarding career roles built upon dissemination of normalization. Also, simply moving out of one's comfort zone might have exacted too high a toll both emotionally and physically for some. In addition to the required exertion of mental capital, an outlay of finances would often also be entailed, such as for tuition and travel-related expenses of attending SRV training, or for acquisition of new SRV resources and materials, and so on, which some people chose not to do even if they could afford it. Another likely reason was that loyalties people had

developed to one or more normalization leaders other than Wolfensberger may have caused some people to feel that adopting SRV would be a form of betrayal to them. Others sincerely believed that nothing could be better than normalization. Yet others were not convinced SRV was sufficiently different from, or advanced over, normalization. And, finally, some believed that SRV lacked a heart and soul because it is entirely empirical, unlike normalization which was partly empirical, but also ideological; for instance, there was a lot of talk about "values" in normalization, and this was one of the main things so many people found so "good" about it (see Elks, 1994). In actuality, there is also a lot of talk about "values" in SRV, but in a different way, in that they come into play in regard to any decisions a person makes about employing the empirical insights of SRV.

In some places, this "holding on to normalization" response has fairly effectively (if not purposively) kept SRV off the scene. A case in point is in the Scandinavian countries, where normalization was born, where it became and remains deeply embedded in the culture and the social welfare state (Ericsson, 1985; Meyer, 2004), and where there are explicitly normalization-based laws, program operations and governmental policies, and where there is hardly any evidence of inroads by SRV, or even knowledge of it.

A third type of response can be characterized as reticence or ambivalence by those who neither fully abandoned normalization nor fully embraced SRV. There are several understandable reasons for this, such as some of the same ones noted above. Likewise, some reticence and ambivalence are inherent in all transitional processes. A related factor is that Wolfensberger's normalization teaching began to place increasing emphasis on the importance of vulnerable people having valued social roles (Wolfensberger & Tullman, 1982). In a relatively short period of time, circa late-1979 to early-1980, the new concept actually became fully developed. However, because it had not yet been given a new name, it was being taught—again, for

a brief period–under the old normalization rubric. By the time the name "Social Role Valorization" was chosen sometime in mid to late-1982, the first published edition of PASSING (Wolfensberger & Thomas, 1983) was already being printed. Thus, while PASSING contained the most extensive written explication of SRV up to that time, it still referred to it as "normalization" because it was too late to change it once the book was in-press. The 2007 revised edition of PASSING corrected that problem. However, from 1983 until 2007, there existed the slightly awkward situation of teaching and evaluating SRV service quality via a PASSING manual that made no reference to SRV but only to normalization. That problem was effectively dealt with by simply asking PASSING users to mentally substitute "Social Role Valorization" wherever they read "normalization." This they could quite easily do because all had previously attended at least one Introductory SRV training event. Still, this semantic condition may have accounted in part for prolonging a transition from normalization to SRV in some areas and for some people.

A prime example of ambivalence toward full acceptance of SRV occurred in the United Kingdom, where the transition away from normalization has been much more prolonged than in North America, and is still not complete. Normalization and PASS workshops continued to be taught there much longer than in North America, and many people there still seem to think more in terms of normalization than Social Role Valorization. An example is the description of a forensic service for mentally retarded criminal offenders in Britain by Fish and Lobley (2001) that, as late as 2001, is still based on the principle of normalization and on the "five accomplishments" that are themselves based on the principle of normalization (O'Brien & Lyle, 1987). While SRV and PASSING training was imported into the UK from abroad on a few ad hoc occasions, this effort was not consistently sustained. At the same time, there was no corresponding effort by British normalization and

PASS teachers to concertedly study and learn SRV and PASSING in sufficient depth to gain teaching mastery of it. In consequence, hardly any SRV or PASSING events-qua SRV and PASSING-were taught there over the past 20 years or so. Instead, the training that did take place commonly conflated normalization and SRV, as well as PASS and PASSING. These were commonly referred to as "normalization/SRV" and "PASS[ING]" (Race, 1999) as if these were interchangeable terms, and as if they were not different things. (See also Race, 2007 for a general discussion of effects of normalization and SRV in the United Kingdom.) Eventually, the frequency of even this type of training waned. However, in 2007, a small group (called VERA, for "Values, Education and Research Association") formed in Britain to engage in efforts to build interest and capacity in both SRV and PASSING; it has conducted both SRV and PASSING training there.²

Perhaps some of this reticence or ambivalence could have been overcome in favor of SRV if leading SRV disseminators in North America had provided even stronger assertions and clarifications of the differences between SRV and normalization, or stronger rationales why normalization/PASS teachers should make a transition to SRV/PASS-ING, or more convincing demonstrations of the theoretical and practical superiority of SRV over normalization. However, this speculative hindsight does not account for continued ambivalence in the face of a quarter century of experience with SRV, nearly constant regular publication on SRV topics, and the availability of open access to multiple training workshops each year. As mentioned, this is in contrast to Australia where there had been little prior history of normalization training to encumber understanding and siphon off enthusiasm for SRV.

A *fourth* pattern of response among old normalization hands, one related to the third, was to promote the key ideas of both normalization and SRV in ways other than by conducting normalization

malization or SRV training per se. For instance, a few normalization/PASS leaders taught and wrote about principles of service that were in essence strikingly similar to SRV and/or normalization which, however, they called by other names. At least one of these, the Framework for Accomplishment schema (O'Brien & Lyle, 1987), is fairly comprehensive and explicated, and continues to have currency with some people, as noted earlier. The authors are clear that it is not a substitute for either normalization or SRV, but rather an alternative way of disseminating, interpreting or translating the main ideas thereof. Similarly, a number of leading disseminators began to specialize in various forms of change agentry using normalization and SRV as their knowledge base, along with other intellectual tools in their kits, many of which were independent of normalization and SRV, and some of which had also been taught to them by Wolfensberger. Their change agentry efforts were often directed at individuals and families, working on a person-by-person basis. A fairly widespread example of this was those who conducted, or trained others to conduct, "personal futures planning" in one or more of its many variants as a way of bringing SRV and normalization principles to bear on the process of structuring positive goals and attaining desired outcomes for devalued people (see, for example, Mount, 1992, and Mount & Wheeler, 1991). Others tended to direct their work more at the level of service agencies, for instance by promulgating strategies and techniques for organization-based implementation of normalization and SRV. A few operated, at least some of the time, at the even broader levels of service systems, or regional and national governments.

The fact that certain of these efforts have drawn and retained over many years the dedication of a considerable number of well-informed, creative people in our field signifies that they have merit. A number of these individuals would properly be thought of as leading practitioners, people who have demonstrated their capacities for leadership and influence among service providers, recipients

and families. They have been, either at times or habitually, in the forefront of formulating and demonstrating innovative service efforts and approaches, including some that others have called "best practices." Some have conceptualized, developed and nurtured viable worthwhile projects aimed at enriching lives that might otherwise remain restricted in such domains of community living as abode, advocacy, family and relationships, employment, education, worship, sports and recreation, and thus have much to be commended for. Some have published instructive accounts of their perspectives and works. (For only a few North American examples, see: Kendrick, 2001; Mount, 1992; O'Brien & O'Brien, 1990; Pierpont, 1992; Wetherow, 2003.) Further, the greater proportion of this work has been done outside the publication world, via training, speaking and consulting; therefore, certain people are not aware of it, much as certain people are not aware of the corpus of published work.

Relatedly, some practitioners are closer to, and more simpatico with, SRV than others. For example, some have solid backgrounds in normalization (even if not necessarily also in SRV), and though they may not be SRV boosters, they display a certain degree of concordance with it. And, they seem to have an appreciation of SRV, even if they do not express that appreciation explicitly or consistently, or always explain how their teaching derived from, or is related to, SRV. Further, because of the influence that normalization and SRV ideas have had on them, it may also be true that the perspectives or practices they tend to promote are ones that are more clearly congruent with SRV than with normalization, especially since many of them at least implicitly recognize and promote the importance of valued social roles, even if they do not mention SRV (see, for example, Harlan-Simmons, Holtz, Todd & Mooney, 2001).

Systemically, the development of a variety of specialties within a broad field of service (such as law, architecture, medicine, etc.) is an understandable and, arguably, desirable dynamic. In fact, a

natural outgrowth of most high-level schemas or theories is a desire to find the best ways to apply the general principle to specific circumstances. Some such specialization had actually begun in the normalization era, as when some people focused not on normalization as a whole, but rather on pieces of it, such as a narrow emphasis on normalizing the physical environment, reducing congregation, pursuing culture-appropriate rights or greater autonomy, achieving age-appropriate attire, normalized eating and meal-time practices, or pursuing what they think is image-enhancing language practice. Such specialization seemed to burgeon more so during the 1980s phase of transition from normalization and PASS to SRV and PASSING. No doubt some so-called "best practices" (Osburn, Caruso & Wolfensberger, 2010) in mental retardation were born out of efforts on the part of some individuals to specialize in carrying some element or component of SRV theory into implementive reality (Caruso & Osburn, 2010).

However, these things are not true of other practitioners, such as those whose "best practice" may be derived from normalization and SRV, but whose grounding in these ideas may be nonexistent or weak. Some of these may harbor confusions, distortions or antipathies toward SRV. Some may engage in a kind of calculated distancing and dissociation of SRV from their "best practice." Some have explained that a motivation for their not openly seeming to endorse-or even reference-SRV, and instead using terms such as "best practice," is to avoid any taint or "stigma" they believed to be associated with normalization or SRV, e.g., of "zealotry," "pedantry," "selfrighteousness," "dreamy impracticality," what one imperious director of a corporate human service called, "pompous naiveté," or even religiosity. Another motivation (occasionally expressed, but usually left unsaid) was that by not acknowledging SRV, one could avoid appearing to be aligned with its implied critique of many prevailing human service practices. Ironically, this would be an inescapable consideration for anyone whose "best

practice" was primarily supported by those who were presently vested in the status quo. Another less-openly expressed (and possibly unconscious) motivation was that dealing with only pieces of SRV is simply easier: it avoids (up to a point at least) the inherent challenges involved in dealing with-and helping others to deal with-a unified complex and demanding theory. And, frankly, another motivation was a certain degree of reluctance to be seen as too closely associated with Wolfensberger, for two reasons. One was that it increased their own chances of being rejected by a constituency they wanted to reach which perceived him as "too radical" or even "a little crazy." (Some of those people have never forgiven Wolfensberger for undermining the old way of doing things.) The other was that they sought simply to establish themselves fully in their own right, and to escape from beneath the long shadow of the master, moving on from the role of "disciple," "acolyte," "apprentice" or "journeyman."

Conclusion

HATEVER EFFECTS THE TRANSITION from normalization to SRV had on individual people, SRV itself has continued to grow in terms of theoretical development, teaching and practice. It has been more widely disseminated than normalization had been before it, though by no means universally so. As a theory relevant to human service, SRV has attained intellectual eminence primarily in mental retardation and so-called developmental disabilities services. It has made some inroads into other service fields, as repeatedly borne out at various national and international gatherings on Social Role Valorization. For instance, at the 4th International SRV Conference in Ottawa, May 2007, on "Crafting Valued Social Roles," professionals from more than a dozen countries presented their applications of SRV in services to elderly people, prisoners, the poor, newborns, aboriginal peoples and so on. Thus, SRV is recognized within at least certain circles beyond mental retardation, though

nowhere near to the extent it deserves. This is especially true in mental services, where drug and talk therapies are such powerfully entrenched and dominant service paradigms that they present enormous obstacles to inroads by SRV on professional, academic and systemic levels. On the one hand, few mental health professionals are familiar with the corpus of SRV literature, or have attended SRV training, or have sought to introduce SRV into their services. On the other hand, few major SRV disseminators seem to have developed clear strategies and active approaches for enlarging the presence of SRV in the mental health field. Still, SRV has gained some acceptance among a few community mental heath advocates, rightsoriented "consumer" advocates, service practitioners and individual service recipients (see, for example, Kendrick, 1997, 1999; MacNeil, 2007; and Sangster, 2007). Such occasional glimpses indicate at least a drop-in-the-bucket degree of SRV presence, which, though it cannot yet be called encouraging, does point to the possibility of a long-term grassroots approach that would eventually broaden the acceptance of SRV in the sphere of mental services. Meanwhile, the expansion of SRV application in other service fields beyond mental retardation will continue to demonstrate its potential for enabling an experience of the good things in life for devalued people in very diverse circumstances and conditions. Perhaps the much-needed large-scale transfer of SRV theory and practice to many other fields will be the next major transition.

ENDNOTES

- 1. Personal communication, 21 July 2008, from William E. MacLean, Jr.
- 2. David Race, personal communication, 5 October 2010.

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