

Appendix A
Summary: Roundtable
Meeting on Measuring
Material Hardship

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Overview

On February 20, 2002, the Office of the Assistant Secretary for Planning and Evaluation (ASPE) sponsored a one-day Roundtable Meeting on Measuring Material Hardship. Meeting participants included 40 researchers from both inside and outside the federal government with expertise related to measuring material hardship and family and child well-being. Julia Isaacs (ASPE) and Tammy Ouellette (Abt Associates) facilitated the Roundtable.

The Roundtable Meeting was one of several initiatives undertaken by ASPE as a part of its one-year Material Hardship project. In recent years, a number of national and state surveys have used material hardship measures to supplement more traditional measures of family or household income when assessing family well-being. However, although material hardship measures have considerable value and policy-relevance, they face methodological challenges. There is a lack of consensus on which specific hardships should be measured, and whether and how they might be combined into an index of deprivation. Additionally, researchers are still evaluating the validity of hardship measures currently being used and how these measures compare to more traditional economic measures of income and poverty. In this context, ASPE's Material Hardship project was initiated to advance the study of material hardship measurement by addressing the following broad questions:

- What are the strengths and weaknesses of the existing measures on material hardship and the data resulting from these measures?
- What, if any, next steps should be undertaken in the development of material hardship measures?

In light of these project goals, the one-day Roundtable Meeting was developed to bring together researchers and experts familiar with material hardship measures to:

- Advance the understanding of “where we are” in measuring material hardship.
- Determine to what extent there is agreement as to what we are measuring and how it should be measured.
- Determine what guidance can be provided to the project's remaining nine months (e.g., topics that might be covered through such efforts as commissioned papers and longer-term steps needed to further develop material hardship measures).

The following report summarizes the Roundtable Meeting's proceedings. Specific sections correspond to the Meeting's six discussion sessions:

1. Underlying Constructs Behind Material Hardship Measurement.
2. Criteria for Developing Measures.
3. Analytic Strategies.
4. Key Dimensions of Material Hardship.
5. Concrete Measures.
6. Unanswered Questions and Recommendations for Next Steps.

Each section begins with an overview of the discussion questions presented at the beginning of the Meeting's session. To lead off these discussions, one or two researchers were asked in advance of the Meeting to comment on the discussion questions. The text reflects a summary of statements made by the lead off discussants and an overview of the ensuing discussions on specific topics. A list of Meeting participants and a copy of the Meeting's agenda are provided at the end of Appendix A.

Discussion Session I: Underlying Constructs Behind Material Hardship Measurement

Discussion Questions

- 1.1 What are we measuring when we consider material hardship among low-income families and children?
 - 1.1a To what extent is it a measure of material deprivation?
 - 1.1b How does material hardship relate to total family and child well-being and to income-poverty measures?
- 1.2 Why are we interested in material hardship measures?
 - 1.2a How are measures of material hardship policy-relevant in the context of welfare reform?
 - 1.2b How are measures of material hardship policy-relevant in relation to cash and in-kind assistance, as well as providing primary services to meet basic needs?

Lead Discussant Comments

Susan Mayer (The University of Chicago) and Sandra Danziger (The University of Michigan) served as lead discussants for this session and focused their comments on the sessions' two discussion questions. Dr. Mayer's remarks emphasized the point that *hardship measures are not the same as income measures* and that *material hardship is not necessarily synonymous with poverty*. As a result, it is important to consider *what we are measuring* when we examine material hardship. For example:

- Whether we care about relative or absolute hardships (or both).
- The role subjective and objective measures should play in measuring material hardship.
- How the causes and consequences of material hardships should be integrated into measurement.
- What specific domains (e.g., food, housing, nutrition, consumer durables) should be included in our conceptualization and measurement of material hardship.
- How material hardship should be related to overall family well-being.

Dr. Danziger presented results from her recent work on the Women's Employment Study (WES) to illustrate how material hardships differ between families reliant on welfare and those that are reliant on work. For example, WES results demonstrate that problems with access to health insurance increase as families leave welfare for work, but housing problems are less likely among working leavers than among those who remain on the rolls. She also noted that, in the case of the WES, moving from welfare to work increases income, but may not significantly reduce the overall level of material hardship experienced by current and former welfare recipients. Several independent variables related to human capital (e.g., educational attainment, health status, prior work history) did

not affect levels of material hardship. However, domestic violence and mental health problems, net of other factors, predict whether a respondent reports any one or more of the following: food insufficiency, homelessness, eviction, or utility shut off.

Hardship Measures and Income

Most of the session's ensuing discussions built on the point that material hardship differs from income and poverty. Specifically:

- Most participants agreed that although material hardship is not the same as income or financial hardship, income is a factor contributing to material hardship because it is a resource (or input).
- It was noted that point-in-time measures of material hardship and income are not measuring the same thing. This difference may be attributed to difficulties measuring income and financial resources (e.g., existing income and poverty measures do not include non-cash benefits, EITC, childcare expenses, savings and debt). However, as you get closer to measuring lifetime income and lifetime hardship, the correlations between the two get higher. That is, in theory, if you have a great measure of income (e.g., net resources where income is adjusted for expenses, accumulated wealth, and debt), the difference between income and the level of hardship experienced would be attributed to differences in need and individual taste.
- Group participants also pointed out that not all hardships are directly related to insufficient income. For example, lack of access to health care may be related to non-financial hardships (e.g., insufficient supply of medical providers) and has implications for well-being.

The group noted that hardships are also measured imperfectly and often in just a few domains. For example, participants suggested that higher correlations between long-term measures of income and material hardship might be found if good measures of hardship were aggregated across domains (e.g., food and housing). However, despite this, there would still be differences because income and material hardship are conceptually different. Researchers also noted that differences in the levels of hardship between households of similar income levels might be accounted for by examining households' taste or spending preferences, behaviors (such as making trade-offs), needs, and community or neighborhood conditions.

Defining "Hardship"

One of the central themes of the discussion was that hardship is not a neutral social-scientific term, nor have researchers and policy-makers consistently defined it. Additionally, issues as to how it should be measured (e.g., subjective vs. objective measures) remain unresolved.

Roundtable participants noted that defining hardship is dependent on "who" decides what it entails as well as "what" dimensions should be measured. Two approaches to addressing these questions were suggested:

1. Over time, research may be able to help us determine what are "real" problems or hardships based on examining the consequences of various suspected hardships and by determining which of these results in negative outcomes. However, some participants felt that currently there exists insufficient expert judgment in this area and that more work is required.

2. It may be undesirable to project “expert” judgment onto other people and, instead, the public’s judgment should be used. An example of this approach has been implemented in Ireland and the United Kingdom, where public surveys have been used to ask members of the public to rank various goods and services as “absolutely necessary,” “important but not necessary,” or “optional” for daily living. These data are then used to create material hardship measures.

It is important to note that many Meeting participants thought that the best strategy for developing a consistent measure of material hardship would involve both of the above approaches.

In the context of defining material hardship, the group discussed the relative merits of using subjective and objective measures when measuring material hardship. (See *Discussion Session II: Criteria for Developing Material Hardship Measures* for more information related to this topic.)

Meeting participants also noted that the type of measure used to examine material hardship should be influenced by the purpose for which the measure will be used. (See below section on “*What Constitutes Material Hardship*” for more on this discussion topic.)

The use of the term “material hardship” was also discussed. Some participants proposed alternate terms such as “material living conditions,” or “non-income financial hardship,” as ways of describing this circumstance without the connotations of the word “hardship.” Other researchers were content with the term “material hardship,” particularly if it could be used in a way that acknowledges that material problems may occur at different gradients or levels of severity.

In later discussions during the day, it became clear that there was disagreement among Roundtable participants as to whether material hardship measures should only focus on material living conditions that are related to purchasing power, or whether this should look more broadly at social/community factors that affect families living in low-income neighborhoods. There also was disagreement as to whether neighborhood aspects (e.g., crime) were things that could be ameliorated by changes in income or resources, or whether they were things that are external to the household.

“What” Constitutes Material Hardship

The discussion of “what” dimensions or constructs should be included in a material hardship measure focused on the importance of knowing the purposes for which hardship measures would be used. That is, what is included in a material hardship measure may differ depending on whether it will be used for research, monitoring, or policy-making purposes. These factors affect the strategies used to develop and validate measures. Broadly, there was a suggestion for the group to focus on what we *want to* measure and not what we *currently* measure.

The group agreed that there is a need to understand the role behind the underlying reasons for hardship and how “need” is defined before determining “what” should be measured. For example, if the measures focus only on self-defined needs, we may miss key elements or overstate the level of hardship experienced. The group was concerned with whether an absolute boundary between hardship and non-hardship exists. The group’s consensus was that if there is a “true” boundary, research should be focused on “finding” or defining this boundary. Alternatively, if the boundary between hardship and non-hardship is arbitrary, it should be determined by public consensus.

There was also some discussion (in this session and throughout the day) as to whether measures of material hardship should focus strictly on outcomes or should capture some aspect of “why” the outcome occurred. Opinions were mixed as to what extent the reason “why” an individual experiences a hardship should be a factor in identifying “what” should be measured. One argument was that the data would be most useful if accompanied by a detailed follow-up question as to “why” a person experienced a hardship (e.g., if did not go to doctor because of lack of insurance, lack of provider, of lack of money). In contrast, some participants argued that measures should focus on outcomes, with the “why” being a secondary priority. Several participants questioned whether surveys do an adequate job of getting at underlying reasons behind material hardship. These participants commented that they thought questions as to why outcomes are observed might be better addressed using other research methods. For example, ethnography could provide some of the “why” answers quantitative surveys may be unable to elicit. Additional statistical modeling that draws from other parts of surveys may also help explain how household needs (such as having a disabled child) impact hardship.

There was a related discussion about the distinction between direct material hardships and indirect mediators. For example, some participants pointed out that “lack of health insurance” is a mediator, not a direct hardship. One argument was that the hardship measures should be “pure,” that is, looking at an outcome and using other data analysis from other parts of surveys to examine why the outcome occurred. In this case we should separate measuring hardship from examining why it occurred. Once the hardship is identified, researchers could then examine causes and know whether it was lack of money, transportation, or refrigerator that caused the hardship. Others felt strongly that material hardship should be examined in terms of financial pressure to retain its face validity (e.g., hunger due to dieting is not of any interest).

Trade Offs and Time Frame for Measurement

The group discussed the difficulties faced in measuring material hardship when aggregating across domains (e.g., food and housing) given the situation where people make “trade-offs” between domains (e.g., paying rent and buying food). Similarly, participants noted that the intensity and duration of a particular combination of hardships is also an important but difficult factor to consider when developing material hardship measures. Additionally, if you have a short-term measure of income and a point-in-time measure of hardship, it was argued that they would not measure the same things.

Discussion Session II: Criteria for Developing Material Hardship Measures

Discussion Question

2. Considering the criteria identified by Sondra Beverly (2001), the National Research Council's Panel on Family Assistance (1995), Bauman (1998), and Federman *et al.* (1996), which of these should we adopt to guide work on developing measures of material hardship and what additional criteria are needed?

Lead Discussant Comments

Connie Citro (The Committee for National Statistics) and Sondra Beverly (The University of Kansas) served as lead discussants for this session. Dr. Citro launched the discussion by reviewing three broad criteria for a poverty measure: *public acceptability (relative to the broad needs of the culture)*; *statistical feasibility (logically consistent and can be compared across groups, people, and time)*; and *operational feasibility (implies that data can be collected that will measure the underlying conditions of poverty)*. She noted that hardship measures might be easier to report than income, although more experimental measurement work is needed to look at such issues as self-reporting and the reluctance to report. She also added that hardship measures ought to be demonstrably linked to poor outcomes or well-being.

Dr. Beverly's comments referred to her seven recommendations for material hardship and, in particular, focused on three specific recommendations: *the core set of hardship measures should capture objective, rather than subjective conditions*; *the core set of hardship measures should consist of direct, rather than indirect, indicators*; and *to the extent possible, hardship measures should indicate the cause of hardship*. (For Dr. Beverly's seven criteria, see "Measures of Material Hardship: Rationale and Recommendations," *Journal of Poverty* (2001) 5(1), 23-41.) She explained that in her view the primary difference between subjective and objective measures was whether an individual was asked *about* an experience (objective), as opposed to *feelings or perceptions* of an experience. Similarly, in the case of direct measures, she felt that it was important to focus on outcomes associated with material hardship, rather than mediating factors (e.g., questions on health care would address unmet health needs, not lack of health insurance). Dr. Beverly also disagreed with earlier suggestions that hardship measures should focus solely on outcomes; instead, she felt that it was important to know *why* families experience hardship (e.g., it is important to know that hunger exists because of financial hardship, rather than because the individual is on a diet). In the absence of having information on the cause of a situation, it is difficult to determine whether a situation presents a "real" hardship.

Subjective Versus Objective Measures

There was considerable discussion in this session and throughout the day about the difference between objective and subjective measures. Researchers noted that there are fundamental differences between actual experiences and perceptions of actual experience. For example, the public may perceive that the crime rate is increasing, when, in fact, crime reports have remained relatively unchanged. This is not to say that perceptions are unimportant. For example, a mother's perception

that crime is rising in her neighborhood and its relationship to her subsequent decisions regarding work and childcare (e.g., leaving child home unattended) may be more important than the actual crime rate reports in administrative data. Still, it is important to recognize that questions on respondent perceptions may result in data that do not accurately reflect the facts of the situation.

It was noted that most survey questions related to material hardship have an element of subjectivity due to the fact that the respondent reports the information. In some cases, this may lead to either “false positives” or underreporting. For example, interviewers participating in the WES indicated that they saw respondents become visibly uncomfortable when they reported that they were unable to provide their children with sufficient food. This apparent discomfort was even higher than when respondents were asked questions about domestic violence. These comments led researchers to worry that mothers may underreport food insufficiency for their children due to embarrassment or discomfort with admitting that they cannot provide for their children.

Another concern about using self-reported perceptions of living conditions or material hardship is acclimatization. Ethnographers at the Roundtable pointed out that people get acclimatized to their material living conditions. For example, one participant noted that when she lived in a very impoverished area with her children, she did not notice her children were getting sick more often than in the past because other children in the neighborhood were frequently sick. Ethnographers also pointed out that families often tell them that their standard of living is “in the middle” because there are people below them as well as above them in terms of resources, and that they felt better off than others because they did not use certain types of services (e.g., “I don’t go to food banks, those are for people who really need them”).

One researcher suggested that instead of viewing responses as simply subjective and objective, we may want to recognize that people can report experiences and can also report perceptions of experiences. Moreover, both of these aspects can be measured in interesting and important ways using various data collection methods (e.g., asking the subject, or collecting the data in an alternative method). It may confuse the issue to assume all survey data are subjective because self-reported. For example, it is different to ask the respondent, “Do you view crime as a problem,” than to ask, “Have you experienced a specific crime in the last “x” months.” Also, one can ask, “Have you known neighbors who have experienced a crime in last “x” months,” or “Do your neighbors view crime as a problem?”

Validation

An additional criterion that was discussed in this session was validity. One participant noted that validation requires multiple types of validity (e.g., face, predictive, construct, discriminate). As a result, to validate a measure, it is important to have a rudimentary theory of what are the causes and consequences of hardship. Some participants stressed that we may need to spend less time refining the measures and more time developing theory and showing how even imperfect measures can be validated by how they operate. Other participants argued that we already have theories (e.g., one of the slides presented by Susan Mayer in her opening remarks, or the framework suggested by Kurt Bauman in his literature review of current research in this area). Still, others felt that there needs to be further theoretical work.

Some Roundtable participants argued that we should neither be concerned about the causes and consequences of hardship nor whether hardships have face validity to the public. It is not that we are

uninterested in consequences, but the consequences were seen as “round two” in the development process. The first step is to develop and start using the measures. Measure validation also depends somewhat on what the measures are being used for (e.g., research, monitoring, or policy-making purposes).

Discussion Session III: Analytic Strategies for Developing Material Hardship Measures

Discussion Questions

- 3.1 How important is it to develop a summary measure of hardship that includes multiple dimensions (e.g., food security, housing, health) rather than having separate measures of each dimension?
 - 3.1a For an individual dimension of hardship (e.g., housing), how important is it to have a summary measure rather than a group of standard indicators?
- 3.2 If dimensions are to be combined into a summary measure, should their relative weights be based on logic and judgment or based on statistical relationships?
- 3.3 If a summary measure is to be created, should it be categorical (e.g., in hardship vs. not in hardship) or continuous (e.g., a scale with values from 1 to 10)? Is it important to have a summary measure in both forms?

Lead Discussant Comments

Chris Hamilton (Abt Associates) kicked off the discussion by asking the group to consider how important it is to develop a summary measure, and then noted that if such a measure were developed, there were two possible approaches: 1) Creating a summary measure (or measures) using an axiomatic approach; and 2) creating a summary measure using a statistical approach. More specifically, he asked the group to consider whether weights used to develop a summary measure should be applied to measures based on logic and judgment (the axiomatic approach), or, alternatively, whether they should be based on the statistical relationships between items. These comments were followed two presentations providing examples of these two approaches. Kurt Bauman (U.S. Census Bureau) spoke of his research attempting to use statistical techniques to group hardship measures in the Survey of Income and Program Participation (SIPP) (*Aggregating Measures of Material Well-being*). Then Craig Gundersen (U.S. Department of Agriculture) described his research developing an index of hardship measures following an axiomatic approach (*Direct Measures of Poverty and Well-being: A Theoretical Framework and Application to Housing Poverty in the United States*).

Roundtable participants did not express overwhelming support for a summary measure in the discussion that followed. The group felt that separate indicators seemed to be as important as summary measures. One roundtable member noted that a summary measure would be acceptable at the family level, but at an individual level a summary measure would not be useful.

Some researchers noted that instead of focusing efforts on combining or summing material hardship measures, existing surveys that collect extensive data on material hardship (such as the SIPP and NHANES) should be expanded to include larger sample sizes at the state and local levels so that existing measures might be compared among a larger number of groups.

Reference was also made to the work of Kenneth Land on developing an indicator of child well-being that aggregates 25 child well-being indicators. This measure was perceived as being useful for tracking overall phenomena, but detail beyond the “one number” was needed to better understand child well-being.

It was also suggested that to effectively understand and track hardship a cluster of indicators would be needed. One Roundtable member stressed that, “If nothing else, the current poverty indicators are grossly inadequate.” For example, if there was an indicator that tracked the well-being of children via household surveys, we could miss out on data such as school and health.

Discussion Session IV: Identifying the Key Dimensions of Material Hardship

Discussion Questions

- 4.1 What are the key dimensions of material hardship (e.g., food insecurity, shelter, and access to health care)?
- 4.2 What does ethnography tell us about the key dimensions of hardship?
- 4.3 What does a review of major survey-based research tell us about key dimensions of material hardship?

Lead Discussant Comments

The Session began with presentations by ethnographers, Andrew London (Kent State University) and Laura Lein (University of Texas). Generally speaking, both felt that participant observations pointed toward hardships in many of the areas, or domains, that had already been discussed during the day (e.g., food insecurity, housing quality and insecurity, and health care). Difficulties covering prescription drugs and unmet needs for dental care were mentioned as specific forms of health care hardship that come up a lot in the ethnographic interviews. Women in their ethnographic studies also mention some areas of hardship not yet discussed, such as: access to safe childcare, school hardships for children (lack of resources and class size); lack of clothing for children and the women themselves; and durable goods in the home. When looking at consumer durables, they suggested that the group also think about where these goods came from. For example, a household may have a dishwasher, but the item may have been purchased for the household as a gift and could, therefore, lead researchers to false conclusions about the level of hardship in the household.

Consumer Durables

The group focused its discussion on what role durable goods in the home (or lack thereof) should play in material hardship measurement. Some participants stressed that it is important to differentiate items that can be purchased at one time (e.g., a television set or a telephone) from things that must be paid for or maintained on a monthly basis (e.g., groceries or telephone service). One argument for having more, rather than fewer measures of material hardship is that sometimes information that may not seem critical (e.g., television set) can later be related to hardship. Additionally, ethnographers participating in the Meeting indicated that many low-income mothers felt that “losing their children to the streets” or “child protective services” were the worst hardships possible. As a result, these mothers make conscious choices about what they purchase (e.g., cable television, expensive clothing) so that their children do not turn to illegal activities to gain access to these items, or to keep others from viewing them as a “bad mother.” Oftentimes, acquiring these items requires mothers to sacrifice other necessities (e.g., food) that would be considered a hardship.

Some argued that using the presence of durable goods as a material hardship measure may be misleading. For example, durable goods are relatively cheap, do not require periodic replacement,

and may be easier for financially distressed families to acquire than ongoing needs like food. Also, families may have acquired these items prior to encountering their current living situation in which they experience material hardship. Other Roundtable participants pointed out that durable goods are often gifts from an absent father or relatives.

One argument in favor of including consumer durable goods in a measure of material hardship is the substantial rise during the past century in the number of households that own these goods. As a result, collecting data on this rise is important to understanding how Americans' standard of living today is much higher than it was 50 years ago. For example, washing machines and dryers in homes are now more prevalent. Likewise, Americans have many more consumer durable goods than people in less developed countries, and documenting these material advantages can contribute to understanding economic well-being in this country.

It was also noted that clothing may also be considered a durable good that should be included in a material hardship measure. For example, children require new winter coats almost every year because of growth. Moreover, in some climates, not having appropriate winter clothing is a severe hardship.

Setting

Neighborhood characteristics were also addressed as an important aspect of material hardship. For example, some researchers at the Meeting noted that personal safety and security (e.g., the potential for being a victim of crime) are important aspects of material hardship. It was also noted that some European counterparts measure hardship with regard to social inclusion in the community; the more connected a household is to the community, the more likely the household can rely on others to help meet needs and avoid hardship. Additionally, some researchers noted that insufficient access to information determined by individuals' lack of connectedness to the community (e.g., access to libraries, computers, and telephones) can also be a significant hardship. Lastly, participants noted that additional domains of hardship (pertaining to settings) might include: access to affordable, reliable, and high quality childcare, and the quality of schools that children attend.

Discussion Session V: Concrete Measures

Discussion Questions

- 5.1 Based on the criteria discussed this morning, what housing-related concepts should be included in material hardship measures and what concrete measures should be used to measure housing hardship?
- 5.2 Considering the health-related questions currently asked in surveys of low-income populations and the forthcoming handout on health-related concepts and measures and the criteria discussed this morning, what health-related concepts should be included in a material hardship measure?
- 5.3 To what extent can housing and health discussions serve as case examples for the overall approach of applying criteria to select concepts / sub-domains and concrete items to include in measures of material hardship?

Discussion - Housing

Todd Richardson (U.S. Department of Housing and Urban Development) launched the discussion by presenting six measures of housing need that are being used in HUD's Moving to Opportunity study: *homelessness*; *housing quality*; *overcrowding* (typically measured by dividing the number of persons in a home by the number of rooms); *housing cost burden*; *housing security* (the main components of the index relate to problems paying utility bills, utility shut-offs, problems paying rent, eviction threat, actual eviction, and relations with landlords); and *neighborhood quality*.

Following the presentation, the group continued its discussion of how community-based problems relate to material hardship measurement. (Also see previous section on *Setting*.) Specifically, participants noted that it is difficult to examine housing-related hardships without understanding community context; that is, both household and community markers are needed. However, participants were unclear as to whether this was best done through asking the household about its community, or by linking survey data to administrative data about the community characteristics.

Some participants emphasized that it is important to see hardship, in particular housing-related hardships, as a continuum based on intensity. Alternatively, others thought that it would be important to focus on the most severe hardships since they are most likely to be "face valid" to the public.

Discussion - Health

Genevieve Kenney (The Urban Institute) and Jim Kirby (Agency for Healthcare Research and Quality) initiated the group's discussion on the role access to health care should play when considering material hardship measurement. Similar to the discussion on housing, they shared the following list of possible working definitions, or concepts, that might be used to develop or assess measures of health care access: *unmet need and delays in receiving care*; *having a usual source of care*; *health insurance coverage*; *perceptions of access*; and *health care utilization*.

Roundtable participants reiterated that they felt it was important to know or understand the reasons behind a situation before labeling it a hardship. In terms of access to health care, an example given was the case of not going to the doctor. The group agreed that there could be a number of different reasons unrelated to financial distress that could account for why an individual did not visit a doctor. Researchers involved with the National Survey of America's Families (NSAF) noted that they found it very difficult to code reasons for not seeking medical care when it was needed.

Some participants questioned what constitutes lack of access to health care. For example, such a definition could include dental care, over the counter medications, prescription drugs, and eyeglasses. The group acknowledged that all were valid, but did not come to consensus as to which should be considered when measuring hardship.

The health analysts at the Roundtable noted that they did not usually look at measures of health care access as a material hardship, or as part of a broader measure of material hardship. They found the discussion to be quite interesting, however, and it gave them a different angle from which to examine some of their survey measures. Likewise, housing analysts at the Meeting noted that the broader discussion of material hardship was helpful for their own work in conceptualizing housing needs.

Discussion Session VI: What Unanswered Questions Are Answerable and Recommendations for Next Steps

Generally speaking, Roundtable Meeting participants identified two broad categories of “next steps” that could be pursued within the context of the Material Hardship project.

1. Additional definitional/theoretical work that focuses on examining what is meant by material hardship and how it could be measured in the context of low-income families and children (e.g., what constitutes meeting a family’s basic needs in American society or what families define as being normative).
2. Further research and analysis with material hardship measures that have been used in large surveys (e.g., SIPP, PSID, NSAF and SPD). This research would focus on how these measures perform as indicators of material hardship and how they might be improved or augmented, with the intent of evaluating existing measures to determine if they are appropriate as a baseline or starting point for constructing a composite material hardship measure or list of individual measures within specific domains.

Roundtable Participants’ Specific Recommendations

A. Additional Theoretical/Definitional Work

The following were suggested as potential questions for further theoretical/definitional work in the form of commissioned papers:

- What is the theory underlying material hardship and basic needs measurement and how may these theories be applied in the U.S.?
- What constitutes adult and child basic needs from a normative societal perspective (e.g., how do Americans understand and define “basic needs”)?
- How do the intensity, severity, and duration of certain types of material hardships affect long-term family and child well-being outcomes?
- What criteria should be applied when developing or evaluating survey questions used to measure material hardship (e.g., subjective vs. objective, and concrete vs. attitudes)?
- What does the literature tell us about the known relationships between measures of material hardship (e.g., food insecurity and evictions), and between material hardship measures and other poverty indicators (e.g., housing insecurity and income)?

B. Additional Work With SIPP and Other Major Surveys

Roundtable participants also suggested that additional work with the SIPP and other existing surveys (e.g., NSAF, PSID, SPD) might contribute valuable information on the adequacy and appropriateness of existing material hardship measures. Specific suggestions included:

1. Additional reliability and validity tests of SIPP questions related to material hardship (e.g., those included in the SIPP’s Basic Needs Topical Module).

2. An assessment of the types of material hardship questions asked in the SIPP (in particular) and also possibly the NSAF, PSID and SPD. For example:
 - Which questions are most important for measuring material hardship?
 - What, if any, additional data should be collected to provide a more complete picture of material hardship (e.g., add questions about transportation)?
 - Which questions need improvement?
 - Should follow-up questions that gather additional information on intensity or duration be added?
3. Empirical analyses that examine relationships between measures of material hardship on the SIPP (e.g., food insecurity and evictions), and between material hardship measures and other poverty indicators (e.g., income). Roundtable participants also noted that these types of analysis could also be applied to surveys other than the SIPP.

C. Other Suggestions

The group also suggested the following as possible next steps:

1. Conduct further research as to what constitutes meeting a family's basic medical and health needs.
2. Examine what specific or unique material hardships are faced by children.

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Meeting Agenda

Roundtable on Measuring Material Hardship

February 20, 2002

Morning Session

8:30-9:00 a.m.

Registration

Abt Associates Inc. Office at 1110 Vermont Ave. NW Suite 610,
Washington D.C.

9:00-9:30 a.m.

Project Overview and Meeting Goals

Julia Isaacs, ASPE / DHHS

9:30-10:15 a.m.

Discussion Session I: Underlying Constructs Behind Material Hardship
Measurement

- A. **What are we measuring?**
- B. **Why should we measure material hardship among low-income families and children?**

Facilitator: Julia Isaacs, ASPE / DHHS

Lead Discussants: Susan Mayer, The University of Chicago
Sandra Danziger, University of Michigan

10:30-11:15 Discussion Session II:

Criteria for Developing Material Hardship Measures

Facilitator: Julia Isaacs, ASPE / DHHS

Lead Discussants: Connie Citro, Committee on National Statistics
Sondra Beverly, University of Kansas

11:15 a.m. -

12:15 p.m. Discussion Session III:

**Analytic Strategies for Developing Material Hardship
Measures**

Facilitator: Chris Hamilton, Abt Associates Inc.

Lead Discussants: Kurt Bauman, US Census Bureau
Craig Gundersen, ERS / USDA

12:15 – 1:15 p.m. Lunch

Meeting Agenda

Roundtable on Measuring Material Hardship

February 20, 2002

Afternoon Session

1:15 - 2:00 p.m. Discussion Session IV: Identifying the Key Dimensions of Material Hardship

Facilitator: Tammy Ouellette, Abt Associates Inc.

Lead Discussant: Andrew London, Kent State University

2:00 - 3:00 p.m. Discussion Session Va: Housing and Related Measures

Facilitator: Tammy Ouellette, Abt Associates Inc.

Lead Discussants: Todd Richardson, HUD
Laura Lein, University of Texas

3:15 - 4:00 p.m. Discussion Session Vb: Health and Other Measures

Facilitator: Tammy Ouellette, Abt Associates Inc.

Lead Discussants: Genevieve Kenney, The Urban Institute
Jim Kirby, AHRQ / DHHS

4:00 - 4:30 p.m. Discussion Session VI: What Unanswered Questions are Answerable and Recommendations for Next Steps

Facilitator: Julia Isaacs, ASPE / DHHS

Meeting Adjourns at 4:30 p.m.