

**"Enough for a Family to Live On?"--  
Questions from Members of the American Public  
and New Perspectives from British Social Scientists**

by

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The theme of this year's APPAM conference is the relationship between public policy analysis/research and public policy. APPAM has encouraged the participation of both policy analysts and policy practitioners in the conference. Implicit in this theme and this encouragement is the idea that public policy issues may look different to analysts and practitioners, and that both groups may benefit by sharing their different perspectives on public policy issues.

Policy issues may also look different to persons at different levels of the public policy system--for instance, the lower level at which policy is carried out, as compared with the higher level at which policy is made and modified. Similarly, policy issues may also look different to members of the general public--another group with at least some interest in public policy issues.

### Questions from Members of the American Public

The writer of this paper is a civil servant--a policy practitioner, if you will, but one who works at the level at which policy is carried out, not the level at which policy is made. I prepare the annual update of the poverty guidelines<sup>1</sup>--the administrative (program-eligibility) version of the federal poverty measure. I answer public inquiries about the guidelines, as well as questions about the development and history of poverty lines in the United States. The questions that I receive come from other policy practitioners (both public and private), policy researchers and analysts, and members of the general public.

One of the public policy issues that is sometimes raised in inquiries I receive from the public is the issue of income inadequacy. For many practitioners (particularly at higher levels) and many researchers, this issue might take a rather abstract form. However, for some of the people who put questions to me, this issue takes the form "How much does it cost a family to live?" or "How much is enough for a family to live on?"

From time to time I get questions from personnel in companies, nonprofit organizations, or local governments who have been directed to assess the level of wages paid by their organizations. Sometimes I receive inquiries from local practitioners or researchers who are seeking to establish an amount for a living wage for a locality, and want information about the official poverty line in connection with that. I have gotten inquiries from several companies, a public pension fund, a labor union, and a church group that were interested in assessing the level of retirement pensions that they paid. And during the last several years I have occasionally received e-mail messages or letters from members of the general public with more personal concerns:

- o "What minnimum [sic] amount of money would it take for such a family [two adults and three children in Dallas, Texas] to meet bare necessities (food, clothing, shelter, etc.)?" (1997 letter)
- o "I am a single Mother and work two jobs which equal about \$18,000 per year. We barely afford rent, electric, cable, phone, water, food, taxes and vehicle expenses. [But] the federal poverty level is \$11,060 [the 1999 poverty guideline for a family of 2]. My daughter and I have zero, no, zilch money left after paying the bills for medical or clothing. How on earth does the Federal Government expect us to pay for cars....There just is NOT enough money left at the end of the month for a car payment....Please tell me...how they expect people to live on under \$20,000 per year." (1999 e-mail message)
- o "...what [are] the expenses...for a family of six. (2 adults and four children.)...I am trying to help a couple with four children." (2001 e-mail)

There is, of course, no single standard answer to questions of this type from organizations and individuals. My response to a given question depends on the specifics of the question and the broader context within which it is being asked. The issue is not an easy one to respond to, especially since this particular form of it has not been the subject of as much research in this country as one might wish.

I would like to use this paper as an opportunity to more fully address this question--"How much does it cost a family to live?"--as a public policy issue, since it is a question to which some of the members of the public who phone me and write to me want answers. For this conference, we are encouraged to look at issues using perspectives that cross disciplines and national boundaries. Accordingly, I will discuss four approaches to determining or estimating a socially acceptable minimum standard of living that have been developed or put into practice in recent years mainly by British social scientists, the majority of them working in the areas of social policy [a separate academic discipline in Britain] and sociology. (The principal exception to this generalization is the "subjective" poverty line approach, which was pioneered by Dutch economists.) Relatively few American policy practitioners and policy researchers are familiar with several of these approaches, and I hope that this paper may modestly reduce that lack of familiarity.

#### The Approaches to be Discussed--General Background

The approaches to determining a socially acceptable minimum standard of living (poverty) that I will discuss may be labeled

as follows: 1) the "consensual deprivation indicator" approach; 2) the budget standards approach; 3) the "subjective" poverty line approach; and 4) the "consensual budget standards" approach. (Terminology for the first and last of these is still fluid, as they have only been developed in the last two decades.) My discussion of these four approaches is essentially an expansion of a framework in recent work by British poverty researcher John Veit-Wilson.<sup>2</sup>

Without going into the detail that the subject deserves, I will note that the conceptual context within which many British social scientists consider poverty definition and measurement differs considerably from the analogous conceptual context for many American policy researchers and policy practitioners.<sup>3</sup> These British social scientists have generally been strongly influenced by the following conceptual definition of poverty stated in 1979 by Peter Townsend, the dean of post-World-War-II British poverty researchers:

Poverty can be defined objectively and applied consistently only in terms of the concept of relative deprivation....The term is understood objectively rather than subjectively. Individuals, families and groups in the population can be said to be in poverty when they lack the resources to obtain the types of diet, participate in the activities and have the living conditions and amenities which are customary, or are at least widely encouraged or approved, in the societies to which they belong. Their resources are so seriously below those commanded by the average individual or family that they are, in effect, excluded from ordinary living patterns, customs and activities.<sup>4</sup>

(A summarized version of this definition included the sentence, "People are deprived of the conditions of life which ordinarily define membership of society."<sup>5</sup>) A number of these social scientists hold that it is possible to empirically test or refute hypotheses about the existence of socially defined standards (held by a majority of a society's members) for the minimum adequacy of resources/income or for social participation (participation in society), as well as hypotheses about the range of resources needed to meet these socially defined standards and the boundary--the poverty level--below which resources are insufficient to meet these standards.<sup>6</sup>

### The "Consensual Deprivation Indicator" Approach

The approach that I am calling the "consensual deprivation indicator" approach<sup>7</sup> was first implemented by Joanna Mack and Stewart Lansley in the 1983 Breadline Britain survey, conducted by Market and Opinion Research International (MORI) for the

London Weekend Television (LWT) series *Breadline Britain*.<sup>8</sup> This approach was subsequently used by Mack, Lansley, David Gordon, Christina Pantazis, and colleagues in the 1990 Breadline Britain survey, conducted by MORI for the LWT series *Breadline Britain in the 1990s*, with additional funding from the Joseph Rowntree Foundation for analysis of the data<sup>9</sup>; and by Gordon, Pantazis, Peter Townsend, and colleagues in the 1999 Poverty and Social Exclusion Survey of Britain, funded by the Joseph Rowntree Foundation and conducted by the Office for National Statistics.<sup>10</sup>

The "consensual deprivation indicator" approach as implemented in Mack and Lansley's 1983 Breadline Britain survey was a modified version of the relative deprivation poverty measurement methodology used by Peter Townsend in his landmark 1979 study of poverty in Britain (which was based on a survey conducted in 1968-1969).<sup>11</sup> There are two major differences between the two methodologies:

- o In the Townsend methodology, the choice of deprivation indicators finally used (from a preliminary set of indicators) was made by the investigator. In the Mack and Lansley methodology (as explained below), that choice was made by the general public--more specifically, by a nationally representative sample of the general public.
- o When a survey respondent indicated that s/he did not have an item or activity in the final list of deprivation indicators, Mack and Lansley--unlike Townsend--asked the respondent if s/he did not have the item because s/he did not want it, or because s/he did want it but could not afford it.

Although the "consensual deprivation indicator" methodology of measuring poverty has sometimes been confused with the study of material hardship indicators (as exemplified by the work of Mayer and Jencks in the U.S.), it should be stressed that despite some superficial similarities, the latter is not a variant of the former; see Appendix B.

In implementing the "consensual deprivation indicator" methodology in the 1983 Breadline Britain survey, Mack and Lansley defined poverty as "an enforced lack of socially perceived necessities."<sup>12</sup> They and their successors have operationalized these terms on the basis of survey responses from nationally representative samples of the British population.<sup>13</sup>

Mack and Lansley (and their successors) presented survey respondents with a list of "items indicative of various aspects of our way of living"--goods, physical amenities, and social activities. They noted that these items "were seen not only in terms of personal 'consumption' but also, following Townsend, in terms of *social activities*" [emphasis in original]. They tested

"only those aspects of life facilitated by access to money..."; they thus excluded health care and education, since one generally did not have to pay for those public services in Britain during the early 1980's. Examples of items that they presented (and that a majority of respondents designated as necessities) are "a refrigerator," "heating to warm living areas of the home if it's cold," and "celebrations on special occasions such as Christmas." They asked respondents whether each item was part of "the living standards you feel all adults [or families with children, for child-related items] should have in Britain today"--whether they thought each item was one "which you think [is] necessary, and which all adults [or families with children] should be able to afford and which they should not have to do without...."<sup>14</sup> (It is methodologically significant that they asked about items that all adults or families should have, rather than asking respondents what they thought poor people should have.<sup>15</sup>)

Mack and Lansley (and their successors) classified an item as a socially perceived necessity if more than 50 percent of survey respondents (after weighting to make the sample representative of the whole population) identified it as being a necessity. "While there is inevitably an element of arbitrariness at the margins for any cut-off point, a straight majority seems as fair an interpretation of a consensual view as any."<sup>16,17</sup>

In the 1983 Breadline Britain survey, most of the 22 items in the final list of necessities related to adults, but four related to children under 16. (Examples included "three meals a day for children" and "toys for children.") Similarly, in the 1990 Breadline Britain survey, seven of the 32 items in the final list of necessities related to children. In the 1999 Poverty and Social Exclusion Survey, by contrast, separate lists of necessities were developed for adults and for children.<sup>18</sup>

Gordon and Pantazis did a statistical analysis for reliability of the final list of necessities in the 1990 Breadline Britain survey, using Cronbach's Coefficient Alpha in the context of the Domain-Sampling Model. For the questions about the 32 necessities, Cronbach's Coefficient Alpha was 0.8754. "...the Alpha Coefficient score of 0.87 for the Breadline Britain questions indicates that they have a high degree of reliability and also that effectively similar results would have been obtained if any other reliable set of 32 deprivation questions had been asked instead." A similar analysis of the list of adult necessities in the 1999 Poverty and Social Exclusion Survey found a Cronbach's Coefficient Alpha of 0.8853--indicative of a highly reliable index; for the list of children's necessities, the corresponding figure was 0.8339.<sup>19</sup>

For each of the items on the list of necessities, Mack and Lansley (and their successors) asked respondents if they had the

item, if they did not have it because they did not want it, or if they did not have it because they could not afford it. (For child-related items, they asked the parents rather than the children themselves.) The respondent's deprivation score--the number of necessities that a respondent lacked because s/he could not afford them--was used to determine the respondent's poverty status.<sup>20</sup>

In the 1983 Breadline Britain survey, Mack and Lansley set the poverty line at a deprivation score of three or more necessities--that is, a household whose respondent had a deprivation score of three or more necessities was counted as poor. In an extensive analysis of types and numbers of deprivations experienced, Mack and Lansley had found that the effect of lacking only one or two necessities was relatively marginal; the only area in which a majority of this group cut back was leisure activities. By contrast, the effects of lacking three or more necessities were widespread, with multiple areas of life being affected; most of this group cut back on food, some cut back on clothing, on heating, and on social obligations, or lived in bad housing, while most cut back on leisure activities and non-necessities (items on the preliminary list which were not designated by a majority as necessities).<sup>21</sup> Subsequently, a regression analysis confirmed the three-or-more-necessities-lacked poverty line for the 1983 survey (by showing that this was the point which maximized the variation in income between the multiply deprived and less deprived groups while minimizing the variation of income within each group). In the 1990 Breadline Britain survey, discriminant analysis showed that three-or-more-necessities-lacked was the optimum poverty line for households. In the 1999 Poverty and Social Exclusion Survey, poverty was determined not for the household as a whole but separately for adults and children, based on separate lists of necessities. For adults, general linear models (ANOVA and logistic regression) both showed that the optimum position for the poverty line was at two or more necessities lacked. For children, discriminant function analysis showed that the optimum position for the poverty line was at one or more necessities lacked; however, because a large proportion of children poor by this definition lacked one specific item (a holiday away from home once a year), the analysis also used a more restrictive deprivation threshold of two or more necessities lacked.<sup>22</sup>

Besides Britain, the "consensual deprivation indicator" approach has been used in surveys in Ireland, Belgium, Holland, Germany, Denmark, Sweden, Finland, and Vietnam.<sup>23</sup>

In Ireland, researchers at the Economic and Social Research Institute have worked with a set of 24 deprivation indicators drawn in large part from Mack and Lansley's list of 22 socially perceived necessities. The researchers applied factor analysis to their 24 indicators and found that they clustered into three



groups: "basic" indicators, "housing and durables" indicators, and "other" indicators. They proceeded to do exploratory work with poverty measures which combined relative income poverty lines (various percentages of average equivalent disposable income) and the eight "basic" deprivation indicators.<sup>24</sup> In 1997, the Irish government adopted a National Anti-Poverty Strategy with a target for reducing poverty as measured by poverty measures combining two relative income poverty lines and the "basic" deprivation indicators.<sup>25</sup>

Two Irish researchers have also used the deprivation indicators drawn largely from Mack and Lansley's list to begin exploring the question of whether persons in the same household may be experiencing different levels of deprivation--specifically, whether married women are more deprived than their husbands.<sup>26</sup>

Although the "consensual deprivation indicator" approach generally uses deprivation indicators rather than incomes as such to set poverty lines, the correlation of deprivations with low incomes plays an important part in this approach.<sup>27</sup> From a broadly similar perspective (although not using the specific "consensual deprivation indicator" methodology), a recent Canadian report examined 27 elements of child development and how outcomes in these areas vary by family income. Based on their research, the authors suggested that a child poverty line should be set between \$30,000 and \$40,000 (annual income in Canadian dollars) for a family of four, since the risk of negative child outcomes and the likelihood of poor living conditions were noticeably higher among children in families with incomes below these levels; to look at it from the other direction, "the risks of poor developmental outcomes and living conditions decline steeply as families approach these income levels."<sup>28</sup> Along the same line, an American statistician has called for (American) social scientists to study empirically the relationship between different family income/resource levels and undesirable social outcomes in such areas as family stability and instability, health status and mortality, food insecurity, and school performance.<sup>29</sup>

### The Budget Standards Approach

"A budget standard is a specified basket of goods and services which when priced can represent a particular standard of living. Budgets can be devised to represent any living standard."<sup>30</sup> The term "budget standard(s)" has been used particularly in recent literature in Britain and Australia. In the older American literature (from at least the 1920's through the 1960's) the term "standard budget" was used for the same concept.<sup>31</sup> (For brief comments on the use of budget

standards/standard budgets in other periods and other countries, see the end of this section.)

Since budgets can be developed to represent any standard of living, the use of the budget standards approach does not by itself guarantee that the result will be a socially acceptable minimum standard of living.<sup>32</sup> Accordingly, if one does have the goal of developing a budget that represents a socially acceptable minimum standard of living, it is probably advisable to take conscious, specific steps towards accomplishing that goal (as do both the budget standard studies discussed below).

In an unpublished 1993 paper prepared for the National Research Council's Panel on Poverty and Family Assistance, American poverty researcher Harold Watts distinguished several variants of the budget standards approach. In one variant, a detailed, comprehensive list of budget items is drawn up--for instance, individual clothing items are specified, rather than simply having a "clothing" category. (Watts called this the "market basket approach," while the Poverty Panel termed it the "detailed budget approach.") In another variant, expenditure amounts are specified for a relatively small number of consumption categories; the expenditure amount for an individual category is often a single aggregate, although it can also be based on a detailed list of items--for instance, one of the U.S. Department of Agriculture's food plans. (Watts termed this approach "category standards," while the Poverty Panel called it the "categorical approach.")<sup>33</sup> Both budget studies discussed below followed the detailed budget approach.<sup>34</sup>

In 1993 a group of persons from the Family Budget Unit, under the direction of social policy researcher Jonathan Bradshaw, published a book presenting budget standards at two different levels for the United Kingdom. The project was funded by the Joseph Rowntree Foundation. The book presented budget standards for six different household types at a "modest but adequate" standard of living and at a "low cost" standard. The "modest but adequate" standard was described as "a level of living which is sufficient to 'satisfy prevailing standards of what is necessary for health, efficiency, the nurture of children and for participation in community activities.'" (The term was taken from the U.S. Bureau of Labor Statistics' City Worker's Family Budget, published in 1948.) No precise definition of the "low cost" standard was given, but it was described as not being a "minimum budget," and as including "adequate health care, a healthy diet, a warm shelter with a minimum space for each family member and opportunity to participate in community activities." To construct these budgets, the researchers consulted experts on various commodities, surveys and reports on consumers' actual behavior in various areas, standards recommended for various areas (e.g., housing, food) by official groups, and earlier budget standards from other countries, as well as using their own

judgments. They also presented the modest but adequate budget to groups of consumers, asking their opinions and then adjusting the budget on the basis of feedback from the consumer groups. The researchers followed several general guidelines in determining the contents of the budgets: If more than 50 percent of a certain type of household (in the general population) had a certain commodity, then it was generally included in the "modest but adequate" budget for that type of household. If more than 75 percent of the population owned an item--or if more than two thirds of the general population believed an item to be a necessity (according to the Breadline Britain 1990 survey described above)--then it was included in the "low cost" budget. The reason for these guidelines (as well as for the consultation with consumers) will have been an effort to ensure that the budgets met a "socially accepted standard." After the budgets were developed, the researchers compared them with data from the Family Expenditure Survey (FES)--presumably in part for reasons similar to the preceding; however, the researchers had not used FES data to develop the budgets, since they did not want the budgets to reflect consumption behavior constrained by insufficient income.<sup>35</sup>

In 1998 the Budget Standards Unit (BSU) of the Social Policy Research Centre of the University of New South Wales, under the direction of social policy researcher Peter Saunders, published a report presenting budget standards at two different levels for Australia. The report was the Consultant's Report for a project commissioned by the (Australian) Department of Social Security. The report presented budget standards for twelve basic household types (26 different types after differentiation for labor force status and housing tenure). The project took as its starting point the budget standards developed by Bradshaw and associates for the United Kingdom, modifying them to suit Australian circumstances; Bradshaw served as external consultant to the project. Like the British project, the BSU project developed budget standards at a "modest but adequate" standard and at a "low cost" standard. "It is...important to note that both standards embody not only appropriate levels of *material consumption* sufficient to satisfy needs for food, housing and so on, but also make allowance for *participation in relevant socially-endorsed activities*" [emphasis in original]. The modest but adequate standard was described as "one which affords full opportunity to participate in contemporary Australian society and the basic options it offers. It is seen as lying between the standards of survival and decency and those of luxury as these are commonly understood." The low cost standard "represents a level of living which may require frugal and careful management of resources but would still allow social and economic participation consistent with community standards and enable the individual to fulfil community expectations in the workplace, at home and in the community. Whilst it should not be seen as a minimum standard, the low cost standard is intended to describe a

level below which it becomes increasingly difficult to maintain an acceptable living standard because of the increased risk of deprivation and disadvantage." The BSU researchers secured advice from a Budget Standards Unit Steering Committee which included experts in fields relating to the budgets and their components, members from two leading non-government welfare agencies, and employees of the Department of Social Security. The researchers made use of legislation relating to minimum standards for housing and the recommended dietary intakes developed by the National Health and Medical Research Council, viewing these as existing normative judgments embodying prevailing community standards. The researchers also secured feedback from focus groups (organized independently by the two non-government welfare agencies, not by the BSU) about the articulation of the budget standards, the items to be included in the budgets, and initial costings of the budget. "The main aim of the focus group discussions was thus to provide an initial external assessment of the budgets so that they could be modified to conform more closely with prevailing community standards, attitudes and behaviour." The researchers followed several ownership rules in determining the contents of the budgets: items owned or activities undertaken by at least 50 percent of the population were incorporated into the modest but adequate budgets, while those owned or undertaken by at least 75 percent of the population were incorporated into the low cost budgets. These rules were used because "the legitimacy of budget standards depends in part on the extent to which they reflect current aspirations, values and patterns of community behaviour." However, "[e]xceptions were made to the 50/75 per cent rule on normative grounds in some instances, in order to ensure that the budget standards do not simply reflect existing patterns of inequality in society." The researchers also consulted data from the Household Expenditure Survey and similar relevant statistics while developing the budgets. However, in many cases the budgets were not modified to bring them closer to such statistical data on the grounds that the statistical data reflected behavior constrained by insufficient resources; the budgets were "designed to reflect what is *needed*, not what can be *afforded*" [emphasis in original].<sup>36</sup>

Standard budgets/budget standards are traditionally seen as being developed by "experts," without any input from the general public.<sup>37</sup> However, it is of interest that both budget standards studies just described secured feedback from consumer groups or focus groups--that is, members of the general population. By doing so, they moved a modest step in the direction of the "consensual budget standards" approach described below (although the 1994 Middleton et al. study had not been published when Bradshaw and colleagues did their work, and Saunders and colleagues appear not to have been aware of it).

Standard budgets/budget standards have been developed in a number of different periods and different countries.

In the United States, some sort of standard budget appears to have been referred to as early as 1877, while the Iowa Bureau of Labor Statistics published a 33-item standard budget in 1891. Standard budgets (representing several different standards of living) flourished between about 1902 and 1920, during the Progressive Era. Standard budgets continued to be developed during the 1920's and 1930's, but on a somewhat more routinized basis.<sup>38</sup> After World War II, the U.S. Bureau of Labor Statistics developed and updated standard budgets (all at standards of living higher than poverty) between the late 1940's and the early 1980's.<sup>39</sup> (Mollie Orshansky's poverty thresholds were not a standard budget, as noted in endnote 33.) In general, though, the standard budget methodology fell into disfavor in the United States during the 1960's, 1970's, and 1980's.<sup>40</sup> In the early 1990's, however, several pathbreaking standard budgets were published<sup>41</sup>, and since then a number of researchers and advocates have developed basic needs budgets for working families in various states and localities in the context of the Living Wage movement and in the context of welfare-to-work activities.<sup>42</sup> Most of these recent budgets were developed using the "categorical approach" mentioned above rather than the detailed budget approach used by the British and Australian budget studies described above. (Note that the Panel on Poverty and Family Assistance's 1995 proposal for a new U.S. poverty measure is not a standard budget, since it is not based on a list of specific goods and services and their prices.)

In Britain, Seebom Rowntree published his "primary" poverty line--a budget standard--in 1901.<sup>43</sup> Other budget standard poverty lines were published between that date and 1951, usually as parts of social surveys.<sup>44</sup> During the post-World-War-II period, however, budget standards became "deeply unfashionable" in Britain, largely because they had become associated with "concepts of minimum subsistence and absolute definitions of poverty...."<sup>45</sup> With the 1993 publication of the study by Bradshaw and colleagues, though, that situation has changed significantly.<sup>46</sup> In 1998 and 2000, the Family Budget Unit published "low cost but acceptable" budgets for two different population groups.<sup>47</sup>

In Australia, budget standards were published in 1920 and 1952<sup>48</sup>, and another budget standard was developed about 1970.<sup>49</sup>

In Canada, a handful of standard budgets were published between 1922 and 1943.<sup>50</sup> In recent years, various local social agencies in Canada have developed standard budgets.<sup>51</sup> (Statistics Canada's Low Income Cut-Offs are not a standard budget, since they are not based on a list of specific goods and services and their prices.)

In western Europe, countries in which standard budgets have been developed include Norway, Sweden, the Netherlands, and Germany. In Sweden, the budget prepared by the National Board for Consumer Affairs constitutes the nation's Minimum Income Standard, while in Norway, budgets have been used to evaluate the adequacy of that nation's Minimum Income Standard.<sup>52</sup>

In eastern Europe, countries in which standard budgets have been developed at different times include the Soviet Union, Czechoslovakia, Hungary, and Poland.<sup>53</sup>

Other countries in which budget standards have been developed include Malaysia and Hong Kong.<sup>54</sup>

### The "Subjective" Poverty Line Approach

Among the four approaches discussed in this paper, this approach is much more well-known to Americans than the "consensual deprivation indicator" approach and the "consensual budget standards" approach.<sup>55</sup>

There are four variants of the "subjective" poverty line approach: the Subjective Poverty Line (SPL) (in a more specific sense), the Leyden Poverty Line (LPL), the Centre for Social Policy (CSP) poverty line, and a British variant which does not yet have an acronym. The SPL and LPL were developed by economists at the University of Leyden in the Netherlands in the mid-1970's. The CSP poverty line was developed by Herman Deleeck and associates at the Centre for Social Policy at the University of Antwerp in Belgium about 1976. The British variant was developed by Peter Townsend and colleagues during the mid-1980's. As indicated above, this is the one approach discussed in this paper which originated entirely outside the British sociology/social policy tradition (although a British variant was later developed).<sup>56</sup>

The Subjective Poverty Line (SPL) is derived from survey responses to what has been termed the Minimum Income Question (MIQ); in the original 1975 survey, the question wording was as follows [translated into English]: "We would like to know which net family income would, in *your* circumstances, be the absolute minimum for you. That is to say, that you would not be able to make both ends meet if you earned less" [emphasis in original]. [Note that the question did not include the words "poor" or "poverty."] The SPL for different family types is set (by regression) at the point where the answer to the MIQ equals actual family income.<sup>57</sup>

The Centre for Social Policy (CSP) poverty line is based on the Minimum Income Question and on an additional question which asks how well recipients can make ends meet, supplying a range of

answers from "with great difficulty" to "very easily." For the subset of respondents who choose the answer "with some difficulty," the lower of their actual household income and their answer to the MIQ is selected; the CSP poverty line for different household types is based on averages of these amounts.<sup>58</sup> Although the CSP poverty line is unofficial, it has been tacitly accepted by the government of Belgium as a Minimum Income Standard.<sup>59</sup>

The Leyden Poverty Line (LPL) is derived from survey responses to the Income Evaluation Question, in which respondents are asked to give household income amounts corresponding in their judgment to a range of evaluative terms--for instance, a set of six terms ranging from "very bad" to "very good." These terms can be converted to a numerical welfare level scale ranging between 0 and 1. For each household type (differentiated by size and possibly by other characteristics), survey responses can be aggregated so that an income figure can be associated with each evaluative term, or with welfare levels such as 0.4 and 0.5. The researcher or other data user can then choose the welfare level at which s/he wishes to set the poverty line--for instance, at 0.5 (halfway between "sufficient" and "insufficient"), or at 0.4 (slightly below "insufficient").<sup>60</sup>

Beginning in 1985, Peter Townsend and colleagues developed a British variant of the "subjective" poverty line approach and have used it in a number of surveys. (This variant has occasionally been referred to as the "population average method.") They first applied this variant in the 1985-1986 Booth Centenary Survey of Londoners' Living Standards, funded by the Greater London Council (before its abolition) and the Poverty Research (London) Trust, and in a related study conducted in 1987 in Islington for the Islington Borough Council. Townsend, David Gordon, Jonathan Bradshaw, and Brian Gosschalk added questions using this variant to national surveys of Britain conducted by Market and Opinion Research International (MORI) in 1996 and 1997. Townsend, Gordon, and colleagues included questions using this variant in the 1999 Poverty and Social Exclusion Survey of Britain. (In the 1997 MORI survey and the 1999 Poverty and Social Exclusion Survey, they also added questions to identify income amounts for "absolute poverty" and "overall poverty" as defined by the United Nations' 1995 World Summit for Social Development.) In the 1996, 1997, and 1999 surveys, the "poverty" question was worded as follows: "How many pounds a week, after tax, do you think are necessary to keep a household such as the one you live in, out of poverty?" (There were only minor wording variations from this in the Greater London and Islington surveys.) The researchers commented that in a question being used to construct "subjective" poverty lines, it seemed "more useful" to use the word "poverty" rather than "euphemisms for poverty...such as 'making ends meet' or 'living decently'." Rather than applying SPL-style regressions to the data, the

researchers calculated poverty lines for different household types by taking the average of the responses to the "poverty" question from households of a given type; they called this the "simplest and arguably most democratic method of producing a 'subjective' poverty line...." In the Greater London survey, Townsend and colleagues also constructed poverty lines for different household types using a relative deprivation methodology (apparently non-"consensual"); when these poverty lines were compared with the "subjective" poverty lines for the same household types from the Greater London and Islington surveys, the figures showed "remarkably close agreement" in almost all cases.<sup>61</sup>

The SPL, LPL, and CSP variants of the "subjective" poverty line approach have been used in surveys in a number of countries--for instance, eight countries of the European Community<sup>62</sup>, five countries and two subnational regions of the European Community<sup>63</sup>, Australia and Sweden<sup>64</sup>, the United States and the Netherlands<sup>65</sup>, Canada<sup>66</sup>, and the United States<sup>67</sup>.

The Minimum Income Question used in the SPL and CSP variants of the "subjective" poverty line approach may have been influenced by a question that has been asked by Gallup Poll organizations in several English-speaking countries since the 1940's.<sup>68</sup> In the United States, since January 1946, the American Institute of Public Opinion's Gallup Poll has repeatedly asked the following question: "What is the smallest amount of money a family of four (husband, wife, and two children) needs each week to get along in this community?" (This question is often referred to as the "get-along" question.) In Canada, at least since 1973, the Canadian Institute of Public Opinion has repeatedly asked essentially the same question: "Generally speaking, what do you think is the least amount of money a family of four--husband, wife and two children--needs each week to get along in this community?" In Australia, since February 1945, the Morgan Gallup Poll has repeatedly asked the following question: "In your opinion, what is the smallest amount a family of four - two parents and two children - need a week to keep in health and live decently - the smallest amount for all expenses including rent?"<sup>69,70</sup> (Note that these Gallup questions do not include the words "poor" or "poverty.")

These Gallup questions were not used to calculate poverty lines for some decades after they began to be asked.

In Australia, Allan Halladay used the 1969 response to the Morgan Gallup Poll (MGP) question to develop one of six alternative poverty lines that he used in a study of large families in Sydney.<sup>71</sup> Two decades later, Peter Saunders and Bruce Bradbury used the July 1987 response to the MGP question to calculate a poverty line for a four-person family using the SPL methodology. (They did note that "the terms 'health' and



'decency' [sic] are possibly more ambiguous for current purposes [developing a poverty line] than an evaluation in terms of 'making ends meet'.")<sup>72</sup>

In the United States, the Families USA Foundation commissioned the American Institute of Public Opinion to ask the following question in Gallup Poll samples between July and October 1989: "People who have income below a certain level can be considered poor. That level is called the 'poverty line.' What amount of weekly income would you use as a poverty line for a family of four (husband, wife and two children) in this community?" (The Gallup Poll had asked the "get-along" question in May 1989.) The Foundation decided to commission a new question in place of the "get-along" question "because it is not clear how 'the smallest amount of money a family...needs each week to get along' is related to the poverty line." The average response given to the "poverty line" question was equal to 124 percent of the 1988 official U.S. weighted average poverty threshold for a family of four, while the average response given to the "get-along" question was equal to 173 percent of the 1988 threshold for a family of four.<sup>73</sup> In 1993, Denton Vaughan used the "get-along" responses for the period 1947-1989 plus the response to the 1989 "poverty line" question to construct a "Gallup-based" poverty line series for a four-person family for the 1947-1989 period.<sup>74</sup>

I do not know of any effort to use the Canadian Gallup "get-along" question to calculate a poverty line. However, the Canadian Council on Social Development, a social advocacy group, uses a multi-year comparison between the "get-along" amount and Statistics Canada's Low Income Cut-Offs (LICOs) to suggest that the LICOs are a reasonable poverty line or measure of income inadequacy for Canada.<sup>75</sup> (Statistics Canada has always said that the LICOs are a measure of low income, not a measure or definition of poverty.<sup>76</sup>)

#### The "Consensual Budget Standards" Approach

In 1987, British social policy researcher Robert Walker wrote an article critiquing existing "consensual" approaches to defining poverty. The approaches that he discussed included those here termed the "consensual deprivation indicator" approach and the "subjective" poverty line approach, as well as an approach in which people are asked what level of social assistance benefits they are prepared to fund. Walker accepted the importance that these approaches give to determining poverty lines on the basis of the views of society as a whole, rather than on the basis of the judgments of "experts." However, he argued that these approaches may not do justice to that goal when they attempt to implement it through surveys. Survey respondents "are typically asked for immediate responses to tightly worded

questions about complex and sensitive issues to which few of them will previously have given much thought"; the result may well be "[o]pinions grounded in ignorance" which "are likely to be very unstable." He also noted that "the survey methodology used will not have tapped the interactive process through which informed consensus is forged." Instead, he proposed a modification of the budget standards approach in which a budget would be developed not by a committee of experts but by committees of members of the public in order to "directly determin[e] a socially approved budget standard." Groups of members of the public would be asked to negotiate and agree upon acceptable minimum sets of goods and services. Information including the costs of these goods and services would be fed back to them. The tentative budgets developed would be referred to other groups for evaluation, presumably leading ultimately to final budgets agreed on by all groups.<sup>77</sup>

The "consensual budget standards" approach was developed by Sue Middleton, Robert Walker, and colleagues at Loughborough University's Centre for Research in Social Policy (CRSP), on the basis of Walker's 1987 proposal. This approach was used to develop budget standards for children of various ages as part of the 1994 Family Fortunes study; that study (including the development of the "consensual budget standards" methodology) was funded by the Joseph Rowntree Foundation. Several years later, the States of Jersey<sup>78</sup>, as part of their contribution to the International Year for the Eradication of Poverty, commissioned CRSP to use the "consensual budget standards" approach to develop minimum essential budget standards for all types of households living in Jersey. The distinctive feature of this approach is that budget standards are developed not by academics, professionals, government officials, or civil servants, but by ordinary people--members of the general population. To develop a budget standard for a particular household type (e.g., retired couples or single-parent families), groups of persons from such households are recruited from the general population. (To develop budget standards for children, groups of parents were recruited.) Groups are chosen to include persons from differing social backgrounds and economic circumstances (and from different parts of the country, unless standards are being developed for one jurisdiction only); the goal of the research is to achieve a consensus, and this cannot be done if persons of different socio-economic circumstances are isolated from each other. The groups begin by discussing and agreeing on a definition of "essential minimum"; such definitions are usually adapted from a United Nations definition of an adequate lifestyle--"things which are necessary for a person's physical, mental, spiritual, moral and social well-being." Groups are encouraged to avoid considerations of cost as much as possible, since "as soon as people begin to discuss incomes and costs[,] issues of spending patterns arise. This gives rise to judgements about whether some groups of the population are more 'deserving' than others. Since

the aim of the research is to produce budget standards which apply to **all** people in similar household types, such discussions need to be avoided" [emphasis in original]. In most cases the groups develop and agree on a "case study" of the type of person(s) for whom they are constructing a budget standard, including assumptions about their lifestyle. The groups then discuss, negotiate, and agree upon a list of specific goods and services deemed essential for a minimum living standard for the household type in question. The resulting list is then costed by researchers at stores recommended by the groups, resulting in a draft minimum budget standard. In the final phase, "check-back" groups go over the uncoded list, coming to agreement on any unresolved issues and reaching a final consensus. The strength of the consensus is tested, with researchers giving group members the cost of the final list and its components, and seeing if this information makes group members want to make any changes in the list. In addition, group members are asked to imagine that they have presented the costed budget to the Chancellor of the Exchequer and that he had told them that the nation could not afford to ensure that every person had all the items in the budget; they were asked how they would respond and if they would reduce the budget. (In the case of the budgets for children, "[m]others from all social backgrounds refused to consider reducing any of their lists of essential items, stating firmly that these were an absolute minimum which no child should have to do without.") The final list of items resulting from this phase is costed, producing a final consensually agreed minimum budget standard. In describing the budget standards resulting from this process, the researchers noted that "the agreed poverty lines are not 'wish lists' representing what everyone should be able to have in an ideal world. They are the absolute minimum which people believe to be necessary for a dignified and participatory lifestyle in the communities in which they live." In the case of the budget standards for children, "parents felt that their lists represented an absolute basic minimum, and would have been devastated if this was all their own children had."<sup>79</sup> In the September 14, 1999, meeting of the States of Jersey, in response to a question from a senator, the Vice-President of the Employment and Social Security Committee briefly described the household budgets submitted to that Committee by the Centre for Research in Social Policy earlier that year, and stated that "Some further analysis is currently being undertaken on the report findings which should help in the development of the proposed low income support benefit."<sup>80</sup>

A somewhat similar approach--also inspired by Walker's 1987 article--was used by the (nongovernmental) New Zealand Poverty Measurement Project to develop an unofficial poverty line in that country. This Project was initiated in the wake of social and economic policy changes during the 1980's and early 1990's; it was funded by the New Zealand Foundation for Research, Science

and Technology, and was carried out by three agencies--a business economic research unit, a university public policy department, and a community-based social policy research unit. The Project combined a macro analysis (involving tabulations of data from the Household Expenditure and Income Survey) and a micro analysis. In the latter, independent focus groups of low-income families from different demographic groups were asked to estimate "minimum adequate household expenditure" (the basis for a poverty line) and "minimum expenditure that is fair for households to participate adequately in their community" for two different household types. The focus groups were asked to estimate individual budget components as well as overall totals. As Project personnel noted, "Directly accessing the budgeting expertise of low-income householders anchors the analysis of poverty in the experience and knowledge of those who have to live on low incomes on a daily basis." The budgets from the different focus groups were generally fairly close to each other; where significant differences occurred, they could usually be traced to individual components (e.g., housing). On the basis of the focus group budgets, the researchers set a national poverty line for 1993 at 60 percent of median equivalent disposable household income.<sup>81</sup> Middleton notes that while this New Zealand method is similar to the CRSP method, the two differ in that the New Zealand method includes only low-income families in its focus groups, while the CRSP method includes persons from a wide range of socioeconomic levels.<sup>82</sup>

A broadly similar approach was used by the Social Planning Council of Winnipeg (Canada) and Winnipeg Harvest (an emergency food assistance program) to develop their Acceptable Living Level budget; they issued the 2000 update of this budget in March 2001. Both this update and the original 1997 budget were developed with the input of participants (also known as consultants) from Winnipeg's low-income population who "gave their insight, expertise, and unique perspective in developing the nature and extent of commodities included in the market basket of goods and services." For the 2000 revision, ten participants (one of whom had participated in the development of the original 1997 budget) met six times over a four-month period "to discuss the appropriate components and quantities of the proposed market basket of goods and services. Winnipeg Harvest and the Social Planning Council helped facilitate the discussions and record proceedings." The budget was intended to represent "a fair, modest and acceptable living level"--"a standard we believe should be within everyone's reach in a country as wealthy as Canada."<sup>83</sup> Much like the New Zealand budgets, this Winnipeg budget was based on input from only low-income persons, in contrast to the CRSP budgets, which were developed by groups including persons from a wide range of socioeconomic levels.

## Conclusion

The preceding material shows that British, European, and Australian social scientists have found a number of interesting and innovative ways to address the public policy issue of income inadequacy--"How much does it cost a family to live?" Some of the approaches discussed are (in Jonathan Bradshaw's phrase) "big social science," so it may not be possible to use them immediately to provide specific answers to the questions of American policy practitioners and members of the public who are struggling with this issue on a smaller scale. However, some of the other approaches or some of the other reports and articles mentioned may provide helpful suggestions for practitioners or members of the public dealing with this issue. Moreover, if American policy researchers decide over time to replicate or adapt some of these approaches, their results may also be helpful to other Americans trying to address this issue.

**Some Conceptual Definitions of Poverty  
from Britain, the European Community, and the United Nations**

Britain--Peter Townsend

In his landmark 1979 study, *Poverty in the United Kingdom*, Peter Townsend gave a conceptual definition of poverty in the first chapter. In one of the concluding chapters, he included a summarized version of this definition. The definition (including the summarized version) read as follows:

Poverty can be defined objectively and applied consistently only in terms of the concept of relative deprivation....The term is understood objectively rather than subjectively. Individuals, families and groups in the population can be said to be in poverty when they lack the resources to obtain the types of diet, participate in the activities and have the living conditions and amenities which are customary, or are at least widely encouraged or approved, in the societies to which they belong. Their resources are so seriously below those commanded by the average individual or family that they are, in effect, excluded from ordinary living patterns, customs and activities....I have suggested that an alternative, and more objective, conception [of poverty] might be founded on 'relative deprivation' -- by which I mean the absence or inadequacy of those diets, amenities, standards, services and activities which are common or customary in society. People are deprived of the conditions of life which ordinarily define membership of society. If they lack or are denied resources to obtain access to these conditions of life and so fulfil membership of society, they are in poverty.<sup>84</sup>

In his 1993 book, *The International Analysis of Poverty*, Townsend restated his conceptual definition of poverty as follows:

People are relatively deprived if they cannot obtain, at all or sufficiently, the conditions of life - that is, the diets, amenities, standards and services - which allow them to play the roles, participate in the relationships and follow the customary behaviour which is expected of them by virtue of their membership of society. If they lack or are denied resources to obtain access to these conditions of life and so fulfil membership of society they may be said to be in poverty.<sup>85</sup>

Britain--Mack and Lansley

In their 1985 book about the first Breadline Britain survey, Mack and Lansley gave the following conceptual definition of poverty:

*This study defines 'poverty' in terms of an enforced lack of socially perceived necessities [emphasis in original].<sup>86</sup>*

The European Community<sup>87</sup>

In 1975, the Council of Europe adopted the following conceptual definition of poverty:

Persons beset by poverty: individuals or families whose resources are so small as to exclude them from the minimum acceptable way of life of the Member State in which they live.<sup>88</sup>

The Council also adopted the following definition of resources:

Resources: goods, cash income, plus services from public and private sources.<sup>89</sup>

In December 1984, a Council Decision modified this conceptual definition of poverty as follows:

the poor shall be taken to mean persons, families and groups of persons whose resources (material, cultural and social) are so limited as to exclude them from the minimum acceptable way of life in the Member State in which they live.<sup>90</sup>

However, instead of trying to determine empirically the income/resource levels below which families became unable to participate in the minimum acceptable way of life in their country, the European Community adopted a relative (half of mean adjusted income/expenditure) definition of poverty as its operational definition of poverty.<sup>91</sup>

United Nations Definitions of "Absolute Poverty" and "Overall Poverty"

In 1995, the United Nations' World Summit for Social Development adopted a Declaration and Programme of Action which included definitions of "absolute poverty" and "overall poverty." "Absolute poverty" was defined as follows:

Absolute poverty is a condition characterised by severe deprivation of basic human needs, including food, safe drinking water, sanitation facilities, health, shelter, education and information. It depends not only on income but also on access to social services.<sup>92</sup>

The forms which "overall poverty" can take were given as follows:

...lack of income and productive resources to ensure sustainable livelihoods; hunger and malnutrition; ill health; limited or lack of access to education and other basic services; increased morbidity and mortality from illness; homelessness and inadequate housing; unsafe environments; and social discrimination and exclusion. It is also characterised by lack of participation in decision-making and in civil, social and cultural life. It occurs in all countries: as mass poverty in many developing countries, pockets of poverty amid wealth in developed countries, loss of livelihoods as a result of economic recession, sudden poverty as a result of disaster or conflict, the poverty of low-wage workers, and the utter destitution of people who fall outside family support systems, social institutions and safety nets.<sup>93</sup>

The "absolute poverty" and "overall poverty" concepts have been adapted for use in Britain using the "subjective" poverty line approach.<sup>94</sup> Work is also going on to adapt these concepts for use in Britain using the "consensual deprivation indicator" approach.<sup>95</sup>



**Social Deprivation in Britain vs. Material Hardship in the U.S.**

As suggested on p. 4 above, both Europeans and Americans have sometimes confused the "consensual deprivation indicator" methodology of measuring poverty and the study of material hardship indicators (as exemplified by the work of Mayer and Jencks<sup>96</sup>) with each other. However, despite some superficial similarities, there are major differences between these two enterprises; they are not simply variants of "the same thing." Here I will note two major differences.

Mack and Lansley were engaged in an effort to measure poverty on the basis of the views of society as a whole, rather than the views of experts.<sup>97</sup> Accordingly, as described above, they determined their final list of necessities by submitting a preliminary list of items to a national sample representative of the public, and including in their final list only those items identified by at least half of survey respondents as being a necessity. Mayer and Jencks, by contrast, used a list of material hardship indicators that they selected themselves, rather than asking a nationally representative sample to vote on them. (The question here is not whether one approach is better than the other; instead, the point is that the two approaches are different in this respect.)

Secondly, Mack and Lansley did not confine themselves to one segment of human needs. They viewed potential human needs "not only in terms of personal 'consumption' but also...in terms of social activities" [emphasis in original]. In their instructions to MORI for designing the Breadline Britain survey, they noted that the socially acceptable minimum standard of living that they wanted to explore "may cover not only the basic essentials for survival (such as food) but also access, or otherwise, to participating in society and being able to play a social role."<sup>98</sup> Mayer and Jencks, by contrast, focused only on material hardships. Even the possible indicators that they rejected were material consumption items (e.g., new clothes, an automobile), not social activities.<sup>99</sup>

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## ENDNOTES

<sup>1</sup>For the latest poverty guidelines, see "Annual Update of the HHS Poverty Guidelines," *Federal Register*, Vol. 66, No. 33, February 16, 2001, pp. 10695-10697; or visit the Poverty Guidelines, Research, and Measurement Web site at <<http://aspe.hhs.gov/poverty/poverty.htm>>. For further information on the guidelines and my work with them, see Gordon M. Fisher, "Disseminating the Administrative Version and Explaining the Administrative and Statistical Versions of the Federal Poverty Measure," *Clinical Sociology Review*, Vol. 15, 1997, pp. 163-182.

<sup>2</sup>Veit-Wilson discusses the first three of these approaches in John Veit-Wilson, *Setting adequacy standards: How governments define minimum incomes*, Bristol, United Kingdom, The Policy Press, 1998, pp. 14-20; he briefly reviews all four of them in John Veit-Wilson, "Preface," pp. xiii-xiv in Hermione Parker (editor), *Low Cost but Acceptable: A minimum income standard for the UK: Families with young children: January 1998 prices*, Bristol, United Kingdom, The Policy Press and the Zacchaeus 2000 Trust, 1998.

<sup>3</sup>To help explain the difficulties and frustrations that poverty researchers and policy practitioners from different countries and backgrounds often experience in trying to communicate with each other about poverty, Veit-Wilson employs the concept of "discourses of poverty." A discourse of poverty is a package of assumptions--often unspoken or taken for granted--about the nature of poverty, the nature of the people whose poverty is being discussed, and the nature of the knowledge that is relevant to dealing with poverty. A discourse may assume certain prescriptions for action, and may exclude others. Veit-Wilson found that the economic and behavioral discourses are dominant in the U.S., while the structural discourse is dominant among the British social scientists whose work he discusses. See Veit-Wilson, *Setting adequacy standards*, pp. 41-48 and 92-100; and John Veit-Wilson, "Horses for discourses: poverty, purpose and closure in minimum income standards policy," pp. 141-164 in David Gordon and Peter Townsend (editors), *Breadline Europe: The measurement of poverty*, Bristol, United Kingdom, The Policy Press, 2000.

<sup>4</sup>Peter Townsend, *Poverty in the United Kingdom: A Survey of Household Resources and Standards of Living*, Berkeley, University of California Press, 1979, p. 31; see also the summarized version of this definition on p. 915. For earlier versions of this definition, see Peter Townsend, "The Meaning of Poverty," *British Journal of Sociology*, Vol. 13, No. 3, September 1962, p. 225; and Peter Townsend, "Measures and Explanations of Poverty in High Income and Low Income Countries: The Problems of Operationalizing the Concepts of Development, Class and Poverty," p. 19 in Peter Townsend (editor), *The Concept of Poverty*:

*Working Papers on Methods of Investigation and Life-Styles of the Poor in Different Countries*, New York, American Elsevier Publishing Company, Inc., 1970. For a more recent restatement of this definition, see Peter Townsend, *The International Analysis of Poverty*, London, Harvester Wheatsheaf, 1993, p. 36. (For the full 1979 version (including the summary) and the 1993 version of this definition, see *Appendix A* in the United Kingdom, p. 915.

<sup>6</sup>Veit-Wilson, *Setting adequacy standards*, pp. 14-15; Peter Townsend, "The poverty line: methodology and international comparisons," pp. 49-69 in David Gordon and Christina Pantazis (editors), *Breadline Britain in the 1990s*, Aldershot, England, Ashgate, 1997; David Gordon and Christina Pantazis, "Measuring poverty: Breadline Britain in the 1990s," pp. 5-47 (see especially pp. 11-26 and 29-35) in Gordon and Pantazis, *Breadline Britain in the 1990s*; and David Gordon, "The Scientific Measurement of Poverty: Recent Theoretical Advances," pp. 37-58 in Jonathan Bradshaw and Roy Sainsbury (editors), *Researching Poverty*, Aldershot, England, Ashgate, 2000.

<sup>7</sup>This approach has been referred to as the "deprivation indicator approach" (Veit-Wilson, *Setting adequacy standards*, pp. 16-17), the "consensual approach" ("Consensual poverty," pp. 30-31 in David Gordon and Paul Spicker (editors), *The International Glossary on Poverty*, London, Zed Books, 1999), and the "social indicators" method (Veit-Wilson, "Preface," p. xiii).

<sup>8</sup>Joanna Mack and Stewart Lansley, *Poor Britain*, London, George Allen & Unwin Ltd., 1985 (see particularly pp. xix-xxi and 9-11). See also Susanne MacGregor, "[review of] J. Mack and S. Lansley, *Poor Britain...*", *Journal of Social Policy*, Vol. 14, Part 4, October 1985, pp. 575-578; she called "the whole enterprise" (the television series, a booklet, and the book) "a fine model for social investigation in the eighties" (p. 575).

<sup>9</sup>Gordon and Pantazis, *Breadline Britain in the 1990s* (see particularly pp. xix-xxiii, 1, and 235); the editors commented, "It is to the credit of London Weekend Television (LWT) and the Joseph Rowntree Foundation that they have funded the kind of detailed study of deprivation in Britain that the government and the academic research councils have not been prepared to finance" (p. 1). See also Harold Frayman, *Breadline Britain - 1990s: The Findings of the Television Series*, London, Domino Films and London Weekend Television, 1991.

<sup>10</sup>David Gordon, Laura Adelman, Karl Ashworth, Jonathan Bradshaw, Ruth Levitas, Sue Middleton, Christina Pantazis, Demi Patsios, Sarah Payne, Peter Townsend, and Julie Williams, *Poverty and social exclusion in Britain*, York, Joseph Rowntree Foundation, 2000 (see particularly pp. 4, 7, and 85).

<sup>11</sup>Mack and Lansley, pp. 9 and 31-44; MacGregor, pp. 576-577; and Gordon et al., *Poverty and social exclusion in Britain*, p. 72. For Townsend's relative deprivation poverty measurement methodology, see Townsend, *Poverty in the United Kingdom*, pp. 248-262. Townsend's study was funded by the Joseph Rowntree Memorial Trust and Lansley [the Joseph Rowntree Foundation (1990)].  
<sup>12</sup>Mack and Lansley, pp. 9 and 31-44. For other conceptual definitions of poverty, see Appendix A.

<sup>13</sup>Mack and Lansley, pp. 10 and 287-288; Gordon and Pantazis, *Breadline Britain in the 1990s*, pp. 1, 3, and 269; and Gordon et al., *Poverty and social exclusion in Britain*, pp. 7, 12-13, and 85-91. (The 1999 Poverty and Social Exclusion Survey used two different nationally representative samples, one to identify socially perceived necessities, and the other to establish how many people lacked which necessities and whether those lacks were because the people did not want the necessities or because they could not afford the necessities.)

<sup>14</sup>Mack and Lansley, pp. 9, 42, 44, 49-55, 86, and 294. (The quotations are from pp. 44, 54-55, and 52.) See also Gordon and Pantazis, *Breadline Britain in the 1990s*, pp. xx, 3-4, and 72; and Gordon et al., *Poverty and social exclusion in Britain*, pp. 10-14, 32, and 85.

<sup>15</sup>Frayman, p. 2.

<sup>16</sup>Mack and Lansley, p. 57 (the source of the quotation); Gordon and Pantazis, *Breadline Britain in the 1990s*, p. 4; and Gordon et al., *Poverty and social exclusion in Britain*, pp. 13-14 and 77. Several minor exceptions were made to this rule: In the 1983 Breadline Britain survey, four items identified as necessities by more than 50 percent of the population were not included in the final list of necessities because inability to afford them (see below) did not show a statistically significant correlation with income (Mack and Lansley, pp. 100-103). In the 1999 Poverty and Social Exclusion Survey, six items identified as necessities by more than 50 percent of the population were dropped from the final list of necessities because statistical analysis showed that they did not add to the reliability or validity of the overall deprivation index (Gordon et al., *Poverty and social exclusion in Britain*, pp. 18 and 77-78).

<sup>17</sup>In theoretical debates that arose after the publication of Mack and Lansley's book, one issue that came up was this decision to designate as necessities those items identified as such by 50 percent--rather than some other percent--of the population. To address this issue, Bjørn Hallerød of Sweden developed the Proportional Deprivation Index (PDI), a modified version of Mack and Lansley's approach. Instead of including only items from the preliminary list which more than 50 percent of the population identified as necessities, the PDI includes all items from the preliminary list, but gives each item a weight which is the

proportion of the population identifying it as a necessity. See Bjørn Hallerød, Jonathan Bradshaw, and Hilary Holmes, "Adapting the consensual definition of poverty," pp. 213-234 in Gordon and Pantazis, *Breadline Britain in the 1990s*, pp. 54-59; Mack and Lansley, *Breadline Britain in the 1990s*, pp. 4-6; Gordon and Pantazis, *Breadline Britain in the 1990s*, pp. 17-19; and Gordon et al., *Poverty and social exclusion in Britain*, pp. 13-16, 18, 32-34, and 80.

<sup>19</sup>Gordon and Pantazis, *Breadline Britain in the 1990s*, pp. 17-19 (the quotation is from p. 18); and Gordon et al., *Poverty and social exclusion in Britain*, pp. 77 and 81-82.

<sup>20</sup>Mack and Lansley, pp. 52-53, 105, 173, 178, and 297; Gordon and Pantazis, *Breadline Britain in the 1990s*, pp. xx and 4; and Gordon et al., *Poverty and social exclusion in Britain*, pp. 7, 10, 14, 17-18, 33-35, and 77.

<sup>21</sup>Mack and Lansley, pp. 169, 176, and 178. In an analysis of those lacking socially perceived necessities by choice (because they did not want them), Mack and Lansley found (p. 96) that while a significant minority of the "rich" [the top decile of respondents ranked by net equivalent household income] lacked one or even two necessities by choice, only 4 percent of them lacked three or more necessities [a number equal to Mack and Lansley's poverty line] by choice. "The rich do not choose the lifestyles associated with the lack of necessities."

<sup>22</sup>Gordon and Pantazis, *Breadline Britain in the 1990s*, p. 29; and Gordon et al., *Poverty and social exclusion in Britain*, pp. 10-11, 18, 33-35, 78-79, and 82-84. More precisely, the poverty line for adults in the 1999 survey was specified as "an enforced lack of two [or more] necessities and a low income" (p. 18); I was unable to find an unambiguous statement of what was meant by "a low income."

<sup>23</sup>Gordon et al., *Poverty and social exclusion in Britain*, p. 72.

<sup>24</sup>Tim Callan, Brian Nolan, and Christopher T. Whelan, "Resources, Deprivation and the Measurement of Poverty," *Journal of Social Policy*, Vol. 22, Part 2, April 1993, pp. 141-172; and Brian Nolan and Christopher T. Whelan, "Measuring Poverty Using Income and Deprivation Indicators: Alternative Approaches," *Journal of European Social Policy*, Vol. 6, No. 3, 1996, pp. 225-240.

<sup>25</sup>Richard Layte, Brian Nolan, and Christopher T. Whelan, "Targeting Poverty: Lessons from Monitoring Ireland's National Anti-Poverty Strategy," *Journal of Social Policy*, Vol. 29, Part 4, October 2000, pp. 553-575; and Richard Layte, Brian Nolan, and Christopher Whelan, "Poverty and affluence in Ireland: a comparison of income and deprivation approaches to the

measurement of poverty," pp. 203-222 in Gordon and Townsend, *Breadline Britain in the 1990s*, pp. 24 and 29. <sup>26</sup>See also Gordon and Townsend, "Are Married Women More Deprived Than Their Husbands?", *Journal of Social Policy*, Vol. 27, Part 2, April 1998, pp. 151-171. For some conceptual issues relating to this question, see Jane Millar and Caroline Glendinning, "Gender and Poverty," *Journal of Social Policy*, Vol. 18, Part 3, July 1989, pp. 363-381; and Stephen P. Jenkins, "Poverty Measurement and the Within-Household Distribution: Agenda for Action," *Journal of Social Policy*, Vol. 20, Part 4, October 1991, pp. 457-483.

<sup>27</sup>Mack and Lansley, pp. 101, 103, and 191-194; and Gordon and Pantazis, *Breadline Britain in the 1990s*, pp. 24 and 29.

<sup>28</sup>David P. Ross and Paul Roberts, *Income and Child Well-being: A new perspective on the poverty debate*, Ottawa, Canadian Council on Social Development, 1999 (available on the Internet at <<http://www.ccsd.ca/pubs/inckids/index.htm>>).

<sup>29</sup>Denton R. Vaughan, "Self-Assessments of Income Needs and Financial Circumstances: Two Decades of Seeking a Place in Federal Household Surveys," p. 104 in *American Statistical Association: 1996 Proceedings of the Government Statistics Section*.

<sup>30</sup>Jonathan Bradshaw (editor), *Budget Standards for the United Kingdom*, Aldershot, England, Avebury, 1993, p. 1.

<sup>31</sup>Gordon M. Fisher, "From Hunter to Orshansky: An Overview of (Unofficial) Poverty Lines in the United States from 1904 to 1965" (unpublished paper), October 1993--revised August 1997, pp. 1-2. (This paper is available on the Internet at <<http://www.census.gov/hhes/poverty/povmeas/papers/hstorsp4.html>> .)

<sup>32</sup>For examples of budgets judged (by persons other than their developers) to be below a socially acceptable minimum standard of living, see Margaret F. Byington, "Making Income Equal Outgo--What the Struggle Means to Cotton Mill Workers," *Survey*, Vol. 30, No. 3, April 19, 1913, p. 110 (commenting on an American standard budget); and Lars Osberg, "[review of]...*Poverty in Canada* by Christopher A. Sarlo...", *Canadian Public Policy/Analyse de Politiques*, Vol. 19, No. 2, June 1993, pp. 222-223.

<sup>33</sup>Harold W. Watts, "A Review of Alternative Budget-Based Expenditure Norms" (an unpublished paper prepared for the Panel on Poverty Measurement [sic] of the Committee on National Statistics, National Academy of Sciences/National Research Council), March 1993; and Constance F. Citro and Robert T. Michael (editors), *Measuring Poverty: A New Approach*, Washington, D.C., National Academy Press, 1995, pp. 107, 116, and



119. Watts also classified Orshansky's procedure for developing her poverty thresholds as a variant of the budget standards approach. However, I would have to disagree with him on that point. (See Gordon M. Fisher, "The Development of the Orshansky Poverty Thresholds and Their Subsequent History as the Official U.S. Poverty Measure" (unpublished paper), May 1992--partially revised September 1997, pp. 3 and 53 (note 13); this paper is available on the Internet at <http://www.census.gov/hhes/poverty/povmeas/papers/orshansky.html> >.) Although the Economy Food Plan that Orshansky used was a standard budget for food, her overall procedure was not a standard budget approach, since she did not use a list of specific goods and services (or even give a specific dollar amount) for any consumption category other than food. Instead, I have (in unpublished comments) termed her procedure a "component-and-multiplication approach." In this variant of the budget standards approach, note the frank comment by Jonathan Bradshaw: "...deriving budgets is nothing less than a ghastly chore. Drawing up inventories of highly specified items, giving numbers to them, allocating lifetimes, processing them and putting them into lists, incorporating them in the budget and adding them up, is a time-consuming, tedious and unexciting job....It is far more demanding than secondary data analysis and probably as demanding as survey research. It is big social science, it takes considerable effort, expertise, and imagination" (Bradshaw, *Budget Standards for the United Kingdom*, p. 236).

<sup>35</sup>Bradshaw, *Budget Standards for the United Kingdom*, pp. xiii-xiv, 1, 3-6, 172-174, 196-209, 214, and 236-238. (The extended quotations are from pp. 4 and 200; for "socially accepted standard," see p. 201. The author of Chapter 13, "The low cost budget" (pp. 196-215), was Autumn C.S. Yu.) See also Jonathan Bradshaw, "Rediscovering budget standards," pp. 60-76 in Jos Berghman and Bea Cantillon (editors), *The European Face of Social Security: Essays in honour of Herman Deleeck*, Aldershot, England, Avebury, 1993.

<sup>36</sup>Peter Saunders, Jenny Chalmers, Marilyn McHugh, Colette Murray, Michael Bittman, and Bruce Bradbury, assisted by Roisin Thanki, Denise Thompson, and Sally Doran, *Development of Indicative Budget Standards for Australia*, Policy Research Paper No. 74 (Consultant's Report for a Project commissioned by the [Australian] Department of Social Security), Budget Standards Unit, Social Policy Research Centre, University of New South Wales, March 1998, pp. 54-57, 61, 63, 66, 68-69, and 80; and Peter Saunders, "Budget Standards and the Poverty Line," *Australian Economic Review*, Vol. 32, No. 1, March 1999, pp. 43-61. (The quotations are from pp. 63 (first three quotations), 56, 68, and 69 of the Saunders et al. report, and p. 52 of the Saunders article.)

<sup>37</sup>Harold W. Watts, "Special panel suggests changes in BLS Family Budget Program," *Monthly Labor Review*, Vol. 103, No. 12, December 1980, pp. 7-9; and Robert Walker, "Consensual Approaches to the Definition of Poverty: Towards an Alternative Methodology," *Journal of Social Policy*, Vol. 16, Part 2, April 1987, pp. 1-22; Fisher, "From Hunter to Orshansky..." (1997 revision), pp. 6, 8-9, 10-12, 15-17, 20-24, 28-29, and 33.

<sup>39</sup>Mark K. Sherwood, "Bureau of Labor Statistics (BLS) Family Budgets Program," Technical Paper IV of *The Measure of Poverty*, Washington, D.C., U.S. Department of Health, Education, and Welfare, 1977; and Citro and Michael, pp. 120-122.

<sup>40</sup>See, for instance, Mollie Orshansky, "Counting the Poor: Another Look at the Poverty Profile," *Social Security Bulletin*, Vol. 28, No. 1, January 1965, p. 5; U.S. Department of Health, Education, and Welfare, *The Measure of Poverty: A Report to Congress as Mandated by The Education Amendments of 1974*, Washington, D.C., U.S. Government Printing Office, April 1976, pp. xxiii, xxiv, 40, 44, and 73; Watts, "Special panel suggests changes...", p. 8; and TARP Institute, *The Market Basket Approach for Deriving Poverty Thresholds: A Feasibility Study* (by John Goodman and Marc Grainer; research supported by Grant No. 30161, Community Services Administration), Washington, D.C., August 1981, pp. ES-4, 22-26, and 73.

<sup>41</sup>John E. Schwarz and Thomas J. Volgy, *The Forgotten Americans*, New York, W.W. Norton & Company, 1992, pp. 42-52; and Trudi J. Renwick and Barbara R. Bergmann, "A Budget-Based Definition of Poverty, With an Application to Single-Parent Families," *Journal of Human Resources*, Vol. 28, No. 1, Winter 1993, pp. 1-24.

<sup>42</sup>See, for instance, Bruce Steuernagel and Kevin Ristau, *The Cost of Living in Minnesota*, St. Paul, Minnesota, JOBS NOW Coalition, October 1998; Ellen Kahler and Doug Hoffer, *The Vermont Job Gap Study, Phase 5: Basic Needs and a Livable Wage, 1998 Update*, Burlington, Vermont, Peace & Justice Center, August 1999 (available on the Internet at <<http://www.vtlivablewage.org/JOBGAP5a.pdf>>); and Diana Pearce and Jennifer Brooks, *The Self-Sufficiency Standard for the Washington, DC Metropolitan Area*, Wider Opportunities for Women, Fall 1999 (available on the Internet at <<http://www.sixstrategies.org/files/Resource-StandardReport-DC.pdf>>). (For further information on the self-sufficiency standards calculated by Pearce, Brooks, and their colleagues for various states and localities, see Jennifer Brooks and Diana Pearce, "Meeting Needs, Measuring Outcomes: The Self-Sufficiency Standard as a Tool for Policy-Making, Evaluation, and Client Counseling," *Clearinghouse Review*, Vol. 34, No. 1-2, May-June 2000, pp. 34-49.) For a detailed discussion of procedures and criteria for constructing basic needs budgets, as well as a

review of nineteen individual budgets, see Jared Bernstein, Chauna Brocht, and Maggie Spade-Aguilar, *How Much Is Enough? Basic Family Budgets for Working Families*, Washington, D.C., Economic Policy Institute, 2000 (available on the Internet at <http://www.epi.org/workingbooks/newmichisastudyfinal.pdf>); see also B.S. Rowntree, *See by the Rowntree Books & Newmichisastudyfinal.pdf*, London, Macmillan and Co., Ltd., 1901, pp. 86-111; see also pp. 132-134. For the relationship between Rowntree's primary poverty line and his overall procedure for identifying the poor, see J[ohn] H. Veit-Wilson, "Paradigms of Poverty: A Rehabilitation of B.S. Rowntree," *Journal of Social Policy*, Vol. 15, Part 1, January 1986, pp. 69-99.

<sup>44</sup>Peter Townsend [unattributed], "Poverty: Ten Years After Beveridge," *Planning* (published by Political and Economic Planning), Vol. 19, No. 344, August 4, 1952, pp. 21-40; and John H. Veit-Wilson, "Muddle or Mendacity? The Beveridge Committee and the Poverty Line," *Journal of Social Policy*, Vol. 21, Part 3, July 1992, pp. 269-301.

<sup>45</sup>Bradshaw, *Budget Standards for the United Kingdom*, pp. 1-2.

<sup>46</sup>Note that another budget standard was also published in 1993; see Sean Stitt and Diane Grant, *Poverty: Rowntree Revisited*, Aldershot, England, Avebury, 1993.

<sup>47</sup>Hermione Parker (editor), *Low Cost but Acceptable: A minimum income standard for the UK: Families with young children: January 1998 prices*, Bristol, United Kingdom, The Policy Press and the Zacchaeus 2000 Trust, 1998; and Hermione Parker (editor), *Low Cost but Acceptable incomes for older people: A minimum income standard for households aged 65-74 years in the UK*, Bristol, United Kingdom, The Policy Press, 2000. As of the present writing, I have not seen copies of these books (except for the preface of the first), so I cannot cite the definition that they give for "low cost but acceptable."

<sup>48</sup>Saunders et al., *Development of Indicative Budget Standards for Australia*, p. 28.

<sup>49</sup>A[llan] Halladay, "The Extent of Poverty Among Large Families in the Heart of Sydney," *Economic Record*, Vol. 48, No. 124, December 1972, pp. 483-499.

<sup>50</sup>Gordon M. Fisher, "Is There Such a Thing as an Absolute Poverty Line Over Time? Evidence from the United States, Britain, Canada, and Australia on the Income Elasticity of the Poverty Line" (unpublished paper), August 1995, pp. 51-56. (This paper is available on the Internet at <http://www.census.gov/hhes/poverty/povmeas/papers/elastap4.html> .)

<sup>51</sup>Michael C. Wolfson and John M. Evans, *Statistics Canada's Low Income Cut-Offs: Methodological Concerns and Possibilities--A Discussion Paper* [December 1989], Statistics Canada, Analytical Studies Branch, Research Paper Series, p. 39; and David P. Ross, Katherine Scott, and Peter Smith, *The Canadian Fact Book on Poverty 2000*, Ottawa, Canadian Council on Social Development, 2000, pp. 20, 57-58, 64, and 77. Veit-Wilson's study of how the governments of ten countries set Minimum Income Standards was funded by the Nuffield Foundation and the Joseph Rowntree Foundation. For his useful distinctions among poverty lines, governmental Minimum Income Standards, and social assistance benefit levels, see pp. 7-9 and 24-29.

<sup>53</sup>Anthony B. Atkinson and John Micklewright, *Economic transformation in Eastern Europe and the distribution of income*, Cambridge, Great Britain, Cambridge University Press, 1992, pp. 191-195. (Non-standard-budget minimum income measures have also been calculated in some of these countries.)

<sup>54</sup>Saunders et al., *Development of Indicative Budget Standards for Australia*, pp. 33-34.

<sup>55</sup>One probable reason for this is that some Dutch economists who helped develop this approach have published articles about it--sometimes co-authored with American economists--in American journals. (See, for instance, the Goedhart et al. article cited below in endnote 57; Diane Colasanto, Arie Kapteyn, and Jacques van der Gaag, "Two Subjective Definitions of Poverty: Results from the Wisconsin Basic Needs Study," *Journal of Human Resources*, Vol. 19, No. 1, winter 1984, pp. 127-138; and Sheldon Danziger, Jacques van der Gaag, Michael Taussig, and Eugene Smolensky, "The Direct Measurement of Welfare Levels: How Much Does It Cost to Make Ends Meet?", *Review of Economics and Statistics*, Vol. 66, No. 3, August 1984, pp. 500-505.) To my knowledge, the British sociologists and social policy specialists who developed the two "consensual" approaches have not co-authored articles with American economists about those approaches that have been published in American journals.

<sup>56</sup>The standard budget/budget standards approach seems to have originated independently in the American labor advocacy/reformist social work tradition and in the (19th-century) British social policy tradition, which exercised mutual influences on each other.

<sup>57</sup>Theo Goedhart, Victor Halberstadt, Arie Kapteyn, and Bernard van Praag, "The Poverty Line: Concept and Measurement," *Journal of Human Resources*, Vol. 12, No. 4, Fall 1977, pp. 503-520 (see especially pp. 510-515; for the question wording, see p. 510); Arie Kapteyn, Sara van de Geer, and Huib van de Stadt, "The Impact of Changes in Income and Family Composition on Subjective

Measures of Well-Being," pp. 35-64 (see especially pp. 37-39, 45-46, and 50-51) in Martin David and Timothy Smeeding (editors), *Horizontal Equity, Uncertainty, and Economic Well-Being* (Studies in Income and Wealth, Volume 50), Chicago, University of Chicago Press, 1985; and Karel Van den Bosch, "Poverty measures in comparative research," "The Adequacy of the Social Security System in Belgium, 1976-1985," *Journal of Social Policy*, Vol. 18, Part 1, January 1989, pp. 91-117; and Van den Bosch, pp. 12-13.

<sup>59</sup>Veit-Wilson, *Setting adequacy standards*, pp. 54-55.

<sup>60</sup>Goedhart, Halberstadt, Kapteyn, and van Praag (see especially pp. 506-510 and 516-517); Kapteyn, van de Geer, and van de Stadt (see especially pp. 39-45 and 51-52); and Van den Bosch, p. 12.

<sup>61</sup>Peter Townsend and David Gordon, "What is enough? New evidence on poverty allowing the definition of a minimum benefit," pp. 45-51, 62-63, and 66-69 in Michael Adler, Colin Bell, Jochen Clasen, and Adrian Sinfield (editors), *The Sociology of Social Security*, Edinburgh, Edinburgh University Press, 1991; Peter Townsend with Paul Corrigan and Ute Kowarzik, *Poverty & Labour in London--Interim Report of a Centenary Survey* (Survey of Londoners' Living Standards No. 1), London, Low Pay Unit, June 1987, pp. 1 and 54; Peter Townsend, David Gordon, Jonathan Bradshaw and Brian Gosschalk, *Absolute and Overall Poverty in Britain in 1997: What the Population Themselves Say: Bristol Poverty Line Survey--Report of the Second MORI Survey*, Bristol Statistical Monitoring Unit, School for Policy Studies, University of Bristol, Bristol, United Kingdom, November 1997, pp. 5-10 and 12-21; Gordon et al., *Poverty and social exclusion in Britain*, pp. 9, 11, 30-31, 69, and 73; and David Gordon, "Measuring absolute and overall poverty," pp. 49-77 in Gordon and Townsend, *Breadline Europe: The measurement of poverty*. (The quotations are from pp. 76, 59, and 60 of the Gordon chapter.) For the United Nations definitions of "absolute poverty" and "overall poverty," see Appendix A. For a comparison of "subjective" poverty lines calculated by applying the "population average method" and the SPL method to the 1999 survey data, see pp. 61-62 of the Gordon chapter.

<sup>62</sup>Bernard M.S. van Praag, Aldi J.M. Hagenaars, and Hans van Weeren, "Poverty in Europe," *Review of Income and Wealth*, Series 28, No. 3, September 1982, pp. 345-359.

<sup>63</sup>Karel Van den Bosch, Tim Callan, Jordi Estivill, Pierre Hausman, Bruno Jeandidier, Ruud Muffels, and John Yfantopoulos, "A comparison of poverty in seven European countries and regions using subjective and relative measures," *Journal of Population Economics*, Vol. 6, No. 3, August 1993, pp. 235-259.

<sup>64</sup>Peter Saunders, Björn Halleröd, and George Matheson, "Making Ends Meet in Australia and Sweden: A Comparative Analysis Using the Subjective Poverty Line Methodology," *Acta Sociologica*, Vol. 33, No. 3, 1990, pp. 219-221. <sup>65</sup>Colasanto, van der Gaag, and Danziger, "An Evaluation of Subjective Poverty Definitions: Comparing Results from the U.S. and the Netherlands," *Review of Income and Wealth*, Series 37, No. 3, September 1991, pp. 267-285.

<sup>66</sup>René Morissette and Susan Poulin, *Income Satisfaction Supplement: Summary of Four Survey Years* (Staff Report), Statistics Canada, Labour and Household Surveys Analysis Division, October 1991.

<sup>67</sup>Colasanto, Kapteyn, and van der Gaag; and Danziger, van der Gaag, Taussig, and Smolensky.

<sup>68</sup>Note that Goedhart et al.--the 1977 article that introduced the SPL methodology (including the MIQ) to speakers of English--quoted the American version of this Gallup Poll question (p. 506).

<sup>69</sup>Fisher, "Is There Such a Thing as an Absolute Poverty Line Over Time?...", pp. 12-16, 61-62, and 67-68. For the published version of the unpublished 1989 Australian paper that I cited on p. 67, see Peter Saunders and Bruce Bradbury, "Some Australian Evidence on the Consensual Approach to Poverty Measurement," *Economic Analysis & Policy*, Vol. 21, No. 1, March 1991, pp. 47-78.

<sup>70</sup>Note that the descriptive phrase in the Australian poll question--"to keep in health and live decently"--differs from the descriptive phrase in the U.S. and Canadian poll questions--"to get along." However, four times during the 1937-1944 period, the U.S. Gallup Poll had asked similar questions in which the operational phrases were "for health and comfort," "health and decency," or "comfort and decency." A comparison of dates discloses that the Australian question, with its wording reminiscent of the 1937-1944 U.S. questions, was first asked in February 1945, while the "get along" wording was not used in the U.S. until January 1946.

<sup>71</sup>Halladay, pp. 487-488.

<sup>72</sup>Peter Saunders and Bruce Bradbury, "Some Australian Evidence on the Consensual Approach to Poverty Measurement" (Social Welfare Research Centre Discussion Paper No. 14), Kensington, New South Wales, Australia, Social Welfare Research Centre, University of New South Wales, July 1989, pp. 2-3, 19-28, and 32-37. (The quotation is from p. 9.) For the published version of this paper, see endnote 69. (Note that some British and Australian researchers refer to the "subjective" poverty line approach as the "consensual" approach. This is part of the

terminological fluidity--if not confusion--alluded to above on p. 3 and <sup>73</sup>William DeHare, Taynia Mann, Kathryn Porter, and Robert Greenstein, *Real Life Poverty in America: Where the American Public Would Set the Poverty Line* (A Center on Budget and Policy Priorities and Families USA Foundation Report), July 1990, pp. iii, 4, and 18-19. (The quotations are from p. 18.) See also Citro and Michael, pp. 137-140.

<sup>74</sup>Denton R. Vaughan, "Exploring the Use of the Public's Views to Set Income Poverty Thresholds and Adjust Them Over Time," *Social Security Bulletin*, Vol. 56, No. 2, Summer 1993, pp. 22-46.

<sup>75</sup>David P. Ross, Executive Director, Canadian Council on Social Development, "Letter to the Editor of the Ottawa Citizen," December 23, 1998 (available on the Internet at <<http://www.ccsd.ca/98/edcit98.htm>>); and Ross, Scott, and Smith, pp. 30-31.

<sup>76</sup>Dominion Bureau of Statistics, Consumer Finance Research Staff, *Statistics on Low Income in Canada, 1967*, Ottawa, Information Canada, June 1971, p. 7; Roger Love and Gail Oja, "Low Income in Canada," *Review of Income and Wealth*, Series 23, No. 1, March 1977, pp. 40 and 43; Wolfson and Evans, p. 1; and Ivan P. Fellegi, Chief Statistician of Canada, "On Poverty and Low Income," <<http://www.statcan.ca/Daily/English/pauv.htm>> [posted October 2, 1997].

<sup>77</sup>Robert Walker, "Consensual Approaches to the Definition of Poverty: Towards an Alternative Methodology," *Journal of Social Policy*, Vol. 16, Part 2, April 1987, pp. 213-226. (The quotations are from pp. 213-214, 221, 214, and 222.)

<sup>78</sup>Jersey is one of the Channel Islands, located in the English Channel between England and France. The Channel Islands are the only part of the ancient Duchy of Normandy still under the rule of the British Crown. Administratively, they are divided into the Bailiwick of Jersey and the Bailiwick of Guernsey. The two bailiwicks are British Crown dependencies, but not part of the United Kingdom. Each is governed under its own laws and customs, with a lieutenant governor appointed by the Crown. The legislative assembly of Jersey is called the States of Jersey.

<sup>79</sup>Sue Middleton and Michelle Thomas, "The 'bare essentials': parents' minimum budget for children," pp. 9-22 in Sue Middleton, Karl Ashworth, and Robert Walker, *Family Fortunes: Pressures on parents and children in the 1990s* (Poverty Publication 89), London, CPAG [Child Poverty Action Group] Ltd., 1994 (see also Appendix, "Methods used in the study," pp. 152-154); Sue Middleton, "Agreeing Poverty Lines: The Development of Consensual Budget Standards Methodology," pp. 59-76 in Bradshaw

and Sainsbury, *Researching Poverty*; and "Poverty Lines for Households in Jersey," *Briefings* [newsletter of the Centre for Research in Social Policy], Issue 14, Autumn 1999, p. 7 (available on the Internet at <[http://www.lboro.ac.uk/departments/ss/centres/crsp/Briefings14\\_.pdf](http://www.lboro.ac.uk/departments/ss/centres/crsp/Briefings14_.pdf)>). (The quotations are from Middleton, p. 63 (first two quotations); Middleton and Thomas, p. 20; Middleton, p. 75; and Middleton and Thomas, "The minimum budgetary requirements of households in Jersey - questions and answers," in [minutes of the meeting of the States of Jersey on 14th September 1999], <<http://www.statesassembly.gov.je/documents/minutes/14859-28555.htm>>.

<sup>81</sup>Charles Waldegrave and Paul Frater, "New Zealand: A Search for a National Poverty Line," pp. 160-186 in Else Øyen, S.M. Miller, and Syed Abdus Samad (editors), *Poverty: A Global Review: Handbook on International Poverty Research*, Oslo, Scandinavian University Press, 1996; Charles Waldegrave, Shane Stuart, and Robert Stephens, "Participation in Poverty Research: Drawing on the Knowledge of Low-Income Householders to Establish an Appropriate Measure for Monitoring Social Policy Impacts," *Social Policy Journal of New Zealand*, Issue 7, December 1996, pp. 191-206; and Robert Stephens, "The Social Impact of Reform: Poverty in Aotearoa/New Zealand," *Social Policy & Administration*, Vol. 34, No. 1, March 2000, pp. 64-86. (The quotation is from Waldegrave, Stuart, and Stephens, p. 203.)

<sup>82</sup>Middleton, p. 62.

<sup>83</sup>Social Planning Council of Winnipeg and Winnipeg Harvest, *Acceptable Living Level (ALL) 2000 - Updated & Revised*, March 2001 (available on the Internet at <[http://www.spcw.mb.ca/reference/doc\\_all2000.pdf](http://www.spcw.mb.ca/reference/doc_all2000.pdf)>). (The quotations are from pp. 2, 3, 1, and 27.)

<sup>84</sup>Townsend, *Poverty in the United Kingdom*, pp. 31 and 915. A version of the first chapter of this book had been published in a 1974 edited book. For Townsend's definition as it appeared in the 1974 book, see Peter Townsend, "Poverty as relative deprivation: resources and style of living," p. 15 in Dorothy Wedderburn (editor), *Poverty, inequality and class structure*, London, Cambridge University Press, 1974.

<sup>85</sup>Townsend, *The International Analysis of Poverty*, p. 36. (Note that this restatement seems to have drawn largely on the summarized version of the definition in the concluding chapter of the 1979 book.)

<sup>86</sup>Mack and Lansley, p. 39.

<sup>87</sup>Since 1993, the European Community is known as the European Union.



<sup>88</sup>Commission of the European Communities, *Final report from the Commission to the Council on the first programme of pilot schemes and studies to combat poverty*, Brussels, December 1981, p. 8, quoted in Mack and Lansley, p. 41, and in J.D. Roche, "Methodological and data problems in inter-country comparisons of poverty in the European Community: an examination of possible approaches to solutions," pp. 158 and 161 (note 5) in Giovanni Sarpellon (editor), *Understanding Poverty*, Milano, Italy, Franco Angeli, 1984.

<sup>89</sup>Commission of the European Communities, p. 8, quoted in Roche, pp. 158 and 161 (note 5).

<sup>90</sup>"On Specific Community Action to Combat Poverty" (Council Decision of 19 December 1984), 85/8/EEC, *Official Journal of the EEC* [European Economic Community], No. 2/24, quoted in Commission of the European Communities, *Poverty in figures: Europe in the early 1980s*, Luxembourg, Office for Official Publications of the European Communities, 1990, p. 5, and in "European Union definition of poverty," p. 54 in Gordon and Spicker.

<sup>91</sup>Townsend, "The poverty line: methodology and international comparisons," pp. 54-55.

<sup>92</sup>United Nations, *The Copenhagen Declaration and Programme of Action: World Summit for Social Development 6-12 March 1995*, New York, New York, United Nations Department of Publications, 1995, p. 57, quoted in Gordon, "Measuring absolute and overall poverty," p. 49.

<sup>93</sup>United Nations, p. 57, quoted in Gordon et al., *Poverty and social exclusion in Britain*, p. 9.

<sup>94</sup>Gordon et al., *Poverty and social exclusion in Britain*, pp. 30 and 69; and Gordon, "Measuring absolute and overall poverty," pp. 54 and 75-77. For the process by which specific questions for this purpose were developed for the 1999 Poverty and Social Exclusion Survey, see Jonathan Bradshaw, David Gordon, Ruth Levitas, Sue Middleton, Christina Pantazis, Sarah Payne, and Peter Townsend, *Perceptions of Poverty and Social Exclusion 1998, Report on Preparatory Research*, Bristol, Townsend Centre for International Poverty Research, University of Bristol, September 1998, pp. 53-58.

<sup>95</sup>Gordon, "Measuring absolute and overall poverty," pp. 63 and 65-70.

<sup>96</sup>Susan E. Mayer and Christopher Jencks, "Poverty and the Distribution of Material Hardship," *Journal of Human Resources*, Vol. 24, No. 1, Winter 1989, pp. 88-114.

<sup>97</sup>Mack and Lansley, pp. 41-43, 45, and 47.

<sup>98</sup>Mack and Lansley, pp. 44 and 50.

<sup>99</sup>Mayer and Jencks, pp. 89-90.