

CSLS Conference on the State of Living Standards and the Quality of Life in Canada

October 30 - 31, 1998 Château Laurier Hotel, Ottawa, Ontario



*Centre for the
Study of Living Standards
Centre d'étude des
niveaux de vie*

Evaluating Measures of Well-Being

David Hay

The Information Partnership

Session 6A: Conceptual and Empirical Issues in the Measurement of Well-being
October 31 8:30 AM - 11:00 AM

EVALUATING MEASURES OF WELL-BEING

Paper prepared by

David I Hay

The Information Partnership

David.Hay@InfoPartners.ca

For presentation to

**The Centre for the Study of Living Standards Conference,
The State of Living Standards and the Quality of Life in Canada**

October 30-31, 1998

DRAFT WORKING PAPER

© October 1998



1650 Chandler Avenue
Victoria, BC V8S 1N6
phone: 250 405 0127
fax: 250 405 0128
www.InfoPartners.ca

EVALUATING MEASURES OF WELL-BEING

◆ OVERVIEW

This paper is an analytical discussion of conceptual and methodological issues in the measurement of well-being. The paper argues that measuring well-being is much more than simply searching for the 'perfect measure'. The measurement of well-being is a dynamic and purposeful exercise that must acknowledge and incorporate social and political processes. The paper closes by applying the analytical discussion and introducing a set of guidelines for the assessment of well-being measures.

The paper was prepared in response to the call for papers from the Centre for the Study of Living Standards (CSLS) in support of their project on *The State of Living Standards and the Quality of Life in Canada*.¹ Specifically, this paper contributes to the CSLS project objective of "critically examining various aspects of the state of living standards and quality of life in Canada". The paper also provides an interpretation of some of the things necessary to "identify the various dimensions in economic and social well-being". As well, the paper discusses issues that can aid the task of creating "specific policies that will contribute to the betterment of the well-being of Canadians".

◆ UNDERSTANDING WELL-BEING MEASUREMENT

There is a great deal of interest, discussion, and activity across the country in developing new understandings and measures of well-being. This is happening among and between different sectors and segments of Canadian society. New approaches to understanding and measuring aspects of social and economic life can be seen by activities and reports on quality of life, indicators (social, economic, societal, local, community, etc.), population health, sustainability, accountability and performance, community well-being, and so on.²

There are many reasons for this interest in well-being measurement: in support of planning, policy-making, education and awareness, advocacy activities, and so on. Perhaps all the current initiatives share the goal of creating an improved, more comprehensive

understanding of life in Canada. Most of the initiatives also want these new understandings to be applied, i.e., for the information created to be used to improve, and make more accountable, public and private decisions that affect well-being.

At the same time, there is an abundance of available and accessible data for measuring the quality of Canadian life. One result of such an opportunity is that researchers and policy-makers have been spurred to action. As a result, there are an increasing number of new measures of well-being: the Index of Social Health, the Quality of Life Index, Local Indicators for Excellence, the Social Well-Being Index, the Human Development Index, the Genuine Progress Indicator, and so on.³

This abundance of activity also raises questions, for example: how will it be known which measures are 'good' measures, and which ones aren't so good?; what exactly should be considered when making such an assessment; and how, and why, should choices amongst measures be made?

Certainly abundant data are not sufficient to produce adequate measures of well-being. The task is more involved than picking and choosing amongst available indicators. This paper argues that a thorough understanding and consideration of conceptual and methodological issues in the measurement of well-being is a necessary starting point for creating valid, reliable, and transparent measures of well-being.⁴ Understanding, measuring, and achieving well-being is not a static exercise, it is dynamic and purposeful. The exercise is imbued with meaning and import, and its social and political aspects and consequences should be acknowledged.

It is first important to consider my interpretation of the context within which well-being measurement is best understood. An evaluative discussion of well-being measurement needs to be situated within an understanding of the relationships between well-being concepts (i.e., how well-being is defined, or what well-being means), well-being measures (i.e., well-being defined in measurable terms), and strategies for well-being (i.e., the ways and means of achieving well-being). As well, each of the three – well-being concepts, measures, and strategies – and the relationships between them, are best (only?) understood if discussed with acknowledgement of the social and political processes that surround their

development and application. These processes are important to understand as they illuminate how and why well-being becomes defined, measured, and achieved.⁵ Figure 1 attempts to graphically represent this understanding of well-being relationships.

► **Measures, Concepts, and Strategies**

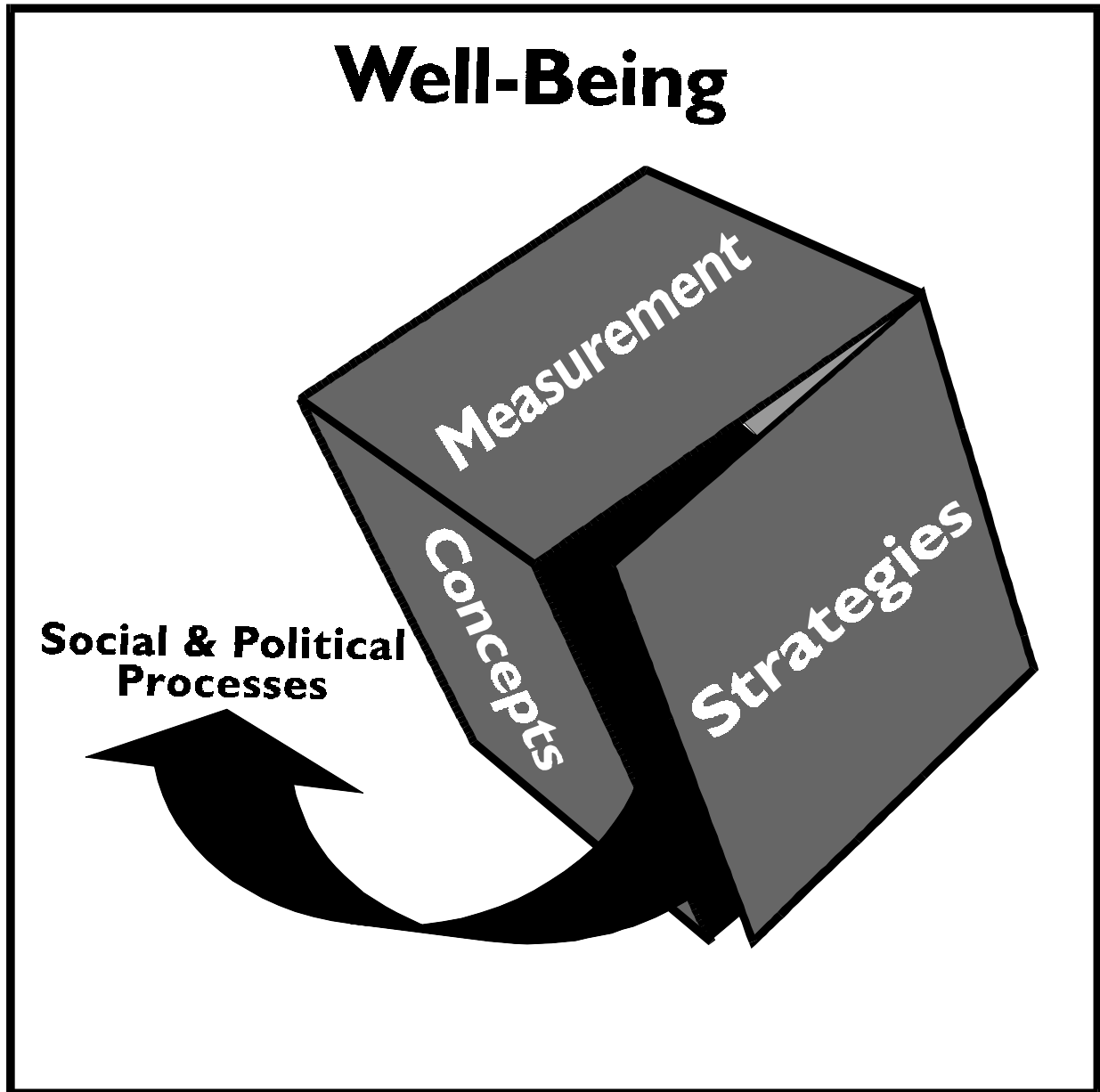
There are two things of primary importance to take from Figure 1. The first is that the measurement of well-being is inextricably bound up with well-being concepts and strategies – i.e., well-being is represented by the entire box in the diagram. What this means is that to completely understand well-being – however it is conceived – requires understanding the relationships between its definition, measurement, and application.

The measurement of well-being is simply a tool – a tool that comes between our understanding of what we want (i.e., what we define as well-being or our conception of ‘the good life’), and our understanding of how we will get what we want (i.e., what strategies we will use to achieve well-being). How we will know when we have achieved what we want is at least partially answered through the information that well-being measures are able to provide. Well-being measures produce the information that contributes to an assessment of the progress – or lack of it – that has been made towards our goal, i.e., well-being.

It would seem, therefore, that the task of understanding well-being measurement should begin by understanding well-being. That is, to measure well-being it would be wise to have some conception of what it is. On the one hand this is plainly good research practice, i.e., concepts should be defined before attempts are made to measure them. On the other hand, however, it is evident that well-being measures can be produced that do not acknowledge well-being concepts, strategies, or the interrelationships between the three.⁶

Many approaches to understanding well-being take defined sectors (such as health, education, housing, employment, and so on), outline measures and indicators for each of the sectors (e.g., mortality rates, number of students completing high school, housing starts, unemployment rates), and then examine levels of achievement on the measures and indicators for each sector.⁷ The sectors are seen to be self-evident. That is, there is no framework that makes plain the relationship between the sectors and a conception of

Figure 1: Understanding Well-Being Measurement



well-being, or any attempt to integrate the sectors and specify their inter-relationships. Moreover, these approaches do not explicitly appeal to, nor are they informed by, fundamental values, principles, or ideals.⁸ Neither a definition of well-being, nor the priorities and policy directions for achieving it, are explicit, they have to be inferred from the total set of measures or indicators that are used to gauge 'progress'.

► States and Processes

The second important insight from Figure 1 further specifies the first. Well-being – either, or all of, its definition, measurement, or application – is best understood as both a state of being, and as a process of seeking. Questions asked to understand states of being include: What is well-being? How is it defined? measured? What are our individual and collective priorities for well-being? Questions raised to understand processes of seeking include: Who defines well-being? i.e., who defines and sets priorities for what we seek? What processes, structures, and institutions support the achievement of well-being? incorporate our values and priorities? aid in the resolution of conflicts and tensions?

The importance of the state and process distinction is two-fold as it applies to measurement of well-being. One, well-being measures themselves should incorporate indicators of social and political processes. This is beginning to be recognized with the inclusion of indicators in some measures of such things as rates of voting, charitable giving, voluntary activity, and so on. Two, and more significant, is that to respect the effectiveness and accountability of any well-being measure requires a fairly high democratic standard. There should be greater access by more people to the decision-making forums where well-being definitions, measures, and strategies are developed and implemented. The Ekos research study of 1995, *Reinventing Government*, provided a clear picture of the different understandings of social and political priorities between 'elites' – public and private sector decision-makers – and the general population.⁹ It could be argued that each group chose priorities in their own interest, but the point is that the elites have the opportunity to make decisions in favour of their priorities in forums where the decisions may affect the population as a whole.

People are always engaging in actions to maintain or enhance their well-being, so an understanding of states of well-being has to encompass understandings of the social and

political processes integral to its achievement. “Definitions of well-being will inevitably be set politically, through the interaction of groups seeking, claiming”.¹⁰ States of being and processes of its seeking are not separable – they are both integral to a fully developed understanding of well-being.¹¹ This is a radical recognition of the respect required for what is essentially the ‘plurality of truth’. It is an understanding that definitions or conceptions of well-being can be – will be – ever changing, as the dynamics of human life and its participants are as well.

Universal conceptions of well-being applied to the ‘human condition’ would seem to be misguided, however, as the foregoing indicates that conceptions of well-being are best understood as particular to people, organizations, communities, culture, and so on. As well, this suggests that there can be no fixed set of measures of well-being when it is understood as a process that is shaped by the claims and identities of various actors.

Given the above, a review of existing well-being measures points to their relative value and limitations as a result.¹² For example, many measurement approaches are developed to be general or ‘one-size-fits-all’, and apply to different groups or places. For example, ‘human needs’ approaches to well-being – where a list of needs is presented (such as, food, shelter, control, autonomy, knowledge, and so forth) – depend on experts’ a priori understanding of the potential and priorities of human experience.¹³ Of course, human needs are not universal, they have to be grounded in human experience as they are particular to communities and cultures.¹⁴ Thus particular community indicators may be more effective and have more meaning.

► **Other Issues**

From the literature on well-being, there are three other issues for consideration, and they are discussed in turn.¹⁵

- *Quantitative and Economic Indicators*

There is an overwhelming reliance on quantitative (and predominantly economic) indicators in most measurement approaches. This can result in measures of well-being primarily

measuring the economy and economic performance. Hence, there is a tendency to neglect the measurement of social aspects of well-being, even in economic terms.¹⁶

There is also a tendency to ignore the measurement of some things simply because they are not easily quantifiable. This suggests that other types of information could be included in measurement approaches. For example, a critical literature review and/or other primary research (e.g., surveys, focus groups, in-depth interviews) could also be legitimately incorporated as information to understand well-being.

- *Social Control*

Indicators can be explicitly or implicitly used for purposes of social control. For example, if measures of well-being or quality of life in a province or nation are primarily economic based, our lives can be indirectly, or even directly, shaped by this focus. Pressure can be exerted on people to change or 'improve' themselves to meet the needs of the economy, rather than the economy being organized to meet the needs of the people.¹⁷ Thus the 'economic bias' of reporting introduced through the use of primarily economic indicators (noted above) can have troubling social consequences.

- *Means and Ends*

Measurement approaches can result in the objectification of social reality (i.e., where measurable standards become ends in themselves, rather than means to other ends). For example, things such as interest rates, Gross Domestic Product (GDP) growth rates, and inflation rates can become goals for well-being, in and of themselves. For example, it is often stated that we have a goal of a certain percentage rate of unemployment, and not a goal of, for example, meaningful and remunerative daily activity. Obviously what is overlooked is that measures should relate to and be viewed in conjunction with other important issues. That is, these measures should be viewed as means to achieve other ends.¹⁸

◆ **ASSESSING WELL-BEING MEASURES**

An acknowledgement of conceptual and methodological considerations in the measurement of well-being should not be regarded as a barrier to work in this area, but rather as a useful means for assessing the preparation and maintenance of well-being measures relative to conceptual and methodological standards, and in the context of social and political processes. The task is not to say yea or nay to any particular measure, rather it is to expose any weaknesses, and suggest ways to overcome them. In this way the attempt is to take a first step towards the creation of an accountability framework for well-being measurement. Based on the analytical discussion in this paper, the following list is proposed as a set of guidelines to assess well-being measures (see Table I).

Table 1: Evaluating Well-Being Measures

Guidelines for Well-Being Measures	
Purpose	Does a stated purpose for the measure exist?
Definition of Concepts	Is there a definition or conception of well-being to guide understanding of the measure?
Dynamic or Static?	
<ul style="list-style-type: none"> • process 	How has the measure been defined, constructed, interpreted, and applied?
<ul style="list-style-type: none"> • content 	Do the indicators, or the measure as a whole, represent a static or dynamic understanding of well-being?
Measuring Up?	
<ul style="list-style-type: none"> • types of indicators 	What is the balance between quantitative / qualitative, economic / social, and other types of indicators?
<ul style="list-style-type: none"> • impact of indicators 	Do the indicators, or the measure as a whole, contribute to social control in any way?
<ul style="list-style-type: none"> • flexibility 	Are there opportunities to customize the indicators, or the measure as a whole, to reflect local priorities and interests?
<ul style="list-style-type: none"> • connected / integrated 	Are the indicators, or the measure as a whole, explicitly connected to a conception or definition of well-being? Are the various indicators integrated in any way?

◆ CONCLUSION

This paper has discussed the importance of considering and addressing conceptual and methodological issues in the development, use, and assessment of the outcomes of well-being measurement activities.

Better measures of well-being are not a sufficient condition for enhancing well-being outcomes. This paper has argued that better well-being measures are only better if they are explicitly linked to well-being definitions and strategies, i.e., to what goals we want to achieve, and how we intend to go about achieving them, with well-being measures as one of the tools.

A list of guidelines to assess well-being measures was proposed. Future versions of this paper will assess particular measures using the guidelines. Measures that will be examined include the Genuine Progress Indicator, the Index for Social Health for Canada, and the Quality of Life Index.

◆ NOTES

1. See the *Project Overview: The State of Living Standards and the Quality of Life in Canada: Perspectives and Prospective* for more information. Available from the Centre for the Study of Living Standards, 111 Sparks Street, Suite 500, Ottawa, Ontario, K1P 5B5, tel: 613 233 8891, fax: 613 233 8250. Also available at the CSLS web site <http://www.csls.ca/slsqloverview.html>. The quotes in the following three sentences are from page 1 of the web version of the *Overview*.
2. For examples, see Lars Osberg and Andrew Sharpe, *An Index for Economic Well-Being for Canada*, 1998; Auditor General for British Columbia and Deputy Ministers' Council, *Enhancing Accountability for Performance*, Victoria: Office of the Auditor General, 1996; David I Hay and Andy Wachtel, *The Well-Being of BC's Children and Youth*, Vancouver: First Call Coalition, 1998; Canadian Policy Research Networks, *Societal Indicators*, 1998 http://www.cprn.com/f_corp/socdis_e.htm; Canadian Council on Social Development, *Measuring Well-Being: Proceedings from a Symposium on Social Indicators*, Ottawa, CCSD, November, 1996. As well, see the many contributions to the CSLS project, available from CSLS, and at <http://www.csls.ca/october.html>.
3. Satya Brink and Allen Zeesman, *Measuring Social Well-Being: An Index for Social Health for Canada*, Ottawa: Human Resources Development Canada, June 1997; Malcolm Shookner, *The Quality of Life in Ontario 1997*, Toronto: Ontario Social Development Council/Social Planning Network of Ontario, October 1997; Nicole Martel, *Edmonton LIFE: Local Indicators for Excellence*, Edmonton: Edmonton Social Planning Council, 1997; Mark Fraser, *Social Well-Being Index: Hamilton-Wentworth Region Spring Update - 1998*, Hamilton: Social Planning and Research Council of Hamilton-Wentworth, 1998; United Nations Development Programme, *Human Development Report 1998*, New York: Oxford, 1998; Clifford Cobb, Ted Halstead, and Jonathan Rowe, *The Genuine Progress Indicator: Summary of data and methodology*, San Francisco: Redefining Progress, 1995.
4. The following discussion is an extension and further development of work undertaken through the Social Development Research Program, a joint program of research conducted from 1991-1995 by the Social Planning and Research Council (SPARC) of BC and the Faculty of Human and Social Development at the University of Victoria. The Program was funded by National Welfare Grants, Health and Welfare Canada (now Social Development Partnerships, Human Resources Development Canada). There were two senior researchers for the duration of the program – Deborah Rutman at UVic and myself at SPARC. For more information on publications and products from the research program, contact SPARC, <http://www.vcn.bc.ca/sparc>.
5. These issues are discussed – in part, in various ways, and from different analytical perspectives – in the following: Marcia Rioux and David I Hay (eds), *Well-Being: A Conceptual Framework*; Patrick Kerans and Glenn Drover, *Well-Being & Social Movements*; David I Hay and Deborah Rutman, *Well-Being, Community & Measurement*; Michael Bach, Leon Muszynski and Marcia Rioux, *Well-*

Being, Society & Institutional Development. These four papers were published together in *Well-Being: A Conceptual Framework and Three Literature Reviews*, Vancouver: Social Planning and Research Council of BC, 1993. See also, David I Hay, *Well-Being: A literature review and annotated bibliography*, Vancouver: SPARC-UVic Social Development Research Program, Working Paper WP2(2), 1992; Glenn Drover and Patrick Kerans, *New Approaches to Social Welfare Theory*, Aldershot, England: Edward Elgar, 1993; The Roeher Institute, *Social Well-Being: A paradigm for reform*, Toronto: The Roeher Institute, 1993.

6. See Hay, *op.cit.*; Hay and Rutman, *op.cit.*
7. For examples see J.E. Stiff and D.L. Silver, *Quality of Life Index for Pasadena*, Pasadena, CA: Pasadena Public Health Department, 1991; Index for Social Health, *Monitoring the Social Well-Being of the Nation*, Tarrytown, NY: Fordham Institute for Innovation in Social Policy, 1995; Brink and Zeesman, *op.cit.*; Fraser, *op.cit.*
8. For example, the Index for Social Health for Canada assesses indicators "against past performance rather than an ideal standard" (Brink and Zeesman, *op.cit.*, p.11).
9. See Ekos Research Associates, *Reinventing Government*, Ottawa: Ekos, 1995.
10. Kerans and Drover, *op.cit.*, p.52.
11. For theoretical and philosophical arguments on this point, see Kerans and Drover, *op.cit.*; and, Drover and Kerans, *op.cit.* For a restatement and elaboration of this point as it applies to measurement and community, see Hay, *op.cit.*; Hay and Rutman, *op.cit.* For a discussion related to social and institutional development, see Bach, Muszynski, and Rioux, *op.cit.* See also Rioux and Hay, *op.cit.*, for an integration of these perspectives.
12. Hay and Rutman, *op.cit.*
13. An application of a basic needs approach to defining well-being is the establishment of conceptions and measures of poverty. Obviously a definition of poverty will depend on the range of needs defined as basic. Chris Sarlo defines basic needs very narrowly and estimates that less than one million Canadians are living in poverty (Chris Sarlo, *Poverty in Canada*, Vancouver: The Fraser Institute, 1992). Other definitions of poverty put estimates to five times that amount (David P. Ross and Richard Shillington, *The Canadian Fact Book on Poverty 1989*, Ottawa: Canadian Council on Social Development). The question is which definition of basic needs more closely approximates an acceptable normative criterion?
14. See Patrick Kerans, *Welfare and Need*, Paper presented to the Fifth National Conference on Social Welfare Policy, Lennoxville, Quebec, 1991; Peter Penz, *Normative Issues in Social Needs Assessment: A Theoretical Overview*, York University, Faculty of Environmental Studies, 1986; Elizabeth Whitmore and Patrick Kerans, "Participation, Empowerment, and Welfare", *Canadian Review of Social Policy*, 22:51-60, 1988; Sharon Manson Willms and Leslie Gilbert, *Healthy*

Community Indicators: Lessons from the Social Indicator Movement, University of British Columbia, Centre for Human Settlements, 1991; Michael Hayes and Sharon Manson Willms, *Healthy Community Indicators: The Perils of the Search and the Paucity of the Find*, University of British Columbia, Health Policy Research, 1990.

15. See Hay and Rutman, *op.cit.*
16. See Hazel Henderson, *Paradigms in Progress: Life Beyond Economics*, Indianapolis, IN: Knowledge Systems, 1991; T.M. Power, *The Economic Value of the Quality of Life*, Boulder, CO: Westview, 1980; T.M. Power, *The Economic Pursuit of Quality*, Armonk, NY: M.E. Sharpe, 1988.
17. F. Nectoux, "Social indicators: for individual well-being or for social control?" *International Journal of Health Services*, 10:89-113, 1980.
18. Joel Lawson, *The Use of Indexes in Achieving Sustainable and Healthy Communities*, Task Force on Planning Healthy and Sustainable Communities. Vancouver: University of British Columbia. 1991.