

# Medicare and Pediticare: A Fantastic Strategy That Never Matured

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**Abstract:** This article surveys the life and work of Wilbur Cohen, an architect of and behind-the-scenes actor in War on Poverty legislation and politics. It focuses specifically on his mastery of the incrementalist approach to policy goals, the quantitative foundation of his work, and his dual role as policy developer and professor which formed his practitioner-academic approach to knowledge and activism during a pivotal point in American history.

**Keywords:** Wilbur Cohen, Medicare, Pediticare, War on Poverty, public policy, incrementalism

Wilbur Cohen was a man of the ages; a son of Jewish immigrants who was passionately committed to creating a floor of security for all Americans. By way of introduction to the man and his work, let us reflect briefly on a sketch from Edward Berkowitz's (1995) biography of Cohen, *Mr. Social Security*:

JFK tagged him "Mr. Social Security." LBJ praised him as the "planner, architect, builder and repairman on every major piece of social legislation [since 1935]." The *New York Times* called him "one of the country's foremost technicians in public welfare." *Time* portrayed him as a man of "boundless energy, infectious enthusiasm, and a drive for action." His name was Wilbur Cohen.

For half a century, from the New Deal through the Great Society, Cohen (1913-1987) was one of the key players in the creation and expansion of the American welfare state. From the Social Security Act of 1935, to the establishment of disability insurance in 1956 and the creation of Medicare in 1965, he was a leading articulator and advocate of an expanding Social Security system. He played that role so well that he prompted Senator Paul Douglas's wry comment that "an expert on Social Security is a person who knows Wilbur Cohen's telephone number."

The son of Jewish immigrants, Cohen left his Milwaukee home in the early 1930s to attend the University of Wisconsin and never looked back. Filled with a great thirst for knowledge and wider horizons, he followed his mentors Edwin Witte and Arthur Altmeyer to Washington, D.C., and began a career that would eventually land him a top position in LBJ's cabinet as Secretary of Health, Education, and Welfare.

Various described as a practical visionary, an

action intellectual, a consummate bureaucrat, and a relentless incrementalist, Cohen was a master behind-the-scenes player who turned legislative compromise into an art form. He inhabited a world in which the passage of legislation was the ultimate reward. Driven by his progressive vision, he time and again persuaded legislators on both sides of the aisle to introduce and support expansive social programs. Like a shuttle in a loom he moved invisibly back and forth, back and forth, until the finely woven legislative cloth emerged before the public's eye.

Nearly a decade after his death, Cohen and his legacy continue to shadow the debates over social welfare and health care reform. While Congress swings with the prevailing winds in these debates, Social Security's prominence in American life remains vitally intact. And Wilbur Cohen is largely responsible for that.

We gain a further sense of the breadth and length – and the continued reach – of his work in his *New York Times* (1987) obituary:

Mr. Cohen went to Washington in 1934...and helped to draft the Social Security Act of 1935. He became the first employee of the Social Security Administration and a central figure in a 30-year quest for a national health insurance plan. A first move in that direction had led nowhere as far back as President Theodore Roosevelt's time. President Franklin Delano Roosevelt hoped to wrap it into his Social Security package but feared that this might doom the whole program on Capitol Hill.

Mr. Cohen shaped the national health bill submitted by President Truman in 1952, again without success. He remained with the Social Security Administration until 1956, taught at the University of Michigan for four years as a

professor of public welfare administration and was brought back to the capital by President John F. Kennedy.

Named Assistant Secretary of Health, Education and Welfare, Mr. Cohen barely received Senate confirmation because his reputation as a social reformer aroused strong resistance from conservatives.

Mr. Cohen put his imprint on every important piece of social welfare legislation Presidents Kennedy and Johnson fielded under the New Frontier and Great Society labels. A quarter-century of experience by then made him the chief strategist and expert the government had in that field.

Medicare made little progress at first as Congress turned it back repeatedly. Only after President Lyndon B. Johnson's landslide of 1964 did Medicare pass, as did dozens of other proposals designed by Mr. Cohen.

Mr. Johnson rewarded him with a promotion to Secretary in 1968, and Mr. Cohen remained an activist to the final hours of the Johnson Administration.

He returned to the University of Michigan in 1969 as professor and dean of its School of Education. But he insisted on being given top-level assistants to allow him to roam the country in the pursuit of social justice, as he saw it.

### **Cohen's Incrementalist Influence on the War on Poverty**

It is Cohen's "incrementalist" approach that we wish to highlight in this reflection – something that could have been of immense policy importance but is little, if at all, known in America today. In political science and public policy, *incrementalism* is the implementation of a goal via a series of small, planned steps rather than a few large leaps. Cohen was a master of incrementalism.

But let us start a little earlier. I arrived at the University of Michigan in the fall of 1963. I came to know of Wilbur from his time as a professor at the

University of Michigan School of Social Work (1956 to 1961) and later knew him as dean of the School of Education (1969 to 1977).

Wilbur was a passionate professor, a social activist rather than a scholar as such, an early example of the *pracademic*, or practitioner-academic. Although he appreciated data, he viewed it from a policy, rather than an explanatory, perspective. This perspective was evident when, while at the University of Michigan, he co-authored with James Morgan – then at the University of Michigan's Survey Research Center – Martin David, and Harvey Brazer, a volume titled *Income and Welfare in the United States* (Morgan, Cohen, David, & Brazer, 1962). Based on more than 3,000 interviews conducted by the University of Michigan's Survey Research Center, the book used original datasets and quantitative analysis to discuss, among other topics, determinants of family income, conditions of the low-income population, dynamics of social and economic change, and attitudes toward education.

Together with Harrington's (1962) *The Other America*, Cohen's *Income and Welfare in the United States* was the subject of a 13,000-word *New Yorker* review by Dwight Macdonald – the longest the magazine had ever published. Mr. Macdonald did not like *Income and Welfare*. He gave Harrington high marks but Cohen and colleagues a very bad review, going beyond even the book to tarnish the authors' scholarship. It is clear that Mr. Macdonald knew nothing about social science research or the author's scholarship, nor did he take the time to find out anything about either. But he did not let that stop him from negative dumping:

*Income and Welfare in the United States* differs from the other works reviewed here in length (531 big pages) and in being the result of original research; 2,800 families were interviewed "in depth." I must confess that, aside from a few interesting bits of data, I got almost nothing out of it. I assume the authors think poverty is still an important social problem, else why would they have gone to all this labor, but I'm not at all sure what their general conclusions are; maybe there aren't supposed to be any, in the best tradition of American scholarship. Their book is one of those behemoths of collective research financed by a foundation (in this case, largely by Ford) that daunt

the stoutest-hearted lay reader (in this case, me). Based on “a multi-stage area probability sample that gives equal chance of selection to all non-institutional dwelling units in the conterminous United States [and that] was clustered geographically at each stage and stratified with interlaced controls,” it is a specimen of what Charles Lamb called *biblia-abiblia* – things that have the outward appearance of books but are not books, since they cannot be read. Methodologically, it employs something called the “multivariate analysis,” which is explained in Appendix E. Typographically, Appendix E looks like language, but it turns out to be strewn with booby traps, all doubtless well known in the trade, like “dummy variables,” “F ratios,” “regression coefficients,” “beta coefficients” (and “partial beta coefficients”), and two kinds of “standard deviations” – “of explanatory variable A” and “of the dependent variable.”

Some concurred with Macdonald. Writing in *International Social Work*, Lynes (1963) also reviewed together Harrington’s *Other America* and Cohen and colleagues’ *Income and Welfare*. Harrington, he concluded, “used facts as an artist uses paint, to create a picture; and where personal impressions are more colorful than statistics, he does not hesitate to use them” (p. 51). Harrington should be required reading for every sociology student, Lynes observes – and then laments that students are “more likely to find *Income and Welfare in the United States* on their reading lists” (p. 51). His review lambasts the “impersonal” approach and “impenetrable” style of *Income and Welfare*, contrasting it with Harrington’s secondary-sourced *Other America* and unconvinced that “in the present instance the loss of comprehensibility is justified by the quality of the results achieved” (p. 51).

Others, writing from a more academic perspective, nevertheless judged that the work provided little new information. “Out of an enormous amount of manipulation of data, little new emerges...No policy emerges unless it is that of greater equality of opportunity for education in order to minimize the intergenerational transfer of low-income status” (Reid, 1963).

However, Macdonald’s observations were not the

only response to Cohen and his colleagues. From the Brookings Institution, Alice Rivlin wrote:

[The authors] have collaborated to produce...an important book. Here for the first time the full power of multivariate analysis applied to a well-designed national sample survey has been used to find answers to basic questions [about households and demography in America]. The book is well organized and clearly presented, which is remarkable considering that it had four authors. It should be valuable not only to the economist and the sociologist, but also to that mythical reader, the well-educated layman...While one might quarrel with the details and one might wish the authors had carried the analysis further at some points, it is a fine piece of work and deserves to be widely and carefully read (Rivlin, 1963).

Her assessment was echoed by others, among them Caslon (1964) in a review of three volumes addressing the question of economic security in America. As he explains, *Income and Social Change* (Titmuss, 1962) did not attempt to “replace the discredited data on income distribution with estimates of true family disposable income or analyze the bases on which distribution of income rests” (p. 253). Cohen and colleagues, Caslon continues, have produced a more satisfying work. They “analyze the factors influencing the distribution of welfare and the process of change itself,” concentrating on quantifying and analyzing the importance and effects of varied factors (Caslon, 1964, p. 253).

Although less than evenhanded, Macdonald’s review, especially the portion on *The Other America*, was widely influential and credited in large part with kick-starting the War on Poverty. This focus on poverty had emerged in nascent form as President John F. Kennedy’s President’s Committee on Juvenile Delinquency and Youth Crime (Kennedy, 1961).

Jill Lapore, also a *New Yorker* writer and Harvard professor, commented on Macdonald’s review and its impact in her *Smithsonian* article (2012), observing that Macdonald’s evocative prose used *The Other America* as a call to action. She had little use for the other two books in the review, commenting that Macdonald’s “Our Invisible Poor” used “a slew” of other titles (only two; hardly a slew) along with a series of economic reports, to demonstrate his claims.

Contrary to the naysayers, I have found Cohen's *Income and Welfare* very useful over the years when using it in doctoral and advanced masters classes. What is missing from the unflattering contemporary reviews, which we can now see from the perspective of distance, is that *Income and Welfare in the United States* was an absolute game changer regarding the systematic collection of social science data (as opposed to descriptive census data) and a careful analysis of those data. One outworking of the book's approach to data collection and analysis was the evaluation tool designed to assess President Johnson's War on Poverty programs: In 1966 and 1967, the Office of Economic Opportunity implemented an early version of the Panel Study of Income Dynamics. In 1968, the University of Michigan's Survey Research Center developed and launched a longitudinal version of the Panel Study of Income Dynamics under the direction of Cohen's colleague and co-author, James Morgan. It continues today at the University of Michigan's Institute for Social Research as the world's longest longitudinal study of household dynamics (PSID, 2015).

### **Cohen's Incrementalist Influence on Medicare**

Wilbur Cohen was one of the principal movers behind the construction and passage of the Social Security Act itself. Subsequently, as secretary of Health, Education, and Welfare, he championed Titles 18 and 19, Medicare and Medicaid. A detailed treatment of this effort can be found in Harris' (1966) *A Sacred Trust*.

During the 1960s, 70s, and 80s, I had the opportunity for many conversations with Wilbur, and we became academic friends and occasional collaborators. He wrote the forward to *Strategic Perspectives on Social Policy* – an anthology developed by Tropman, Dluhy, Lind, Vasey, and Croxton (Cohen, 1976, p. xi). Here is what he said:

### **FOREWORD**

*I have been involved in social policy for some 40 years, and I find it fascinating, changing, elusive, and volatile.*

*My experiences in social policy formulation have evolved from my roles as student, civil servant, parent, and taxpayer, professor to political*

*appointee and back to professor, observer, and citizen. I marvel at the many different ways by which social policy may be perceived, interpreted, and criticized.*

*I welcome, therefore, this stimulating and wide-ranging collection of readings, which my colleagues – Professors Tropman, Dluhy, Lind, Vasey, and Croxton have assembled.*

*There is the frequently told story about the man who realized one day that he had been reading, writing, and speaking prose all his life. His self-image improved remarkably with this new knowledge. It changed his whole life.*

*Similarly, it has been astounding to some people to find out that they have been deeply involved in the formulation of social policy. For the human kind, social policy is as pervasive and essential as breathing air. Men cannot live without creating, influencing, and utilizing social policy.*

*New and changing social policies are in the making for the decade of the 1970s. This volume of readings is a welcome addition, which should help to gain new insights into social policy processes, analysis, and implication.*

*Wilbur J. Cohen  
Professor of Education The University of  
Michigan,  
U.S. Secretary of Health, Education, and Welfare,  
1968*

He also contributed a chapter, "What Every Social Worker Should Know About Political Action," to that volume. In his chapter, he outlined the complex process of an incremental approach to political action, of which he was a master. Here are his steps:

1. Idea: The proposed solution or action.
2. Legislative Proposal: The legislative document prepared for the appropriate group of decision makers.
3. Period of Conflict and Public Debate: Public discussion in the form of focus groups, press articles, speeches, etc.
4. Development of Alliances: Building support among

relevant policy elites and organizations.

5. Period of Legislative Debate: Hearings within the legislative (or other decision-making) body, front room and back room discussion.

6. Enactment of Legislation: The vote on the proposal.

7. Funding of Legislation: Appropriation that enables the legislation to be carried out.

While items 6 and 7 are not listed as specific phases, he discusses them in his chapter, so I include them here. (However, we should note that Wilbur ends too soon. After a piece of legislation is passed and funds are appropriated, operating guidelines known as Federal Regulations are developed. These have their own steps in the legislative process.)

As noted, Wilbur was an incrementalist. He believed that successful transformational change (of the system) occurred through the accretion of transactional changes over time (change within the system). His underlying practice theory I called the “Fuller Brush Man approach to social policy.” For those encountering this American idiom for the first time, it refers to the door-to-door sales technique of the Fuller brush salesman (and later, saleswoman). The idea was that you do not sell much standing on the stoop. You have got to get your foot in the door, and then get yourself into the house. Once inside you do much better.

That was why his four-part Medicare/Pediticare plan was so interesting to me, even though only one part succeeded. He proposed:

Part 1: Medicare, or medical care for people over age 65.

Part 2: Pediticare, or medical care for children under age 5.

Part 3: Broader accessibility, or gradually lowering the age of Medicare eligibility. This proposal continues to emerge, decades after Cohen suggested it (Sanger-Katz, 2016).

Part 4: Broader Pediticare accessibility or, as children aged they would drag their eligibility along.

He suggested that, in its first year, Pediticare should apply to children under age 5; the next year it should be available to children under 6, and so on. According to Cohen’s plan, when the two ages met America would have (had) a national health plan.

Under President Lyndon B. Johnson, Cohen successfully headed a lobbying effort to pass Medicare, which the president signed into law on July 30, 1965. He also assisted in passage of the Economic Opportunity Act of 1964 and the Elementary Education Act of 1965. Johnson rewarded Cohen by promoting him to undersecretary of Health, Education, and Welfare (HEW), a post Cohen assumed on June 1, 1965. His work centered on the implementation of Medicare and Medicaid and the passage of additional Great Society legislation. Early in 1968 HEW secretary John Gardner left his post, and Cohen became the acting secretary. After Johnson’s March 1968 announcement that he would not seek re-election, he appointed Cohen secretary of HEW, and Cohen served until January 20, 1969. As secretary, he continued to push for passage of additional Great Society legislation. Further, he advocated for, but failed to convince Congress to pass, the expansion of Medicare to cover infants and young children (Berkowitz, 2000).

### **The Final Boarding Process**

In 1969, following the conclusion of the Johnson administration, Wilbur returned to the University of Michigan as dean of the School of Education. There he continually lobbied for positive social programs. It was not a great appointment, however. Wilbur was a national thought leader, and he worked on the national stage. He really did not need to be bogged down with running an education school – it was not, actually, his areas of expertise. I have no knowledge of what the university administration was thinking when it engaged him. In my judgment, however, an appointment that better suited him would have been University Professor of Health, Education and Welfare Policy, with affiliations to the schools of Education, Public Health, and Social Work and the then-small Institute of Public Policy Studies (later the Gerald R. Ford School of Public Policy).

He continued as an activist to the end of his career. This included traveling to a May 1987 gerontology conference in Korea. We agreed to talk more about the

Medicare/Medicaid plan when he returned: His interest was still percolating, and he had ideas for a fresh approach that repackaged the components and incorporated new political strategies. He died during that trip, and I never found out what they were.

Had he lived, and had his incrementalist approach taken root in healthcare and other social welfare issues, who knows what American social policy might be like today?

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