

Measuring Mobility from Poverty

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This paper is a collaboration among the US Partnership on Mobility from Poverty (the Partnership); researchers from Stanford SPARQ, a “do tank” that partners with organizations to solve problems by applying social psychological principles; and the Urban Institute. The views expressed in the paper are those of the authors and do not necessarily reflect those of the Partnership or its members, Stanford SPARQ, or the Urban Institute.

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ABOUT THE US PARTNERSHIP ON MOBILITY FROM POVERTY

With funding from the Bill & Melinda Gates Foundation, the Urban Institute is supporting the US Partnership on Mobility from Poverty. Led by chair David Ellwood and executive director Nisha Patel, the Partnership consists of 24 leading voices representing academia, practice, the faith community, philanthropy, and the private sector.

The Partnership’s definition of mobility has three core principles: economic success, power and autonomy, and being valued in community. Our collective aspiration is that all people achieve a reasonable standard of living with the dignity that comes from having power over their lives and being engaged in and valued by their community.



ABOUT STANFORD SPARQ

SPARQ is a Stanford Psychology “do tank” that partners with organizations to reduce disparities in criminal justice, economic mobility, education, and health.



ABOUT THE URBAN INSTITUTE

The nonprofit Urban Institute is a leading research organization dedicated to developing evidence-based insights that improve people’s lives and strengthen communities. For 50 years, Urban has been the trusted source for rigorous analysis of complex social and economic issues; strategic advice to policymakers, philanthropists, and practitioners; and new, promising ideas that expand opportunities for all. Our work inspires effective decisions that advance fairness and enhance the well-being of people and places.

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Introduction

What would it take to dramatically increase mobility from poverty?

To answer this question, the US Partnership on Mobility from Poverty gathered a range of insights from research, practice, and people who have experienced poverty. With funding from the Bill & Melinda Gates Foundation, staffing from the Urban Institute, and contributors with diverse perspectives, the Partnership took a comprehensive approach to understanding mobility from poverty. The Partnership not only debated critical issues, but also held site visits and gatherings in very different places to include viewpoints from urban, suburban, rural, and tribal communities.

Poverty is not just about a lack of money. It's about a lack of power.
—john powell, Partnership member

A key insight from the Partnership's efforts is the need to rethink how we define mobility from poverty. Although measures of economic success such as income and assets are foundational to upward mobility, they do not fully capture people's experiences. If we focus narrowly on income, for example, helping people move one dollar above the poverty level would appear to be a success. Yet the individuals and families who achieved this milestone would likely continue to struggle.

Just as important as material wealth are power and autonomy—people's sense of control over the trajectory of their lives—and being valued in community—their sense of belonging. Thus, the Partnership's definition of mobility comprises three core principles: economic success, power and autonomy, and being valued in community. This paper curates and describes selected measures of these three principles. In an accompanying website (forthcoming) we provide more instruments for measuring these principles along with information about their history and when and how to use them.

Many philanthropies, government agencies, service providers, researchers, and evaluators are familiar with standard measures of **economic success**. If these organizations and people also began to measure **power and autonomy** and **being valued in community**, they could create a seismic, positive shift in access to the American dream.



Measures of Mobility to Use with People with Low Incomes

The economic aspects of mobility from poverty are often tangible and can be captured in such factors as income, assets, and employment. Although power, autonomy, and community value involve complex (often hidden) thoughts and feelings, these dimensions of mobility can be quantified as well. In fact, social scientists have been measuring such dimensions for decades. The key is to find and choose the most appropriate measures for the context and the goals one is trying to achieve.

To measure all three dimensions of mobility among people with low incomes, researchers need reliable, valid, and culturally equivalent scales. A **reliable** scale consistently measures an aspect of well-being across components of the scale, population subgroups, and time. A **valid** scale accurately and completely measures the construct it claims to measure. And a **culturally equivalent** scale reliably and validly measures the same construct in different cultural groups.

As many linguists, anthropologists, and cultural psychologists note, no word or sentence has the same meaning in two different cultural contexts, or even for two different people. Some scales are better than others at capturing a social-psychological experience in different populations. **Cultural equivalence** is the ability of a scale to accurately measure the same construct in different groups of people. For example, a common scale for measuring symptoms of depression asks respondents to indicate whether they feel they are being punished. A “yes” may indicate the presence of a depressive symptom for the general population but may indicate something different for currently or formerly incarcerated people.

Similar cultural equivalence issues arise when applying commonly used scales to people with low incomes. Most social-psychological scales were created and validated for the middle class; few scales are designed for people with limited financial resources. Because most people in the United States with few resources have different material realities and life experiences than most middle-class people,¹ many scales may not reliably and validly measure social-psychological constructs for people with low incomes.²

For instance, many power and autonomy scales include items such as “When I decide to do something, I just do it.” Researchers usually interpret low scores on these items as meaning that a person has low levels of psychological power and autonomy. Yet in lower-income communities, low scores may instead mean that people are realistically evaluating their environmental constraints. In other words, people can have high levels of psychological autonomy and power—and exercise them in situations that allow them to do so—while acknowledging that their typical contexts do not allow them to “just do it.” For this reason, researchers

should interpret people's power and autonomy in light of their actual social, political, economic, and environmental opportunities and constraints.

With these concerns about cultural equivalence in mind, we use the following system to recommend scales for measuring the social-psychological dimensions of social mobility. Our first preference is for scales that have been validated with low-income people in the US and that predict outcomes relevant to economic development. These outcomes include health, as studies show that health is both a consequence and a predictor of socioeconomic status.³

Our second preference is for scales that predict important outcomes among lower-income people in the US, even if the scale was not designed for this group. Our next level of scales is those that have reliably predicted differences between socioeconomic groups, including lower-income people in the US. The final level of scales we recommend includes widely used instruments that could be modified for use with low-income populations. These modifications include rewriting items that lack cultural equivalence and then testing these items for cultural equivalence.

Some theorists contrast autonomy with community, or power with belonging. Yet these constructs often overlap, particularly in communities with few material resources. In many communities, for example, agency derives from one's relationships and social connections at least as much as it does from one's own attitudes and goals. A sense of dignity or self-efficacy is often tied to one's reputation and status in a social network or community. So, we take special care to select measures that do not assume a tradeoff between agency and belonging, and we note specific measures (e.g., collective efficacy) that capture aspects of both constructs.

Measuring Power and Autonomy

Power is a person's ability to influence their environment, other people, and their own outcomes, and **autonomy** is a person's ability to act according to their own decisions, rather than according to other's decisions.⁴ Many studies of middle-class white people in the US show that people with greater power and autonomy feel happier, persevere longer, perform better on cognitive tasks and in the workplace, and live longer and healthier lives than do people with less power and autonomy.⁵ Studies with lower-income people similarly suggest that power and autonomy can both drive and result from social mobility.⁶

The following measures capture power and autonomy among low-income people. The measures of health, well-being, and coping styles included in this section are widely used to evaluate how people are adapting and adjusting to the opportunities and challenges of their life circumstances. The measures are also closely tied to how much power and autonomy people experience.

Agency is a sense of being in control of one's actions and having the ability to accomplish one's goals.

The *Psychological Well-Being Scale* (Midlife in the United States Study-II version)⁷ has 42 items arranged into six subscales that measure autonomy (e.g., "I have confidence in my opinions, even if they are contrary to the general consensus."), environmental mastery (e.g., "In general, I feel I am in charge of the situation in which I live"), personal growth (e.g., "I think it is important to have new experiences that challenge how you think about yourself and the world."), positive relations with others (e.g., "People would describe me as a giving person, willing to share my time with others"), purpose in life (e.g., "Some people wander aimlessly through life, but I am not one of them."), and self-acceptance (e.g., "When I look at the story of my life, I am pleased with how things have turned out"). Psychological well-being relates positively to job performance, motivation, and health.⁸ In the US, higher social status (e.g., greater educational attainment) is associated with better psychological well-being.⁹ The Psychological Well-Being scale has been used in nationally representative US studies that include Americans with low incomes.¹⁰

BOX 1

How to Use a Standard Psychological Measure: The Psychological Well-Being Scale, Environmental Mastery Subscale

Participants rate how much they agree or disagree with each statement using the following scale: 1 = Strongly agree; 2 = Somewhat agree; 3 = A little agree; 4 = Neither agree or disagree; 5 = A little disagree; 6 = Somewhat disagree; 7 = Strongly disagree.

1. "In general, I feel I am in charge of the situation in which I live." (R)
2. "The demands of everyday life often get me down."
3. "I do not fit very well with the people and the community around me."
4. "I am quite good at managing the many responsibilities of my daily life." (R)
5. "I often feel overwhelmed by my responsibilities."
6. "I have difficulty arranging my life in a way that is satisfying to me."
7. "I have been able to build a living environment and a lifestyle for myself that is much to my liking." (R)

Reverse-code items marked with (R), and calculate the sum of each set of items.

Full versions of the measures and instructions for their use will be available on the toolkit website.

Source: Carol Ryff et al., "National Survey of Midlife Development in the United States (MIDUS II), 2004-2006: Documentation of the Psychosocial Constructs and Composite Variables in MIDUS II Project 1" (Inter-university Consortium for Political and Social Research, March 7, 2007), <https://doi.org/10.3886/ICPSR04652.v5>.

The *New General Self-Efficacy Scale*¹¹ is an eight-item scale that assesses whether people believe they will be able to accomplish difficult tasks, overcome challenges, and achieve their goals (e.g., "Even when things

are tough, I can perform quite well.”). This scale has been tested among low-income people in the US.¹² Among low-income participants, self-efficacy predicts physical activity and better health.¹³

The *Sense of Control Scale*¹⁴ has 12 items that measure a person’s sense of mastery over their outcomes (e.g., “Whether or not I am able to get what I want is in my own hands”) and perceptions of constraints on their behavior (e.g., “Other people determine most of what I can and cannot do”). This scale has been used with low-income adults, and high levels of constraints predict more negative health outcomes.¹⁵

The *Self-Construal Scale*¹⁶ has 30 items that measure one’s level of connection or separation from others. Two subscales measure independence, a view of the self that emphasizes individuality and self-expression (e.g., “I act in the same way no matter who I am with.”) and interdependence, a view of the self that emphasizes fitting in and attending to others (e.g., “I often have the feeling that my relationships with others are more important than my own accomplishments.”)¹⁷ People from low income contexts tend to be more interdependent than people in higher income contexts.¹⁸ The Self-Construal Scale has been used with Americans from different socioeconomic backgrounds, including low socioeconomic status.¹⁹ Which type of self-construal is adaptive depends on the cultural context. For instance, in the US, studies have found that independent self-construal predicts eating a healthy diet, while in Japan, interdependent self-construal predicts a healthy diet.²⁰

Coping with stress is a person’s ability to cope with difficult, stressful, or upsetting situations, and the resources and strategies they use to do so.

The *Shift and Persist Scale*²¹ has 14 items that measure two beneficial strategies for dealing with stressful situations: *shifting*, which means accepting stress and adapting oneself to it; and *persisting*, which means finding meaning and optimism in the face of adversity. Evidence suggests that this “shift-and-persist” style of coping can mitigate some negative impacts of life stress on health throughout someone’s life.²² Reliability and validity have been demonstrated with adolescents and adults from a range of socioeconomic backgrounds, including people from the US from low–socioeconomic status backgrounds.²³

The *Revised Life Orientation Test (LOT-R)*²⁴ is a 10-item scale that reflects people’s beliefs about the future, whether optimistic (e.g., “In uncertain times, I usually expect the best”) or pessimistic (e.g., “If something can go wrong for me, it will”). Sustained economic hardship is associated with reduced levels of optimism over time,²⁵ and overall LOT-R scores and pessimism scores are correlated with family socioeconomic status in childhood, as well as with social mobility between childhood socioeconomic status and current socioeconomic status.²⁶ Optimism is associated with better physical health.²⁷

Growth mindset is a person’s beliefs about themselves and their basic qualities, including the extent to which they can change.

The *Growth Mindset Scale*²⁸ uses three items to assess a person’s belief that intelligence can change with effort (e.g., “You can learn new things, but you can’t really change your basic intelligence”). Growth mindset can drive motivation, the ability to take on and learn from challenges, and consistently predicts academic persistence and performance.²⁹ This scale has been used widely among student populations, including first-generation college students and low-income high school students.³⁰

Relatedly, the “*Kind of Person*” *Implicit Theories Scale*³¹ has eight items that measure people’s beliefs about whether people can change in general (e.g., “People can’t really change their deepest attributes” versus “Everyone, no matter who they are, can significantly change their basic characteristics”). A study with middle and high school students, including students on a free lunch program, linked the “kind of person” growth mindset with greater resilience to social adversity, less stress, better health, and higher grades.³² A version of this scale modified to reflect beliefs about social mobility predicted academic persistence in low-income high school students.³³

Health is a person’s physical, mental, and social well-being.

The *Health-Related Quality of Life* (CDC HRQOL-14) scale³⁴ has 14 items that give a comprehensive overview of a person’s health and well-being, which in turn can impact their sense of power and autonomy. The full set of measures, HRQOL-14, has been validated in representative samples. A subset of this scale, the Core Healthy Days Measures (CDC HRQOL-4), is widely used on its own and has been shown to predict mortality, hospitalization, and health care utilization in a large prospective study.³⁵ It has been used with low-income Americans, who report lower health-related quality of life.³⁶

The *Self-Reported Health*³⁷ measure is a single item that captures people’s overall perceived health: “In general, would you say your health is poor, fair, good, very good, or excellent?” The measure correlates with objective physical and mental health over time (e.g., cancer, cardiac disease, epilepsy, depression)³⁸ and mortality across socioeconomic status levels.³⁹ Socioeconomic status predicts self-reported health.⁴⁰

Measuring Being Valued in Community

Being valued in community is a person’s sense that they belong and are included among family, friends, coworkers, neighbors, other communities, and society. A related concept is **social capital**, which is a web of relationships that has economic benefits.⁴¹ Being valued in community facilitates access to material and cultural resources—including access to nutritious food, clean water, and safe environments. At the same time, not being valued in community increases exposures to pollution, violence, and other forms of trauma.

In this section, we list reliable, valid, and culturally equivalent measures of being valued in community for use with low-income people in the US. These instruments include measures of relationships, social networks, belonging, subjective social status, collective efficacy, discrimination, safety, and exposure to adverse events.

Social connectedness is a person’s relationships with other people and groups.

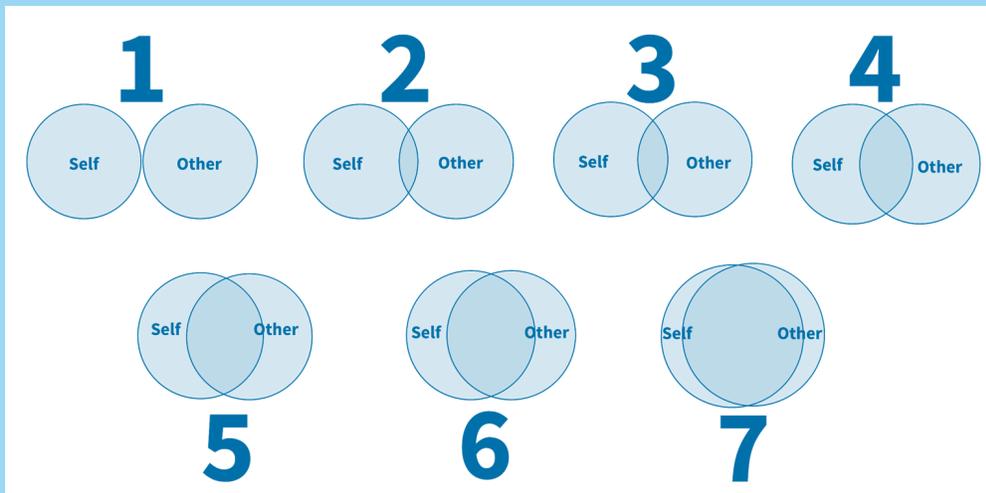
*The Inclusion of Other in the Self (IOS) scale*⁴² is a single item that measures a person’s sense of closeness with another person or group. Participants respond to the question “Which picture best describes your relationship with [this person/group]?” by selecting one of seven options. Each picture contains a pair of circles, which range from just touching to almost completely overlapping (see below). By adapting the person or group labeled in this measure, researchers can gather data about specific relationships (e.g., parents, romantic partner, closest friend, community). For instance, an adapted measure assessing inclusion of the community in the self among previously incarcerated people found that that connectedness to the community at large predicted adjustment including residential stability, homeownership, marital status, and educational and vocational upgrades.⁴³

BOX 2

How to Use a Standard Psychological Measure: The Inclusion of Other in the Self Scale

Participants circle the picture from the IOS that best describes their relationship with [selected person/group].

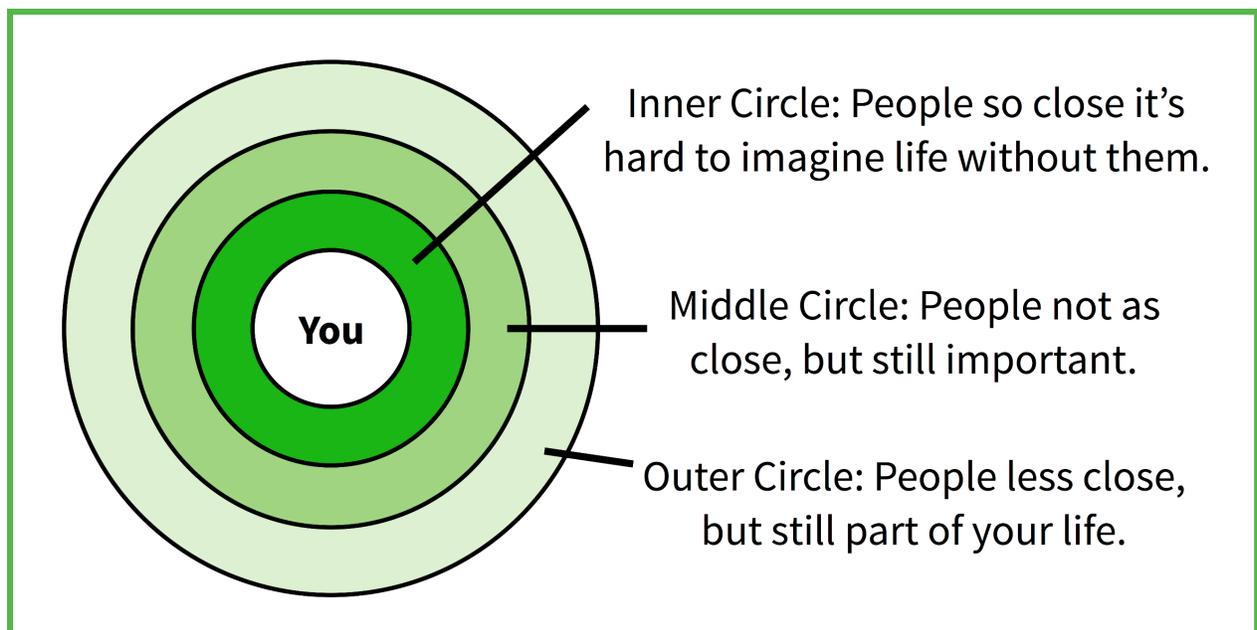
Scoring: Score the scale from 1 to 7, with 1 being the least close and 7 being the closest.



Full versions of the measures and instructions will be available on the forthcoming toolkit website.

Source: Arthur Aron, Elaine N. Aron, and Danny Smollan, “Inclusion of Other in the Self Scale and the Structure of Interpersonal Closeness,” *Journal of Personality and Social Psychology* 63, no. 4 (1992): 596–612, <https://doi.org/10.1037/0022-3514.63.4.596>.

The *Social Support Convoy Model, Hierarchical Mapping Technique*⁴⁴ allows participants to freely name the members of their own relational networks. The Social Support Convoy asks participants to list the people in their personal network who best fit in each of three concentric circles (see below). This measure provides a detailed picture of the breadth and depth of someone’s relationships. The model has been used with racially and socioeconomically diverse American samples.⁴⁵ For instance, one study found that black Americans tended to have smaller networks containing a higher proportion of family members, and had more frequent contact with network members, than white Americans.⁴⁶ Using education as a marker for socioeconomic status, a study using the Convoy model found that people with more than a high school education had larger social networks than those with less than a high school education.⁴⁷ In terms of the relationship between socioeconomic status and health, one study found that, among men with less education, those with larger social networks have fewer health problems than those with smaller social networks.⁴⁸



*The Belongingness Scale–Sense of Social and Academic Fit*⁴⁹ is composed of 17 items that measure a person’s sense that they are valued and can succeed in a group. The Belonging Uncertainty Scale⁵⁰ is a three-item scale that measures a person’s level of uncertainty that they can fit into a group. Studies show that increasing a child’s sense of belongingness improves grades, particularly among lower-income students of color.⁵¹ Additionally, among black and white college students, increasing a sense of belonging can shrink disparities in achievement and improve overall happiness and health.⁵² The scale can readily be adapted for other contexts. For example, “I fit in well at [school name]” might be adapted for a workplace (“I fit in well at [my workplace]”) or community (“I fit in well [in my neighborhood]”).

*The Collective Efficacy Scale*⁵³ measures both informal social control (e.g., “Would you say it is [likely or unlikely] that your neighbors would intervene if a fight broke out in front of your house?”) as well as overall social cohesion and trust (e.g., “People around here are willing to help their neighbors.”) to assess the ability of a person’s community to achieve their desired goals. Originally validated in a socioeconomically diverse area of Chicago, the scale predicts a wide range of outcomes including lower levels of neighborhood violence,⁵⁴ partner violence,⁵⁵ and better health.⁵⁶

We feel a sense of dignity when our own lives produce value for ourselves and others. Put simply, to feel dignified, one must be needed by others.
—Arthur Brooks, Partnership member⁵⁷

Relational stress is the strain caused by a person’s relationships. It includes stress caused by close relationships, sensitivity to and experiences of social rejection, and loneliness.

The *Family Support and Strain Scale*⁵⁸ consists of eight items that measure both assistance from family members (e.g., “Not including your spouse or partner, how much do members of your family really care about you?”) and hardship from family members (e.g., “How often do [your family members] let you down when you are counting on them?”). This scale has been used in nationally representative samples,⁵⁹ and it associates greater social support with better health.⁶⁰

The *UCLA Loneliness Scale, Version 3*⁶¹ consists of 20 items that measure how frequently a person feels that they lack companionship, do not have anyone to turn to, or are left out or isolated from others. This measure has been used with various populations, including homeless youth,⁶² teen mothers,⁶³ and low-income immigrants.⁶⁴ Loneliness has been associated with job burnout among nurses and teachers,⁶⁵ a higher number of chronic illnesses among older people,⁶⁶ and reduced physical activity.⁶⁷

Social standing is a person's experience of how they are perceived and treated by others.

The *MacArthur Scale of Subjective Social Status*⁶⁸ is a single item that measures person's perception of their social standing relative to other people. Participants are shown a drawing of a ladder with 10 rungs that represents where people stand within a given group (e.g., "other people in the US," "other people in my community"). People with the highest standing are at the top, and people with the lowest standing are at the bottom. Participants mark where they would place themselves on the ladder relative to others in that group (see right). Researchers have successfully modified the scale for reference groups such as "my neighborhood," "my school," and "my workplace." Among some low-income people and people of color in the US, the scale has also proven better at predicting self-rated health than some measures of objective social status.⁶⁹



The *Perceived Discrimination Scale* (MIDUS-II version)⁷⁰ has 20 items that assess people's daily and lifetime experiences of perceived unjust treatment or unfair disadvantage in areas including education (e.g., "Have you ever been unfairly discouraged by a teacher from continuing your education?"), employment (e.g., "For unfair reasons, have you ever not been hired for a job?"), housing (e.g., "Have you ever been unfairly prevented from moving into a neighborhood because the landlord or a realtor refused to sell or rent you a house or apartment?"), and law enforcement (e.g., "Have you ever been unfairly stopped, searched, questioned, physically threatened or abused by the police?"). The scale also assesses why the person believes these experiences happened (e.g., because of gender, race, age, religion, or physical appearance). The Perceived Discrimination Scale has been used with participants from multiple socioeconomic status backgrounds, including people in poverty in the US.⁷¹ Perceived discrimination has a significant negative effect on both mental and physical health⁷² and partially accounts for the association between poverty and mental and physical health.⁷³

Trauma is a person's exposure to abuse, neglect, and violence.

The *Adverse Childhood Experiences* (ACE) scale⁷⁴ has 17 items that measures children's exposures to physical, verbal, and sexual abuse, emotional and physical neglect, and traumatic events such as divorce, domestic violence, and parental incarceration. For example, this questionnaire asks "Prior to your 18th birthday, did a parent or other adult in the household often or very often swear at you, insult you, put you down, or humiliate you? Or act in a way that made you afraid that you might be physically hurt?" Higher number of ACEs increases the risk of multiple negative outcomes in later life, including chronic disease,⁷⁵ worse health-related quality of life,⁷⁶ depression,⁷⁷ impaired work performance, absenteeism, and financial stress.⁷⁸ The Expanded ACE Scale⁷⁹ additionally includes neighborhood and community level stressors relevant to youth in urban, lower income settings. For example, "Were you ever in foster care?" Both the

original and expanded ACE scales have been tested with low-income and socioeconomically diverse urban samples.⁸⁰

The *Survey of Exposure to Community Violence*⁸¹ has 54 items that measure people's exposures to specific community sources of physical, mental, emotional, and relational threats and assaults (e.g., being chased, exposure to illegal drugs, being arrested, physical assault, or witnessing a suicide or homicide). Exposure to community violence is associated with negative outcomes including psychological distress and behavioral problems.⁸² Modified versions of the survey have been validated with diverse populations, including African American single mothers, children in economically disadvantaged areas, and urban college students.⁸³ For instance, the *Community Experiences Questionnaire*⁸⁴ is a 25-item measure adapted from the Survey of Exposure to Community Violence that uses simplified language to measure direct and indirect exposure to violence. In studies with urban elementary school children, researchers found that community violence exposure was associated with poor academic performance⁸⁵ and violent victimization was associated with negative social outcomes.⁸⁶

Measuring Economic Success

Economic success captures factors that directly contribute to individuals' and families' material well-being. Those factors fall into four broad categories: income, assets, and income adequacy; employment; skills (human capital); and family demographic circumstances. Success in these domains is in relative terms: Do incomes rise over time? Do people move from joblessness to part-time employment? Economic success must also take into account people's goals and needs.

Indicators of economic success can come from both survey and administrative data. Responses to survey questions may be misleading if participants cannot recall or do not know the correct answers to the questions or misunderstand questions. Consequently, the survey items we suggest are from well-established federally sponsored surveys that have been validated and whose strengths and limitations are well understood. Those surveys are often the source of official estimates of income, poverty, and other important indicators of material well-being.

BOX 3

Measuring Economic Success Using Administrative Data

Considerable information on individuals' incomes, employment, earnings, and participation in public assistance programs is reported to and recorded by government entities to administer tax and transfer programs. Those data can be used to measure economic mobility, but they are not widely and consistently available. Government entities and other stakeholders have valid concerns about protecting individuals' privacy, and information on any one person or family is spread across multiple different administrative data systems that are not necessarily linked to one another.

Privacy and logistical challenges have been overcome when government officials and other stakeholders see clear value in linking data across different systems to better understand and address constituent needs and assess program performance. For example, some states have linked the quarterly wage data employers report to the Unemployment Insurance system with information on Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance (SNAP) receipt to see how people leaving public assistance fare in the labor market. Because of the challenges in accessing and using administrative data, we do not discuss them in detail here, nor do we include them in our mobility measurement toolkit. We do encourage the use of administrative data when appropriate, and the Partnership has published a paper from several authors who put forward a strategy for increasing the availability and usability of such data.^a

^a Julia Ingrid Lane, David C. Kendrick, and David T. Ellwood, *A Locally Based National Initiative to Support People and Communities and Transform the Use of Government Data* (Washington, DC: US Partnership on Mobility from Poverty, forthcoming).

Income and Income Adequacy

The most basic, fundamental marker of economic success is how much money a person makes, conventionally measured as income. Although the concept is straightforward, measuring income poses both theoretical and practical challenges. Researchers normally talk about income on an annual basis—for example, taxes are based on adults' annual incomes—but for people whose incomes are highly volatile, annual income may mask periods of extreme hardship.

Researchers must also decide what counts as income. The simplest approach is to consider only cash coming into the household.⁸⁷ But in-kind transfers such as benefits from SNAP provide important support to families with low incomes. Similarly, taxes diminish a household's resources while refundable tax credits increase those resources. In addition to overall income, income sources can reveal a great deal about mobility; higher earned income suggests greater upward mobility while higher public assistance usually indicates less.

Income adequacy also depends on the number of people that income must support and the cost of living that they face. One way to assess if income is adequate to meet a family's needs is to compare it to an "adequacy threshold" such as the federal poverty threshold. Yet two families of identical size and composition with the same income may face very different costs for child care, food, housing, transportation, and health care depending on where they live. Consequently, it can be helpful to use several vetted scales to directly measure the material hardships that families may be experiencing.

Other factors related to income can also capture economic success. Wealth (i.e., savings and other financial assets) can buffer families against unexpected expenses and income losses, while debts can strain family finances, regardless of income.

The following measures capture or can be adapted to capture income, earnings, wealth and debt, and material hardship among people with lower incomes.

Income and income sources are the financial resources that accrue to a household, family, or person over a specified period. Surveys can focus on certain types or the composition of income (e.g., earned income, transfer income) and may include the cash value of in-kind benefits. Finally, income can be computed or reported either before or after taxes.

The *Annual Social and Economic Supplement to the Current Population Survey* (March CPS), administered every year in March, is a well-vetted source for federal income data. The battery of income-related questions can be used to ascertain annual income by source.

The *Survey of Income and Program Participation* (SIPP) core income questions can be used to ascertain income data monthly.

Earnings from employment represent the primary source of income for most nonelderly households. Earnings can rise through increases in hourly wage rates (getting a raise, promotion, or higher paying job) and through increases in hours worked. When measuring annual earnings, it is important to ask about all jobs respondents held during the year.

The *March CPS* contains questions that can ascertain **annual earnings**. We can use the March CPS to compute **hourly wage rates** by dividing annual earnings by the product of usual hours worked per week and weeks worked last year. However, the approach, while common, is prone to measurement error because it requires three components, and an error in any one can distort the estimated hourly wage rate.

The *Current Population Survey Outgoing Rotation Group* includes questions to compute workers' hourly wages for their current job.

BOX 4

How Earnings Are Measured in Federal Data: The Survey of Income and Program Participation

The next questions are about income *Maya* received from her job with *ABC Company*.

1. Did Maya have a set annual salary, was she paid by the hour, or was she paid some other way?
2. What was Maya's regular hourly pay rate at ABC? Do not include overtime rate here. Income earned at overtime rates will be collected later.
3. How often was Maya paid by ABC?
4. When did \$X an hour pay rate first show up in Maya's paycheck?
5. What was Maya's hourly pay rate before that?
6. Earlier you said Maya usually worked Y hours per week. At \$X per hour, that comes out to \$Z. Does that sound right to you for gross income?
7. What is your best estimate for income before deductions?
8. Can you give me an approximate annual salary amount?

Source: Adapted from Survey of Income and Program Participation, 2008 Panel, Wave 1 Questionnaire, Section: Labor Force 2, as documented in <https://www.census.gov/content/dam/Census/programs-surveys/sipp/tech-documentation/complete-documents/2008/SIPP%202008%20Panel%20Wave%2001%20-%20Core%20File.pdf>.

Poverty thresholds represent the minimum level of income required to meet basic needs. That level can be established in several ways.

The *official poverty measure* was established in the 1960s and was based on the amount of money needed to purchase a nutritionally adequate amount of food for households based on their size and composition.⁸⁸ As the typical family back then spent one-third of its income on food, the poverty threshold was set at three times the amount to purchase the minimum food budget. It adjusts for family size and composition (adults eat more than children) and for inflation. The official poverty threshold is an annual measure and only considers cash income before taxes. As with any binary indicator, a family whose income is one dollar above the threshold is considered not in poverty while a family with income one dollar below the threshold is considered in poverty, even though the two families have roughly the same economic resources. As such, it is useful to consider how far above or below the threshold a particular family falls.

The *supplemental poverty measure* considers the value of in-kind benefits and tax credits as well as a family's cost of living (rent, health care costs, child care costs, etc.).⁸⁹ It is an important complement to the official poverty measure.

Financial and physical **assets** (e.g., savings, home) are a "stock" or "store" of resources that can be converted to a flow of income (cash) for meeting both regular and unanticipated expenses. **Debt** refers to money that is owed and must be paid to others. **Wealth** is the value of what people own (assets) minus what they owe (debt).

Individuals with low incomes often have limited wealth, but owning a home can provide residential stability and a vehicle for building wealth. The *American Housing Survey* provides an example of how to ask about homeownership.

The Federal Reserve's *Survey of Household Economic Decision Making* assesses another indicator of financial resources beyond income: whether a family has the resources to meet an unexpected \$400 expense. The survey also assesses an important indicator of debt: whether the household has ever missed a payment. Households with limited income may have various debts from payday loans, credit cards, student loans, health care costs, and more. How strongly those debts obstruct economic success depends on whether the household members can repay them.

Material hardship is the difficulty in meeting basic needs that arises from having low income. Monetary measures are an imperfect measure of well-being. Two families of identical size and composition with the same income may face very different costs for child care, food, housing, transportation, and health care depending on the community and part of the country in which they live. Consequently, it can be helpful to use several vetted scales to directly measure material hardships families may be experiencing.

The USDA's *U.S. Household Food Security Survey Module* is a survey-based scale that ascertains whether a family is experiencing hunger. It has long- and short-scale versions.

Similarly, a *housing security index* can be constructed using survey items that measure whether housing is stable and adequate.⁹⁰

Lack of access to health care also is a maker of material hardship. The *National Health Interview Survey* includes a question directly asking whether there was any time in the past year during which respondents needed medical care but did not get it because they could not afford it.

Employment and Job Quality

Common paths to mobility are employment and increasing hours at work (depending on both prospects for advancement and family circumstances). But even jobs with similar pay vary in quality and prospects for advancement. Conventional job quality indicators include nonwage compensation (e.g., employer-sponsored health insurance), paid time off, and work schedules. Assessing how much a job could drive mobility can be challenging, and workers themselves may not fully understand their career pathways.

We can use the following resources to assess low-income people's employment and job quality:

The *Current Population Survey Outgoing Rotation Group* includes questions about employment status and hours worked.

The *March CPS* has straightforward questions about employment status, usual hours worked, employer-sponsored health insurance offer and uptake, pension plan offer and uptake, and paid time off.

The *SIPP* has questions about work schedules, which can reveal whether work takes place at non-standard hours or on an everchanging schedule. Irregular schedules may make it difficult to arrange child care, attend school, or participate in further skills training or postsecondary education—all of which can be barriers to mobility.

Skills and Human Capital

Building skills and gaining labor market experience are important contributors to upward mobility. Increasing educational attainment and successful completion of training and certification programs are important precursors to improved employment prospects, earnings, and income. It is also important to assess children's cognitive development and academic progress.

The *Current Population Survey* provides standard questions for ascertaining educational attainment, which is the amount of formal education a person completed. These items include years of schooling attended and completed and highest degree earned. Educational attainment is strongly related to income and employment outcomes.⁹¹

The *Children of the National Longitudinal Survey of Youth* provides an example for asking about grade point average. Although it is an imperfect indicator of performance and ability, grade point average can be useful for predicting future academic enrollment and post-schooling employment outcomes.⁹²

The *National Longitudinal Survey of Youth* includes straightforward questions about workplace skills training in programs outside of traditional academic settings. Participation in workplace training and career and technical education can lead to better and higher-paying employment opportunities. The survey also has measures of children's progress through school and enrollment in special education programs.

The *Peabody Individual Achievement Test* tracks children's their age-appropriate math, reading, and reasoning skills, which contribute to their future economic success.

Family Demographic Circumstances

Living arrangements and household composition are not, in and of themselves, markers of economic success, but they are strongly correlated with income and poverty.⁹³ Single-parent families are more likely to be poor than two-parent families, and children from married-parent families tend to have stronger

economic outcomes as adults than children from single-parent families. Clearly, there are circumstances under which a single-parent arrangement is superior for both parent and child (e.g., a high conflict relationship),⁹⁴ and the correlations between family structure and well-being are not necessarily causally related. Nevertheless, assessing and tracking changes in the demographic circumstances of families can be useful when discussing upward mobility from poverty.

The *Survey of Income and Program Participation* includes a household roster, on which a focal individual lists all the people living in their household. Understanding who lives in a particular household and how those people are related to one another can provide insight into the stability of living arrangements and the setting from which families try to achieve upward mobility and economic security.

The *National Longitudinal Survey of Youth* has questions on unintended pregnancies, mistimed births, and parents' age, educational attainment, and relationship status (e.g., married, cohabiting, dating, or apart). Becoming pregnant unintentionally and having a mistimed birth can interfere with adults' ability to complete their desired level education and may constrain their employment choices and opportunities.⁹⁵ These pregnancies and births can lead to complex and unstable living arrangements,⁹⁶ which may have negative impacts on children's development.⁹⁷ In addition, children born to young, unmarried parents with low levels of schooling tend to face more adversity growing up and achieve lower levels of economic success as adults than other children.⁹⁸

Economic Success at the Community Level

The measures of economic success discussed above focus on tracking mobility for individuals, but it can be important to chart the progress for entire communities. Communities can be defined by geography (neighborhood, city, county, state, region and even nation) as well as by sociodemographic similarities (e.g., refugees, people with disabilities, individuals without high school degrees). For the most part, collective measures of economic success can be constructed by aggregating individual measures. For example, beyond considering if someone's income falls below the poverty threshold, researchers can compute the poverty rate for everyone in a particular community. Further, it is possible to combine various aspects of economic success to construct a broader scale to measure mobility. For example, the *Economic Hardship Index* combines six factors, including poverty and unemployment rates, to construct a summary measure of well-being at the census tract level.⁹⁹

The Relationship among the Three Principles of Mobility from Poverty

The three principles of mobility—power and autonomy, being valued in community, and economic success—are mutually reinforcing, and progress in one domain can lead to improvements in others. For example, someone who finds a higher paying job may experience a growing sense of autonomy and feel he or she has attained higher social status. Similarly, a growth mindset might make a person more likely to engage in learning opportunities like job training, which can lead to career advancement. And developing stronger social networks can create access to better employment opportunities and lead to a greater level of self-efficacy and well-being.

On the other hand, failure to make progress in one dimension can undermine progress in others. For example, a job providing little more than a paycheck with little control over how and when work is done may reduce someone's sense of control, create difficulties with participating in family and community life, and erode social status. Ultimately, those reductions in power, autonomy and being valued could make it difficult to maintain that job, so the resulting progress on economic security may be temporary. Similarly, increases in self-efficacy or sense of control may be short lived if an individual does not find that their sustained work efforts result in a higher standard of living.

Conclusion

Understanding that poverty is about more than a lack of money can ultimately help us design approaches to promote mobility from poverty that are truly significant and sustainable. If more philanthropies, government agencies, service providers, advocates, organizers, researchers, and evaluators begin to measure power and autonomy and being valued in community, this could be transformative. What we choose to measure and the outcomes we attain drive strategy, investments, program design, and ultimately not just what services are delivered, but how they are delivered--with dignity, with respect, in ways that foster agency and belonging.

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